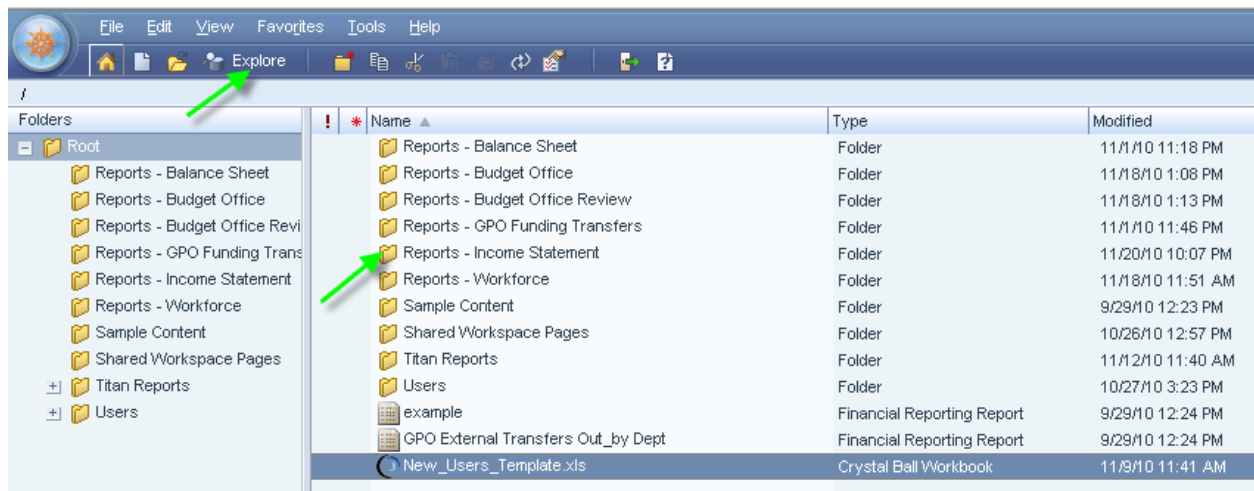


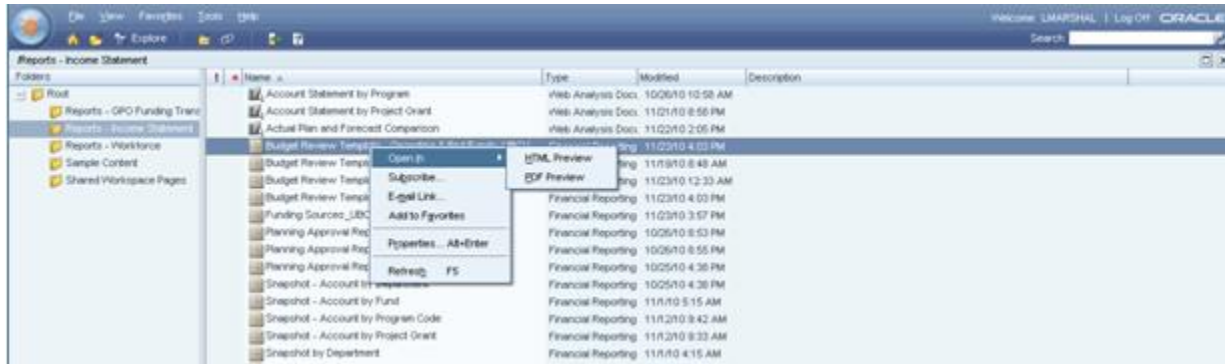
## Hyperion Planning – Running Report for Budget Review Meeting

1. Before starting please ensure you have completed the initial setup including turning on your POV for Financial Reporting as described at:  
<http://www.it.ubc.ca/projects/strategicprojects/titanatlas/budget.html>
2. The report is located in the Reports-Income Statement Folder
  - a. From Hyperion, click on Explore
  - b. Open the Reports – Income Statement Folder

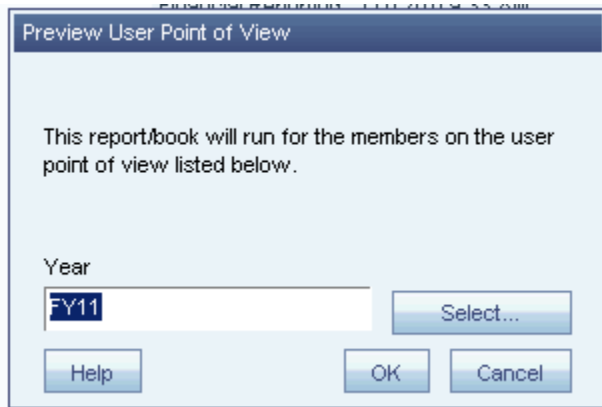


3. From this folder select a report beginning with “Budget Review Template”
  - a. Okanagan campus
    - i. Budget Review Template – Operating Fund\_UBCO
    - ii. Budget Review Template – Operating Fund\_All Depts  
Unless otherwise instructed, Okanagan units will use a.(i)
  - b. Vancouver campus
    - i. Budget Review Template – Operating and End Funds\_UBCV
    - ii. Budget Review Template – Operating Fund\_UBCV  
Unless otherwise instructed, Vancouver units will use b.(i)

4. Right-click on the required report and select Open in HTML.



5. In the first pop-up window, enter FY11 and click OK



6. This will open a new window. Click on the magnifying glass to search for your unit. Repeat for each box (there is one box on the Okanagan template (a) and 3 boxes on the Vancouver template (b)).

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

Prompt	Selection	Type	Source
SELECT Dept from UBCO:	UBCO	Report	Report: Budget Review Template - Operating Fund_UBCO Grid: Grid1

Buttons: Help, OK, Cancel, Reset



a.

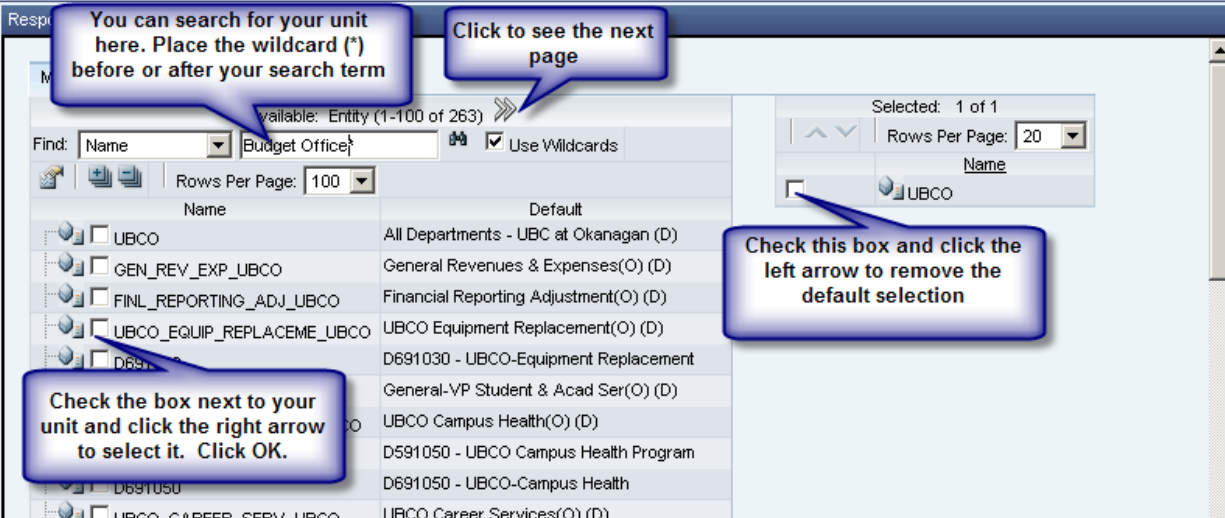
The following prompts have been defined in the report. You may use the default values shown, or select other members.


Prompt	Selection	Type	Source
SELECT Dept from President:	PRESIDENT	Report	Report: Budget Review Template - Operating_President_END Grid: President
SELECT Dept from UBCV:	UBCV	Report	Report: Budget Review Template - Operating_President_END Grid: UBCV
SELECT Dept from UBCO:	UBCO	Report	Report: Budget Review Template - Operating_President_END Grid: UBCO


Buttons: Help, OK, Cancel, Reset

b.

7. This window allows you to select your unit:
  - a. Find and select your unit (Unit names are consistent with the All\_DeptIDs tree in FMS)
  - b. Inserting an asterisk "\*" at the beginning and end of your search criteria will help you find your unit as it represents a wild card for the search engine.
  - c. Click the binoculars to show the search results, check the applicable unit(s).
  - d. Once you've made your selection use the right arrows  to make your selection.
  - e. In the Selected column, check the default value (e.g. President, UBCV or UBCO). Click the left arrow  to remove it from the selected units..
  - f. Review the Selected column only contains Unit(s) for this template.
  - g. Go to the bottom click OK to accept the member selection.



available: Entry (1-100 of 263) 

Find: Name Budget Office   Use Wildcards

Rows Per Page: 100

Name	Default	Selected
<input type="checkbox"/> UBCO	All Departments - UBC at Okanagan (D)	<input type="checkbox"/>
<input type="checkbox"/> GEN_REV_EXP_UBCO	General Revenues & Expenses(O) (D)	<input type="checkbox"/>
<input type="checkbox"/> FINL_REPORTING_ADJ_UBCO	Financial Reporting Adjustment(O) (D)	<input type="checkbox"/>
<input type="checkbox"/> UBCO_EQUIP_REPLACEME_UBCO	UBCO Equipment Replacement(O) (D)	<input type="checkbox"/>
<input type="checkbox"/> D691030	D691030 - UBCO-Equipment Replacement	<input type="checkbox"/>
<input type="checkbox"/> D691050	General-VP Student & Acad Ser(O) (D)	<input type="checkbox"/>
<input type="checkbox"/> D691050	UBCO Campus Health(O) (D)	<input type="checkbox"/>
<input type="checkbox"/> D691050	D591050 - UBCO Campus Health Program	<input type="checkbox"/>
<input type="checkbox"/> D691050	D691050 - UBCO-Campus Health	<input type="checkbox"/>
<input type="checkbox"/> UBCO_CAREER_SERV_UBCO	UBCO Career Services(O) (D)	<input type="checkbox"/>

Selected: 1 of 1  
 Rows Per Page: 20  
 Name  
 UBCO


8. Confirm your selection and press OK

Respond to Prompts

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

Prompt	Selection	Type	Source
SELECT Dept from UBCO:	<input type="text" value="UBCO_BUDGET"/>	Report	Report: Budget Review Template - Operating Fund_All Depts Grid: Grid1

Help OK Cancel Reset



9. Your report will open. You can print the report or export it to Excel, Word and Powerpoint, or save as a PDF.



THE UNIVERSITY OF BRITISH COLUMBIA

Budget Review Template -  
Operating Fund\_All Depts

UBCO\_BUDGET

	2009/10	2010/11	2011/12
	Actuals	Forecast	Plan
	Approved	Working	Working
GPO FUNDING ALLOCATION	68,403	77,493	77,493
GPO REVENUES	0	0	0
FEE FOR SERVICE	0	0	0
CONTINUING STUDIES	0	0	0
<b>REVENUES</b>	<b>68,403</b>	<b>77,493</b>	<b>77,493</b>
SALARIES			
FACULTY_SALARIES	0	0	0
SESSIONAL_SALARIES	0	0	0
STAFF_SALARIES	67,953	0	0
STUDENT_SALARIES	0	0	0
BENEFITS	0	0	0
TRAVEL	450	267	267
<b>EXPENSES</b>	<b>68,403</b>	<b>267</b>	<b>267</b>
<b>Surplus (Deficit)</b>	<b>0</b>	<b>77,226</b>	<b>77,226</b>
CFWD OPER - BEGINNING (data)	0	0	77,226
CFWD OPER - ENDING (calculated)	0	77,226	154,452
<b><u>FOR INFORMATION ONLY</u></b>			
CFWD OPER - BEGINNING (calculated)	0	0	77,226