Hyperion Planning – Running Report for Budget Review Meeting

 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
 - 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
 - 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.

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Reports - Income Statement			G
Fokders	t A Name A	Type Modified Description	
- D Rout	Account Statement by Program	Web Analysis Coci, 10/26/10 10:58 AM	
D Reports - GPO Punding Trane	Account Statement by Project Orant	Web Anelysis Doc. 11/21/10/8:55 PM	
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C Sample Content	Dudget Review Temps Code In	HTM. Preview Brg 11/1910/648 AM	
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	Strepshot - Account by Fund	Financial Reporting 11/1/10/515 AM	
	Shepshot - Account by Program Code:	Financial Reporting 11/12/10/8/42 AM	
	Trapphot - Account by Project Onwit	Financial Reporting 11/12/10/8/33 AM	
	Snepthol by Department	Financial Reporting 11/1/10 4:15 AM	

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

	104 1111 2111 <u>9 55 200</u>
Preview User Point of View	
This report/book will run for point of view listed below.	the members on the user
Year	
FY11	Select
Help	OK Cancel

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).

Prompt	Selection		Туре	Source
SELECT Dept from UBCO:	UBCO	<u>A</u>	Report	Report: Budget Review Templat Operating Fund_UBCO Grid: Grid1
Help				OK Cancel
pond to Prompts				
pond to Prompts The following prompt	is have been defined in the report.	You may use the default va	lues shown, or se	ect other members.
pond to Prompts The following prompt Prompt	ts have been defined in the report. Y Selection	You may use the default va	ilues shown, or se Type	ect other members. Source
pond to Prompts The following prompt Prompt SELECT Dept from President:	Is have been defined in the report. Selection PRESIDENT	You may use the default va	ilues shown, or se Type Report	ect other members. Source Report: Budget Review Temp Operating_President_END Grid: President
pond to Prompts The following prompt SELECT Dept from President: SELECT Dept from UBCV:	Is have been defined in the report. Selection PRESIDENT UBCY	You may use the default ve	ilues shown, or se Type Report Report	ect other members. Source Report: Budget Review Temp Operating_President_END Grid: President Report: Budget Review Temp Operating_President_END Grid: UBCV
Spond to Prompts The following prompt SELECT Dept from President: SELECT Dept from UBCV: SELECT Dept from UBCC:	ts have been defined in the report. Selection PRESIDENT UBCY	You may use the default ve	ilues shown, or se Type Report Report Report	ect other members. Source Report: Budget Review Temp Operating_President_END Grid: President Report: Budget Review Temp Operating_President_END Grid: UBCV Report: Budget Review Temp Operating_President_END Grid: UBCO
spond to Prompts The following prompt SELECT Dept from President: SELECT Dept from UBCV: SELECT Dept from UBCO: Help	Is have been defined in the report. Selection PRESIDENT UBCY UBCO	You may use the default ve	ilues shown, or se Type Report Report Report	ect other members. Source Report: Budget Review Temp Operating_President_END Grid: President Report: Budget Review Temp Operating_President_END Grid: UBCV Report: Budget Review Temp Operating_President_END Grid: UBCO
Spond to Prompts The following prompt Prompt SELECT Dept from President: SELECT Dept from UBCV: SELECT Dept from UBCC: Help	ts have been defined in the report. Selection PRESIDENT UBCY UBCO	You may use the default ve	ilues shown, or se Type Report Report Report	ect other members. Source Report: Budget Review Temp Operating_President_END Grid: President Report: Budget Review Temp Operating_President_END Grid: UBCV Report: Budget Review Temp Operating_President_END Grid: UBCO

- 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.



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 SELECT Dept from UBCO:	Selection UBCO_BUDGET	A	Type Report	Source 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.

UBC

a place of mind

THE UNIVERSITY OF BRITISH COLUMBIA 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	
REVENUES	68,403	77,493	77,493	
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	
EXPENSES	68,403	267	267	
Surplus (Deficit)	0	77,226	77,226	
CFWD OPER - BEGINNING (data)	0	0	77,226	
CFWD OPER - ENDING (calculated)	0	77,226	154,452	
FOR INFORMATION ONLY				
CFWD OPER - BEGINNING (calculated)	0	0	77,226	