8 Month Review & Budgeting In Hyperion Planning Refresher
OBJECTIVES

- 8 Month Review Planning Process
- Operating Expense (OPEX) 8 Month Review
  - OPEX Hyperion Form
  - Variance Report
- Labour Salaries and Benefits 8 Month Review
  - HR Master data.
  - Hyperion Labour Plan based on initial data (Pre-Population).
  - How to Adjust Labour Forecast using Hyperion Planning.
  - Reviewing the Labour Plan using reports.
SEND 8 Month Review & Budget to GL / COPY to FINAL version in Hyperion

SEND Actual $ from GL to Hyperion
SEND Employee Master Data from HR
Send Salary Actuals from Payroll

Update 8 Month Review Plan, Update Budget Update Forecast in Hyperion

Update assumptions
Generate Labour Forecast

SEND 8 Month Review & Budget to GL / COPY to FINAL version in Hyperion

APPROVE

Update assumptions
Generate Labour Forecast

Update 8 Month Review Plan, Update Budget Update Forecast in Hyperion

APPROVE

Update assumptions
Generate Labour Forecast

Update 8 Month Review Plan, Update Budget Update Forecast in Hyperion

APPROVE

Update assumptions
Generate Labour Forecast

Update 8 Month Review Plan, Update Budget Update Forecast in Hyperion

APPROVE

Update assumptions
Generate Labour Forecast

Update 8 Month Review Plan, Update Budget Update Forecast in Hyperion

APPROVE

Update assumptions
Generate Labour Forecast
Login

- Enter the following URL: https://dmacapps65.mcmaster.ca/Citrix/
  - Note: This URL is for Training environment ONLY. The Production URL is indicated in your handouts.
- Enter your MACID and password
- Click on the Excel Icon entitled SmartView
- Click on the Open button on the banner in the bottom part of the screen.
- A pop-up shows status.
- Excel opens
Connecting to the Hyperion Database using SmartView

1. Click on SmartView Tab
2. Click on Panel Icon
3. In the Panel, Click on Shared Connections
4. Enter Login & Password
5. In the Shared Connections Panel, Open drop down
7. Expand Hypsitf01
8. Expand McM_Plan
9. Expand Forms
10. Expand 1. OPEX
11. Expand the appropriate FUND (Operating fund 20, Ancillaries fund 30, Specially Funded fund 45)
12. Double Click on 2. OPEX 8 MONTH REVIEW 2015
Connecting to the Hyperion Database using SmartView

| A1 | B   | C   | D   | E   | F   | G   | H   | I   | J   | K   | L   | M   | N   | O   | P   | Q   | R   | S   | T   | U   |
|----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
|    |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
**Edit cells**

- **SUBMIT = SAVE**

Yellow cells are editable.

Grey cells are LOCKED.
POINT OF VIEW: Shows the Criteria of the Data shown on the form.
The different dropdowns are:

- Department: Lists the departments you are entitled to.
- Program: Lists all the available Programs.
- Type of Expenditure: One-Time or On-Going.
- Version: Lists what version you are working on: Working, or any of the What-If versions.
- Fund: READ ONLY indicates the fund. Please note that there are different forms for each fund. Hyperion only has the data associated to Operating fund (20), Ancillaries Fund (30) and Specially Funded (45).
### Current Year Section:
- This is the section in which the 8 Month Review data is stored.
- It is pre-populated with the year to date actuals and 5 Month Review.
- Users can update the data values.
- Users can expand to view monthly drilldown by clicking on the plus sign (+) next to the Year Total Label.

### Budget Year Section:
- This is the section in which the BUDGET data is stored.
- It is pre-populated based on the 5 Month review Budget.
- Users can expand to view monthly drilldown by clicking on the plus sign (+) next to the Year Total Label.

### Forecast years Year Section:
- Not pre-populated.
- Users may enter a year Total forecast.
- Can’t Expand
### 8 Month Pre-Populated DATA

#### Hyperion Original Budget (from SAS FM)

<table>
<thead>
<tr>
<th>May</th>
<th>Jun-Aug</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014/15 Budget</td>
<td></td>
<td>100</td>
</tr>
<tr>
<td>2014/15 Budget</td>
<td></td>
<td>100</td>
</tr>
</tbody>
</table>

#### 5 Month Review pre-populated with budgeted annual total

<table>
<thead>
<tr>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep-Aug</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014/15 YTD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>20</td>
</tr>
</tbody>
</table>

#### Pre-populated actuals remain static

<table>
<thead>
<tr>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep-Aug</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>9</td>
<td>2</td>
<td>3</td>
<td>10</td>
<td>100</td>
</tr>
</tbody>
</table>

#### Users forecast remaining months and annual total

<table>
<thead>
<tr>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep-Aug</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014/15 5 Month Review Revised by users in forms</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>108</td>
</tr>
</tbody>
</table>

#### User input

- Actuals loaded for closed months
- PeopleSoft GL Actuals
- Pre-populated actuals
- Calculated

---

<table>
<thead>
<tr>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep-Aug</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>9</td>
<td>2</td>
<td>3</td>
<td>10</td>
<td>100</td>
</tr>
</tbody>
</table>

---

<table>
<thead>
<tr>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep-Aug</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>9</td>
<td>2</td>
<td>3</td>
<td>11</td>
<td>110</td>
</tr>
</tbody>
</table>
When are cells Locked (Grayed out)?

- Represents a calculation:
  - Appropriations
  - High level Accounts is the SUM of all the lower level values.
- Represents Actuals or Previous Budget
- Form has been submitted for Approval
Un-Suppress Account

- **When to use?**
  - The 8 Month review form suppresses (hides) Accounts that have NO data.
  - If the pre-populated form doesn’t show a specific account, that means that there was no Original Budget and no actuals for that account.
  - If we need to add a forecast to an account that does NOT show in the pre-populated form, we can UN-SUPPRESS a specific account using this function.
Un-Suppress Account

• How?
  - Right-click on any cell in the smart view form, and select the Smart View option to Open the SmartView Menu.
  - Select the Un-Suppress Accounts option from the SmartView menu.
  - The pop-up opens. Then select the account to un-suppress and the scenario.
LABOUR PLANNING
8 Month Review
How does Hyperion Planning fit within MOSAIC?

- Hyperion Receives Salary Expense Actuals from GL Monthly
- When GL & PR don’t match there’s a HEDGE
- Hyperion Receives Salaries from Payroll
- Hyperion Sends FINAL 8 Month review & Budget to GL
- Hyperion Receives Employee Master Data from HR twice a year

PeopleSoft GL
PeopleSoft HR
PeopleSoft Pay Roll
Assumptions

Budgeting Services will maintain the assumptions in accordance to the collective agreements and the budgeting committee guidelines.

The Assumptions will be available to planners READ ONLY.

NAVIGATION:
hyprdp01 > McMPlan > Forms > 2. LABOUR > 2.1 ADMIN

- Number of pay periods per month
- Grade % Increase to be applied per fiscal year
- Grade/Step amount increase to be applied per
- Merit Increase Effective Month
- Benefit % based on Salary Range
Employee Master Data
Source of Record: PeopleSoft HR
Read Only
Employee Master Data

- Employee
  - LAST NAME_FIRST NAME_EMPLOYEE ID_POSITION NO
- Start and end dates (if any)
- Hourly rate
  - Adjusted for leaves, e.g. 90% of regular pay for research leave
- Standard hours
  - Maximum weekly hours (35, 37½, 40) – used as denominator for FTE calculation
- Current standard hours (no overtime)
  - Scheduled hours for individual employees, e.g. 17½ hours/week = 0.5 FTE

Base Salary
Employee Master Data

- Benefit group, e.g. MUFA, TMG, Unifor1
- Job grade and step
  - *Used in salary calculations, may be “None” for some benefit groups*
- Benefit plan
  - *Currently defaulting to DB = Defined benefit pension*
- GL salary and benefit accounts
- Stipend amount per pay (no start or end dates)
  - *Taken from last actual pay*

Salary Increases

Total Compensation
Master Data shown in Hyperion

The employee data sent from HR can be reviewed in the EXISTING EMPLOYEES – READ form.

NAVIGATION:
hyprdp01 > McMPlan > Forms > 2. LABOUR > 2.2 PLANNERS > 01. EXISTING EMPLOYEES-READ
Salary and Current Hours - Actuals
Source of Record: PayRoll
Read Only

This information is loaded monthly (at month end).

- Actual hours worked by each employee for the closed month.
- Actual salary paid to each employee for the closed periods.
- Actual Benefits paid to each employee for the closed periods.
Employee Adjustable Data

Planners may adjust some Employee values in order to forecast accurately the salary and benefits expense for said employee.

The adjustable entries are:

- Employee End Date
- Hourly Rate
- Current Standard Hours
- Over Time Hours
- Stipend amount per pay
- Stipend Start and End Dates
Forecasted Data

Source of Record: Calculated by Hyperion Read Only

- **SALARY**
  - Based on the Master data and the Assumptions, Hyperion calculates the total Salary forecast per month per employee for the current year’s open months.

- **BENEFITS**
  - Based on the Master data and the Assumptions, Hyperion calculates the total Benefit forecast per month per employee for the current year’s open months.

- **FTE**
  - Based on the Standard Hours from the Master Data and the Current Actual Hours, Hyperion calculates the FTE forecasts for the current year’s open months.

- When planners change any of the adjustable data entries, the system will recalculate the Salaries, Benefits and FTE’s accordingly.

- All forecasted data is summarized by account in the GL.
PRE-POPULATION of Labour Forecast
LOAD ACTUALS

HEDGE ACTUALS TO MATCH THE GL

FORECAST HOURS

DETERMINE INCREASES

Salaries Stipends Benefits

PRE-POPULATION

Grade Step Emp. Group

FORECAST

SALARIES BENEFITS

FTE

McMaster University

Mosaic
Navigation

- Planners will have the labour forms available on the SmartView Panel.
- To open the form, just double click on the form name.
- Planners may have multiple forms open in one excel workbook using different excel sheets.
1. Review Labour Summaries by Account to see the high level forecast.
2. Review Labour Summary by Account and Employee to drill down on the information.
4. Adjust Existing Employee’s End Date, Base salary and Stipends where necessary.
5. Add New Employees where necessary
6. Adjust Hours and Overtime where necessary.
7. Adjust Hedge at an account level where necessary.
REVIEW Data loaded from PeopleSoft
Labour Budget Summary by Account

- Summary forms are specially useful to review when starting the process of labour budgeting as it will show at a high level the forecast that the system has calculated based on the HR data.

- Labour Budget Summary by Account

![Labour Budget Summary by Account table](image)
Labour Budget by Account Employee

This Report shows the forecast grouped by GL-Account. It shows all the employees who’s Salary or benefit are being charged to each account.

<table>
<thead>
<tr>
<th>A</th>
<th>D</th>
<th>FY15 +YearTotal</th>
<th>FY16 +YearTotal</th>
<th>FY17 YearTotal</th>
<th>FY18 YearTotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>LA_500001 Academic Full Time Salary</td>
<td>131,836.00</td>
<td>166,489.20</td>
<td>167,107.20</td>
<td>167,428.56</td>
</tr>
<tr>
<td></td>
<td>Albus_Dumbledore_0000000000002794</td>
<td>-7,000.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>LA_500001 Academic - CAWAR</td>
<td>124,836.00</td>
<td>166,489.20</td>
<td>167,107.20</td>
<td>167,428.56</td>
</tr>
<tr>
<td></td>
<td>Assistant_Dobby_0000000000011385</td>
<td>76,321.00</td>
<td>97,118.70</td>
<td>97,479.20</td>
<td>14,059.50</td>
</tr>
<tr>
<td>6</td>
<td></td>
<td>-3,500.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>LA_510001 Benefits Academic FT</td>
<td>50,237.88</td>
<td>53,276.54</td>
<td>55,145.38</td>
<td>58,014.00</td>
</tr>
<tr>
<td></td>
<td>Albus_Dumbledore_0000000000002794</td>
<td>50,237.88</td>
<td>53,276.54</td>
<td>55,145.38</td>
<td>58,014.00</td>
</tr>
<tr>
<td>8</td>
<td></td>
<td>-2,800.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>LA_510011 FB Academic - CAWAR</td>
<td>47,437.66</td>
<td>53,276.54</td>
<td>55,145.38</td>
<td>58,014.00</td>
</tr>
<tr>
<td></td>
<td>Assistant_Dobby_0000000000011385</td>
<td>37,082.29</td>
<td>44,674.60</td>
<td>49,815.22</td>
<td>9,300.36</td>
</tr>
<tr>
<td>10</td>
<td></td>
<td>-1,100.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>LA_540001 Support Salaries FT</td>
<td>1,759,080.00</td>
<td>2,661,704.50</td>
<td>2,754,436.85</td>
<td>2,787,336.15</td>
</tr>
<tr>
<td></td>
<td>Thorn_Deni_m_000000055500011431</td>
<td>50,041.60</td>
<td>43,078.20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td></td>
<td>-38,918.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>LA_541001 Support Salaries Part Time</td>
<td>3,817,739.96</td>
<td>2,861,410.18</td>
<td>2,877,712.41</td>
<td>2,873,092.45</td>
</tr>
<tr>
<td></td>
<td>Neville_Longbottom_0000000000010133</td>
<td>390.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td></td>
<td>-60.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>LA_541001 Invalid Combo HCM Earnings</td>
<td>58,296.00</td>
<td>97,118.70</td>
<td>97,479.20</td>
<td>97,666.66</td>
</tr>
<tr>
<td></td>
<td>Minerva_Megagoniali_00000000000109963</td>
<td>58,296.00</td>
<td>97,118.70</td>
<td>97,479.20</td>
<td>97,666.66</td>
</tr>
<tr>
<td>22</td>
<td></td>
<td>330.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>24</td>
<td></td>
<td>34,020.00</td>
<td>54,005.00</td>
<td>54,600.00</td>
<td>54,705.00</td>
</tr>
<tr>
<td>26</td>
<td></td>
<td>9,819.12</td>
<td>12,781.06</td>
<td>14,902.13</td>
<td>17,447.87</td>
</tr>
<tr>
<td>28</td>
<td></td>
<td>-7,036.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Adjusting Data
Override Existing Employee End Date

- From 04.2 OVERRIDE END DATE form
- Enter the new end date in the END_DATE_OVERRIDE column for the employee that requires an override
- Click Submit
- The END_DATE column is then populated with the new end date.
- The system recalculates the forecast to expand the calculations up to the new end date entered.

3. SUBMIT data

1. Enter Point Of View
2. Enter Adjusted End Date
Adjusting Hourly Rate to Existing Employee

- If Necessary, planners can adjust the base hourly rate to an employee within their department.
- The adjusted rate will be ADDED to the hourly rate loaded from HR.
- Negative adjustments are valid.
- Navigation:
  - Hyprdp01>McM_Plan>Forms>2.Labour>04.1 EXISTING EMPLOYEES - INPUT

### Instructions

1. Enter Point Of View
2. Enter Hourly rate adjustment.
   - NOTE: The adjusted rate will be ADDED to the hourly rate from the Master File
3. SUBMIT data

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>FY15 20 D_10431 Hospitality Central Admin</td>
<td>On-Going Working</td>
<td>Hourly_rate_adj</td>
<td>Stipend_start_date</td>
<td>Stipend_end_date</td>
</tr>
<tr>
<td>2</td>
<td>Albus_Dumbledore_000009999_000002794</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Assistant_Dobby_000999999_00011385</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Minerva_Mcgonagall_000999999_00103963</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Neville_Longbottom_000999888_00011033</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Thorn_Damiel_000000666_00011431</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Baggins_Frodo_000012345_00016107</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Potter_Harry_049342000_00010130</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Potter_Harry_049342000_00010131</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Luna_Lovegood_0000456789_0000015896</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Luna_Lovegood_0000456789_0000015897</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Evans_Lilly_0000123789_0000013256</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Adding or Adjusting Stipend to Existing Employee

- Planners can also assign a Stipend to an employee within their department.
- The Stipend may have a specific start and end dates within the forecast period.
- If no end data is specified, the application will add the stipend up to the end of the forecast period.
- If no Start date is specified, the application will add the stipend from the first open month of the forecast period.

Navigation:
- Hyprdp01>McM_Plan>Forms>2.Labour>04.1 EXISTING EMPLOYEES - INPUT

1. Enter Point Of View
2. Enter Stipend Rate Adjustment, Stipend start and end date (if any)
3. SUBMIT data
Copying Employee Data

- Planners may need to copy the data related to an existing employee into a different Department, Program or Type.
- An example is the need to add “One-Time” stipend to an existing Employee.
- In this case, planners can copy all the master data for said employee into the “One-Time” type and then enter the stipend using the Existing Employees Input form.
- From the EXISTING EMPLOYEES- INPUT Form.
- Select POV.
- Right Click on editable cell of the employee to be removed to open Menu
- Select SmartView option.
- Select Copy Existing Employee.
- Select the TARGET where the data shall be copied (in the example above, select “One-Time” Type).
- Click OK.
After the copy function completes, Planners may make changes to the employee.

Following the example, In order to add the stipend, the first step is to change the POV to type “One-Time”.

The employee now shows up and planners may enter stipend, start and end date.
Adding New Employees

- Planners can forecast for new employees in their departments.
- For a new employee, planners will need to enter all the required data to calculate the forecast.
- Planners can “group” multiple new employees into one New employee for budgeting purposes I.E. planning for T.A’s that will all charge to the same GL-Accounts.
- Planners must always use the first empty NEW_EMPLOYEE in the form.

Navigation:
- Hyprdp01>McM_Plan>Forms>2.Labour>02. NEW EMPLOYEE - INPUT

1. Enter Point Of View
2. Enter the data for NEW_EMPLOYEE.
   **NOTE:** MUST enter data for NEW_EMPLOYEE_01 always first. If it’s empty → use it.
3. SUBMIT data
Adding New Employees to Represent a group of TA’s

- What Planners KNOW:
  - Annual Budget I.E. $25,000
  - YTD Actuals (This can be obtained from the Labour Summary by Account report) I.E. $5,000
  - Hourly Rate I.E. $20
  - Remaining weeks in the year (This can be obtained from the Number of pay periods per month form under the Assumption) I.E. 30.1429

- Calculate:
  - Remaining Budget = Annual Budget – YTD Actuals
    - $25,000 - $5,000 = $ 20,000
  - Current Std Hours = (Remaining Budget / Hourly Rate) / Remaining weeks in the year
    - ($20,000 / $20) / 30.1429 = 33.18

- Enter in the New Employee form:
Adding New Employees to Represent a group of Sessional Lecturers

- What Planners KNOW:
  - Annual Budget I.E. $50,000
  - YTD Actual Salary (This can be obtained from the Labour Summary by Account report) I.E. $5,000
  - YTD Actual hours I.E. 50
  - Annual Deemed Hours I.E. 500
  - Remaining weeks in the year (This can be obtained from the Number of pay periods per month form under the Assumption) I.E. 30.1429

- Calculate:
  - Current Standard Hours per week = \( \frac{(Annual \text{ Deemed hours} - YTD \text{ Actual hours})}{Remaining \text{ Weeks in the year}} \)
    - \( \frac{(500 - 50)}{30.1429} = 14.93 \)
  - Hourly Rate = \( \frac{(Annual \text{ Budget} - YTD \text{ Actual Salary})}{(Annual \text{ Deemed hours} - YTD \text{ Actual hours})} \)
    - \( \frac{($50,000 - $5,000)}{(500 - 50)} = $100 \)

- Enter in the New Employee form:
Adding New Employees to Represent a group of Temp - Casual

- What Planners KNOW:
  - Annual Budget I.E. $50,000
  - YTD Actual Salary I.E. $6,000
  - Remaining weeks in the year (This can be obtained from the Number of pay periods per month form under the Assumption) I.E. 30.1429
  - Current Standard Hours. In this case it should be the Total hours per week for all the Temp/Casuals I.E. 140

- Calculate:
  - Hourly Rate = (Annual Budget – YTD Actual Salary) / (Current Standard hours * Remaining weeks in year )
    - $(50,000 - $6,000) / (140 * 30.1429) = 10.43

- Enter in the New Employee form:
Adjusting Labour Hours

- Once all master data has been adjusted, planners may validate the individualized forecast using the Labour hours input.
- If necessary, planners may adjust hours forecast by employee.
- From the Labour Hours Input Form
  - Select POV. Refresh
  - Enter the amount of hours per period in the editable cells.
  - Note that the FISCAL YEAR is at the POV. Planners can change the hours for every open fiscal year by selecting the appropriate year in the POV, and refreshing the form.
- Submit

Navigation:
- Hyprdp01>McM_Plan>2.LABOUR>2.2 PLANNERS>05.LABOUR HOURS INPUT
Entering Over Time Hours for any Employee

- Planners have the option to forecast for overtime at an employee level.
- From the Labour Overtime Hours Input form
- Select the POV and refresh.
- Enter the forecast for overtime hours.
- Submit

Navigation:
- Hyprdp01>McM_Plan>2.LABOUR>2.2 PLANNERS>06.LABOUR OVERTIME HOURS INPUT
Entering Hedge at an Account Level

- Planners may add a forecast at an account level. We call these adjustments **HEDGE**.
- From the Hedge Salaries Input form
- Select POV and Refresh.
- Enter Hedge at month or year level.
- Submit

**Navigation:**
- Hyprdp01>McM_Plan>2.LABOUR>2.2 PLANNERS>06.LABOUR OVERTIME HOURS INPUT
Un-Suppress Labour Account for Hedge

- Planners may un-suppress an account in order to enter a hedge adjustment.
- Start in the Hedge Salaries Input form.
- Right Click on any editable cell to open Menu
- Select SmartView option
- Select Un-Suppress Labour Account for Hedge.
- Select Account to Un-suppress from the list. Click OK
- Account will appear on the form.

Navigation:
- Hyprdp01>McM_Plan>2.LABOUR>2.2 PLANNERS>06.LABOUR OVERTIME HOURS INPUT
How Does Workflow work?

- After Planners are done with their changes, they submit the 8 Month Review and Budget to the Envelope Manager for approval.
- Envelope managers have the option to approve and submit to Budgeting Services. Or reject changes and send back to the planner for modifications.
How to Submit 8 Month Review for Approval

- On the Planning menu, click on Approvals
- Select a view from the drop down menu and click Refresh
- Highlight a Planning Unit to promote where you are the Current Owner, and click on Change Status. In Approvals window, select Action from the drop down box, and Submit
- Refresh the screen to view the current owner (you may need to use Tree View).
Budgeting for Group of Employees

- Teacher’s Assistants (TAs)
- Sessional Lecturers
- Temp Casual
Budgeting TAs under one NEW EMPLOYEE

- There are 2 distinct groups for TA’s: Grad and Under grad. Have each group under different New Employees
- When creating the New Employee in the form 02. NEW EMLOYEES - INPUT, add the following information:
  
<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
<th>L</th>
<th>M</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>START_DATE</td>
<td>END_DATE</td>
<td>HOURLY_RATE</td>
<td>STIPEND_START_DATE</td>
<td>STIPEND_END_DATE</td>
<td>STIPEND_RATE</td>
<td>ADJ_STD_HRS</td>
<td>(35,37,5,40)</td>
<td>CUR_STANDARD_HOURS</td>
<td>BENEFIT_GRP</td>
<td>JOB_GRADE_STEP</td>
<td>GL_SALARY_ACCT</td>
<td>GL_BENEFIT_ACCT</td>
</tr>
<tr>
<td>NEW_EMPLOYEE_01</td>
<td>1/5/2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>35.00</td>
<td></td>
<td>CUPE (Unit 1) Teaching Assista</td>
<td>GR_B</td>
<td>LA_522011 TA- Undergraduate</td>
<td>LA_533011 FB TA- Undergraduate</td>
</tr>
<tr>
<td>NEW_EMPLOYEE_02</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Under Hourly Rate, enter the hourly rate, enter the appropriate rate for the TA type
- In most cases Planners know the total yearly salary amount they have for TA’s
- Under the Current Standard hours enter the result of calculating:
  - (Total Yearly Salary / hourly Rate) / 52
- I.E. Our total budget for TA’s is $25,000 and Under grad TA’s are paid $20 per hour, then the current standard hours to enter in the form should be
  - (25000/20)/52 = 24 hours
Q&A