Hyperion Quick Guide
Log in and access forms and reports

Note: Citrix Receiver must be installed on your computer. Follow steps in Citrix Receiver Installation Instructions at http://www.mcmaster.ca/bms/BMS_FS_Budgeting.htm

1. Log in to Citrix using Mac ID
   https://macapps65.mcmaster.ca/vpn/index.html

2. First time only: Modify URL
   http://hyppd01.uts.mcmaster.ca:19000/workspace/SmartViewProviders
   Upper case required on SmartViewProviders

3. Connect to Smart View
   - Smart View tab
   - Panel
   - Shared Connections
   - Log in using Mac ID

   - Click on Excel icon and open
   - Budget submission report
   - Also available:
     FY14 variance report
     FY15 monthly reports

4. Select server and open reports
   - Oracle Hyperion Planning, Fusion Edition
   - Click (+) to open directories
   - Double click on a form or report name to open
   - TIP: Click on a new Excel sheet in an open workbook to open reports and forms in one workbook

2. Open report folders
   - Click on Explore

   - See instructions for running reports in Hyperion Variance Reports and Drilldown on Budgeting Services web site
     http://www.mcmaster.ca/bms/BMS_FS_Budgeting.htm

   - See instructions for running reports in Hyperion Variance Reports and Drilldown in Hyperion Preferences and Options Setting on Budgeting Services web site
     http://www.mcmaster.ca/bms/BMS_FS_Budgeting.htm

Normally set first time: Preferences and Options
   - Click on Internet Explorer icon and open
   - See instructions for setting in Hyperion Preferences and Options Setting on Budgeting Services web site
     http://www.mcmaster.ca/bms/BMS_FS_Budgeting.htm

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*Note on Reports E and N
- The ability to drilldown on two dimensions (Department and Program) is a drain on system resources. The report may take several minutes to open, and there is a risk that it will time out before completion. This report should not be run by anyone with access to all departments.
Hyperion Quick Guide

Enter forecast in Opex forms

1. Select criteria on point of view
   - All criteria must be at bottom level to get editable yellow cells on the form
   - Summary levels are read only grey cells

   **Example**
   - Department
     - Bottom level: D_ and department number
     - Tree roll-up levels: See chart on Budgeting site**
     - User security is based on department
   - Program
     - Bottom level: P_ and program number
     - All Programs: P_ALL
   - Type
     - Bottom levels: On-Going and One-Time
     - Total: All Type

2. Refresh
   - Updates data when criteria on point of view has changed

3. Enter data
   - Editable lines are yellow
   - Summary lines are grey
   - Changes turn darker yellow until submitted

   **Example**
   - Account
     - Bottom level: A_ and account number
     - Accounts with no activity are suppressed (hidden)*
     - Labour accounts are shown at a summary level. Budgets are entered through the Labour Planning module.
   - Summary section
     - Total for department/program regardless of Type selected in point of view
     - Negative bottom line is a surplus

DEBITS ARE POSITIVE
CREDITS ARE NEGATIVE

- YTD actuals are updated as months are closed
- Double click (+) to expand
- Double click (-) to collapse

Excel functionality
- To maintain column and row headings: Excel View tab / Freeze Panes
- All Excel functions including may be used, however formatting will re-set on Refresh
- Formulas convert to numbers on Refresh – cell comments and supporting details may be entered through Hyperion**

Entering data
- 8 Month Review and Budget are pre-populated with annual total from 5 Month Review (Budget with On-Going only)
- Forecast may be entered as an annual total (automatically spread back to months) or in individual months

- Click Show Aliases to search by name
- Click binoculars to enter in search box
- Select multiple accounts to unsupresss
- Move to selection box & click OK
- Click OK to run process

*Unsuppress (display) accounts
- Right click on any cell
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- Unsuppress accounts

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**Budgeting Services web site
http://www.mcmaster.ca/bms/BMS_FS_Budgeting.htm
Download Hyperion Reference Guide Opex Module for additional features:
- Add cell comments
- Add supporting details
- Adjust an existing value
- What-If versions
- Copy to another department/program
- Lock cells
- Mass delete/copy across summary chartfields
Hyperion Quick Guide

Enter forecast in Labour Planning forms

1. Select criteria on point of view
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   **Department**
   - Bottom level: D_ and department number
   - Tree roll-up levels: See chart on Budgeting site
   - User security is based on department

   **Program**
   - Bottom level: P_ and program number
   - All Programs: P_ALL

   **Type**
   - Bottom levels: On-Going and One-Time
   - Total: All Type

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   - Bottom level: A_ and account number
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   - Labour accounts are shown at a summary level. Budgets are entered through the Labour Planning module.
   - Summary section
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   - Negative bottom line is a surplus
   - YTD actuals are updated as months are closed
   - Double click (+) to expand
   - Double click (-) to collapse

4. Submit Data
   - Sends data to the database
   - Changed cells turn back to light yellow

   **Summary section**
   - Total for department/program regardless of Type selected in point of view
   - Negative bottom line is a surplus
   - YTD actuals for closed months

   DEBITS ARE POSITIVE
   CREDITS ARE NEGATIVE

   Entering data
   - 8 Month Review and Budget are pre-populated with annual total from 5 Month Review (Budget with On-Going only)
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**Unsuppress (display) accounts
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   - Unsuppress accounts

- Click the magnifying glass
- Click Show Aliases to search by name
- Click binoculars to enter in search box
- Select multiple accounts to unsuppress
- Move to selection box & click OK
- Click OK to run process

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Enter forecast in Labour Planning forms

1. Open folder 2.2 PLANNERS to access Labour Planning forms and reports

2. Review pre-populated employees

3. Enter changes

- Forecast hours worked (regular and overtime)
- Hourly rates
- Stipend amount, start and end dates
- Hedge adjustments to calculated forecasts

4. Review summary forecast

For all forms:
- All criteria must be at bottom level to get editable yellow cells on the form
- Summary levels are read only grey cells
1. Choose Year, Fund, Department, Program, Type and Version on point of view
2. Click refresh to display data in the form for the new criteria in the point of view
3. Click submit to save data input to the database

Program
- Displays all programs for department
Employee
- Last name_First name_ID_Position
Employee dates
- Pay is calculated for the full month if active
- End date may be adjusted*
Weekly hours
- Standard hours based on the type of position – default 35
- Current standard hours from employee’s schedule (proportional if split)
Job grade and step
- Used to calculate merit increase
- “None” if no value in HR
Accounts
- PeopleSoft values preceded by LA_

**FTE**
- Total annual hours worked (actual + forecast) / standard hours for the position
Note: FTE in FY15 8 Month Review
- FTE by employee above is calculated using hours worked beginning with the 2nd October pay from the PeopleSoft HR system.
- Total FTE for the year includes hours worked by all employees from May through the 1st October pay from the legacy system. The legacy FTE total has been loaded into Hedge.
- Details of the legacy FTE total by employee are available on request.

Data loaded from PeopleSoft HR:
- Read only information by employee imported from PeopleSoft HR at the beginning of the budget process plus benefit rates and merit increases based on assumptions approved by the Budget Committee

Data calculated by / entered in Hyperion:
- Stipend dates - Entered by users on Form 04. EXISTING EMPLOYEES - INPUT
- Benefit rate - From benefit tables based on calculated annual salary
- Merit increases - Based on current collective agreements / approved assumptions

TIP: Use this function for extensions. For an earlier end date adjust hours instead.

**FTE**
- Total annual hours worked (actual + forecast) / standard hours for the position

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- Total FTE for the year includes hours worked by all employees from May through the 1st October pay from the legacy system. The legacy FTE total has been loaded into Hedge.
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Enter forecast in Labour Planning forms

3. Enter changes

Form 02. NEW EMPLOYEES - INPUT
- IMPORTANT: Lines must be entered in order, i.e. NEW_EMPLOYEE_02 should not be entered if NEW_EMPLOYEE_01 is blank.
- Merit increases are not calculated for new employees in the first year.
- Current standard hours input on this form pre-populate all months between the start and end dates. Forecast hours may be adjusted on Form 05. LABOUR HOURS INPUT.
- After the record has been submitted, the calculated benefit, merit increase, and FTE may be viewed on Form 03. NEW EMPLOYEES - READ.

Form 04. EXISTING EMPLOYEES - INPUT
- Hourly rate adjustments are effective immediately.
- Stipend rate per pay is loaded with pre-population and may be adjusted here.
- Dates are not loaded with pre-population and may be entered here.

*Copy employee
- May be run on any form displaying existing employee.
- May be run to copy to:
  - Type (On-Going or One-Time)
  - Department
  - Program
  - Fund
  - Version (Working, What-If)

NOTE: Employee record is copied but hours and stipend are not populated. These must be entered in the form after the copy is complete.
Enter forecast in Labour Planning forms

3. Enter changes (continued)

Form 05. LABOUR HOURS INPUT and Form 06. LABOUR OVERTIME HOURS INPUT

Hours are entered separately in all years

- Double click (+) to expand months
- Double click (-) to collapse months
- All programs with active employees are displayed
- All existing and new employees are displayed
- Actual hours worked are shown in closed months. For FY15 this will be the 2nd October pay
- Regular hours are forecast using pay weeks in the month (including year-end accrual) and current standard hours on employee's schedule from PeopleSoft HR.
- Overtime hours must be forecast manually. Salary is calculated using 1.5x hourly pay rate.

Expand TOTAL HOURLY to show pay rate used each month

- Total annual budget from all sources (regular and overtime hours in TOTAL SALARY)
- Actual salary and benefits are shown in closed months (regular, stipend and overtime all in TOTAL SALARY)

Enter by month or annual total

- Total including hedge appears in Opex budget
- If the account to be hedged does not appear, right click in the form and select:
  Smart View > Unsuppress Labour Account for Hedge

Form 07. HEDGE SALARIES INPUT

- A hedge may be used to adjust salary and benefit expense, for example if the benefits calculated using the rate in the assumptions is not accurate. FTE’s are not affected.
- Fund, Department and Program may be viewed at a roll-up level. Entry is done at the lowest level.

NOTE: For closed months, the account total equals actual expense in GL. The hedge is the difference between total by employee and account total. For FY15 details by employee are not available from HR until the 2nd October pay.
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Enter forecast in Labour Planning forms

4. Review summary forecast

Form 08. LABOUR BUDGET SUMMARY BY ACCOUNT
- Displays expense and FTE budget for all types and years by summary level account, including hedge. May be requested at either the individual department level or any roll-up level.

Form 09. LABOUR BUDGET BY EMPLOYEE AND ACCOUNT
- Displays details of employees and hedge included in expense budgets by account for all years by month.
- NOTE: For closed months, the account total equals actual expense in GL. The hedge is the difference between total by employee and account total. For FY15 details by employee are not available from HR until the 2nd October pay.

Form 10. LABOUR BUDGET BY EMPLOYEE AND ACCOUNT
- Displays details of employees included in FTE’s by account for all years. Includes the total of On-Going and One-Time FTE’s.

Note: FTE in FY15 8 Month Review
- FTE by employee is calculated using hours worked beginning with the 2nd October pay from the PeopleSoft HR system.
- Total FTE for the year includes hours worked by all employees from May through the 1st October pay from the legacy system. The legacy FTE total has been loaded into Hedge.
- Details of the legacy FTE total by employee are available on request.