Logging into Hyperion Planning Application

Contents

Supported Browsers

Users can access the Hyperion Planning Application through the below browsers:

- Mozilla Firefox ESR 38 - requires installation of *Remote XUL Manager* (instructions included below) - Recommended browser by Oracle
- Internet Explorer 11
- Google Chrome version 29 or newer – **Simplified Interface only**

Working in the Planning Application:

In Mozilla go to the below link:
https://ebudget-vcu1838.pbcs.us2.oraclecloud.com/workspace

For Google Chrome users use this link for Simplified Interface:
https://ebudget-vcu1838.pbcs.us2.oraclecloud.com/HyperionPlanning

Your username is your work email address, and type the password you created. If this is your first time logging into Hyperion, use the temporary password that was provided in the email from Oracle. You will be prompted to change your password. Finally, type in the **identity domain** is **vcu1838.**
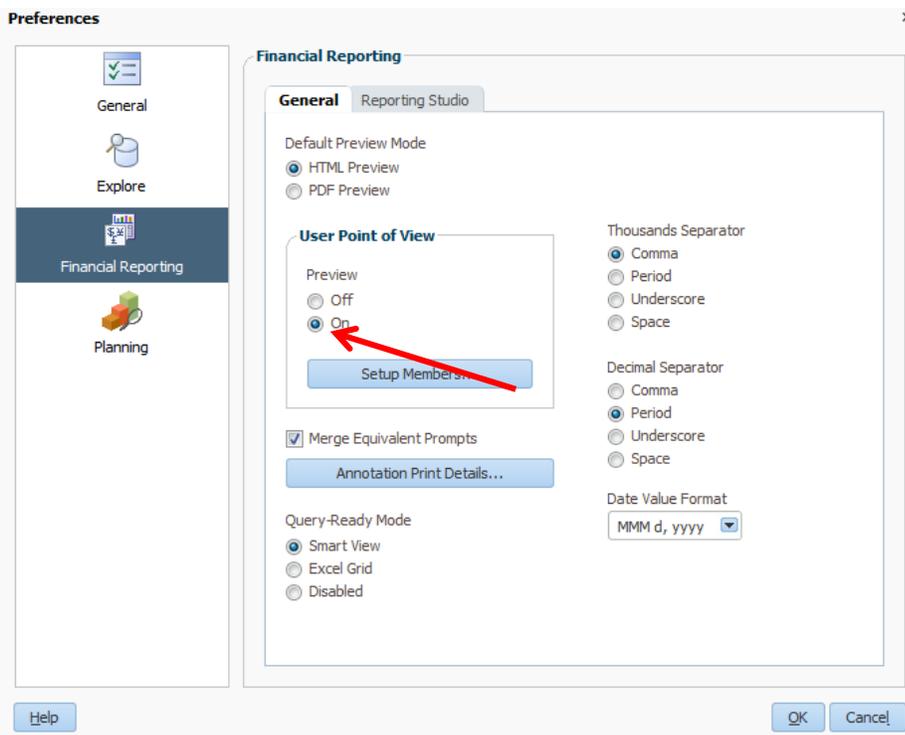
Upon successfully logging into Hyperion, open preferences:
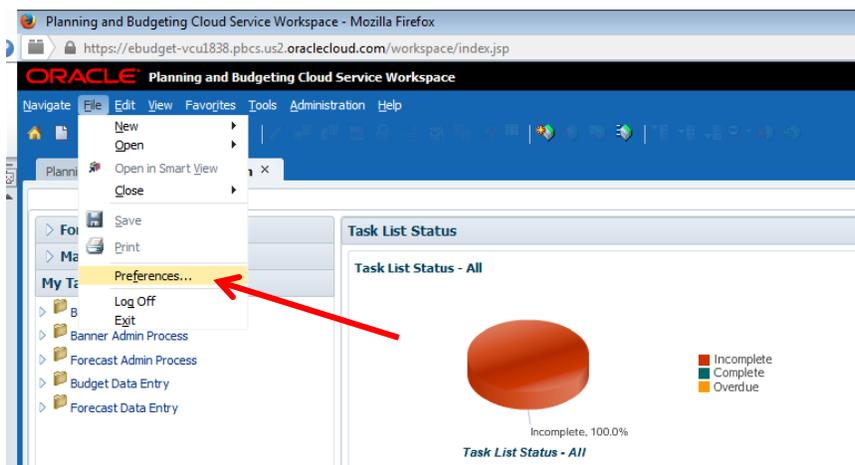
Click on Financial Reporting on the left panel of the pop up window:
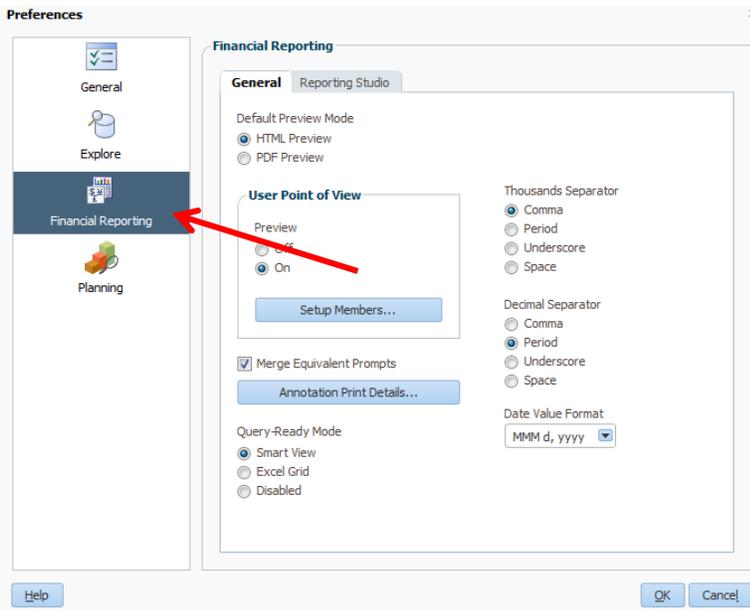
In the box that says "User Point of View," toggle this option to "On" and click OK.


All of the above steps only have to be completed once. Going forward, you simply login and begin using the system. The following will detail running reports in the Planning Application.

Running Reports in the Planning Application

Reports can be run in two different ways: through the standard interface or the simplified interface. I will show both, but please keep in mind that the standard interface is being discontinued at the end of 2015.
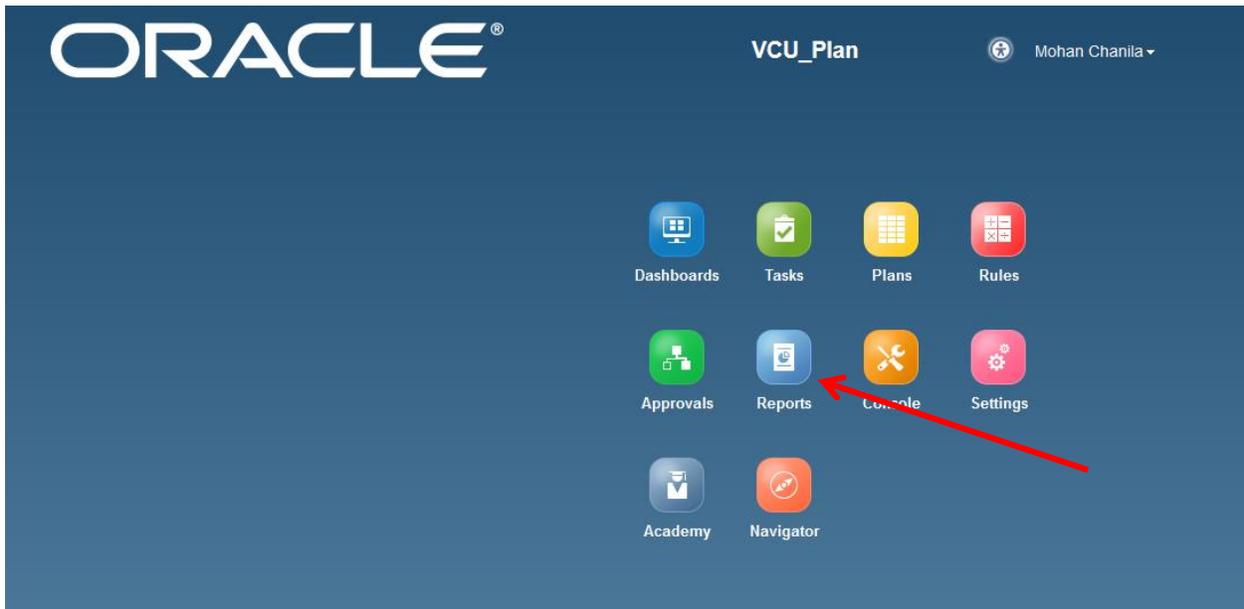
Simplified Interface:

Upon logging into Hyperion, the Planning Application will open and you should see a screen like this below. Click on the Planning Administration tab in the top left.
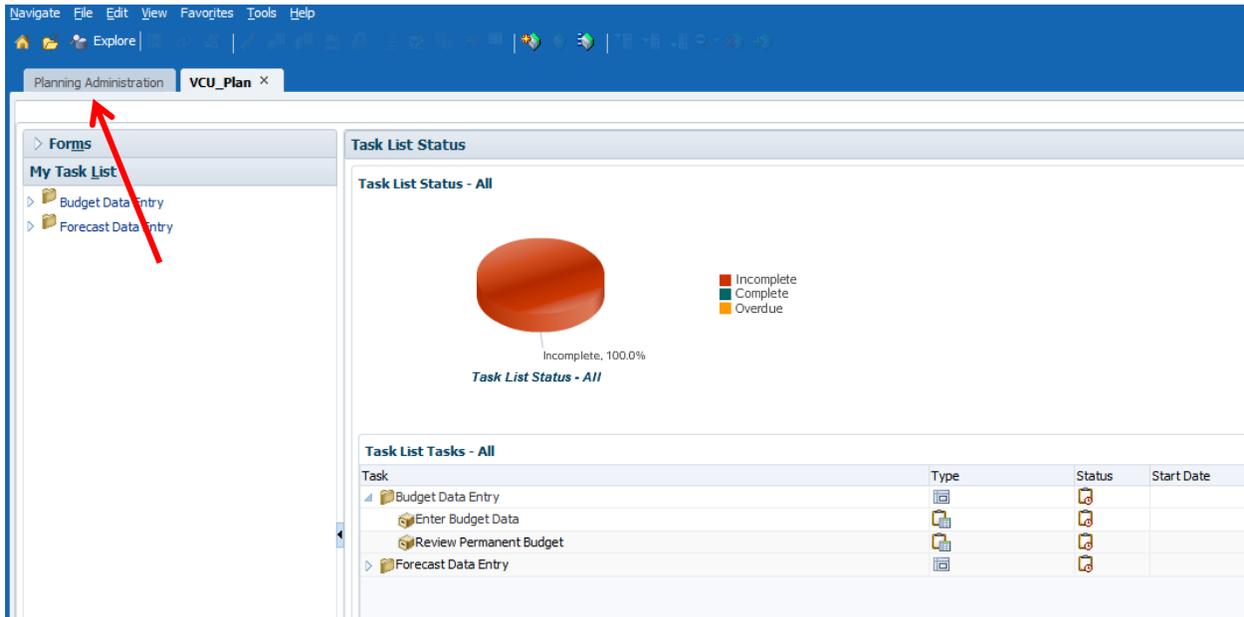
Click the Simplified Interface:
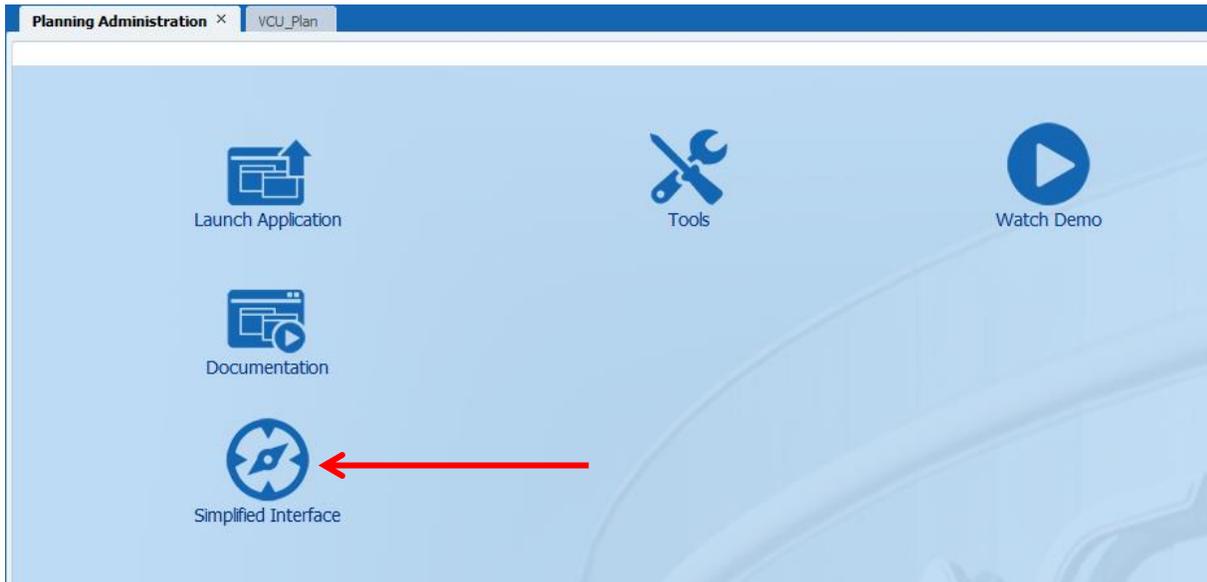
The Simplified Interface will open showing 10 icons. Click on the Reports icon.

The list of available reports will populate which can be run in HTML format and PDF format. This is up to user preference as both versions will populate the same report. I will be using HTML for training purposes. At the end of this document **(PAGE 15)** details each report, explaining what data populates.

We will use the "Task Force Demo V2-Chart" for this example. On the right you will see the HTML or PDF icon. Click HTML.
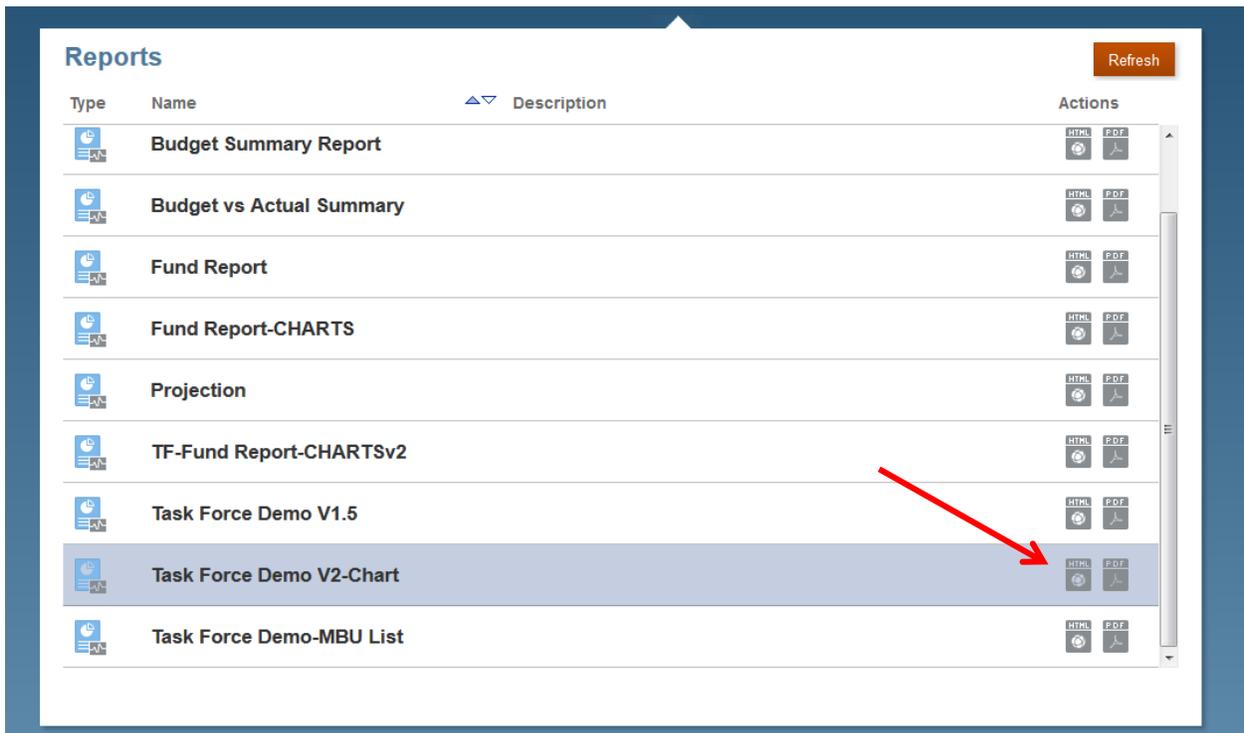
A new window will open showing various fields that need to be populated to run the report. Depending on the type of report, all or one of the below fields (detail of each shown) will be displayed.

1. **Years**- this is the <u>**fiscal**</u> year. Hyperion currently has historical fiscal years 2013, 2014.
2. **Scenario**- these fields are permanent budget, current budget, actuals, encumbrances, and adopted budget
3. **Version**- this is a system attribute. For the time being, we will only be using "Working"
4. **University**- this is the organization structure which matches Banner
5. **Measures**- data will be pulled in one of three ways based on your selection: Year to Date (YTD), Quarter to Date(QTD), or Month to Date (MTD)
6. **Fund Type**-like Banner, indexes have a specific fund type, which is reflected here
7. **Program**- like Banner, indexes have a specific program type, which is reflected here
8. **Account**- like Banner, data is booked to specific accounts. This is reflected here
9. **Period**- this is the **fiscal** month of activity

This report requires you to select the period, years, version, measures, and program. Next to each field there is an icon. Starting with Period, click this icon.

Fund Report-CHARTS

Period		University	
Years		Measures	
Version		Program	

A new dialogue box will open where you can choose the specific period. Let's look at May, or FP11. Click Year Total. You will notice the fiscal periods will populate to the right. In the grey box next to FP11, check that box. Finally, select OK in the top right.
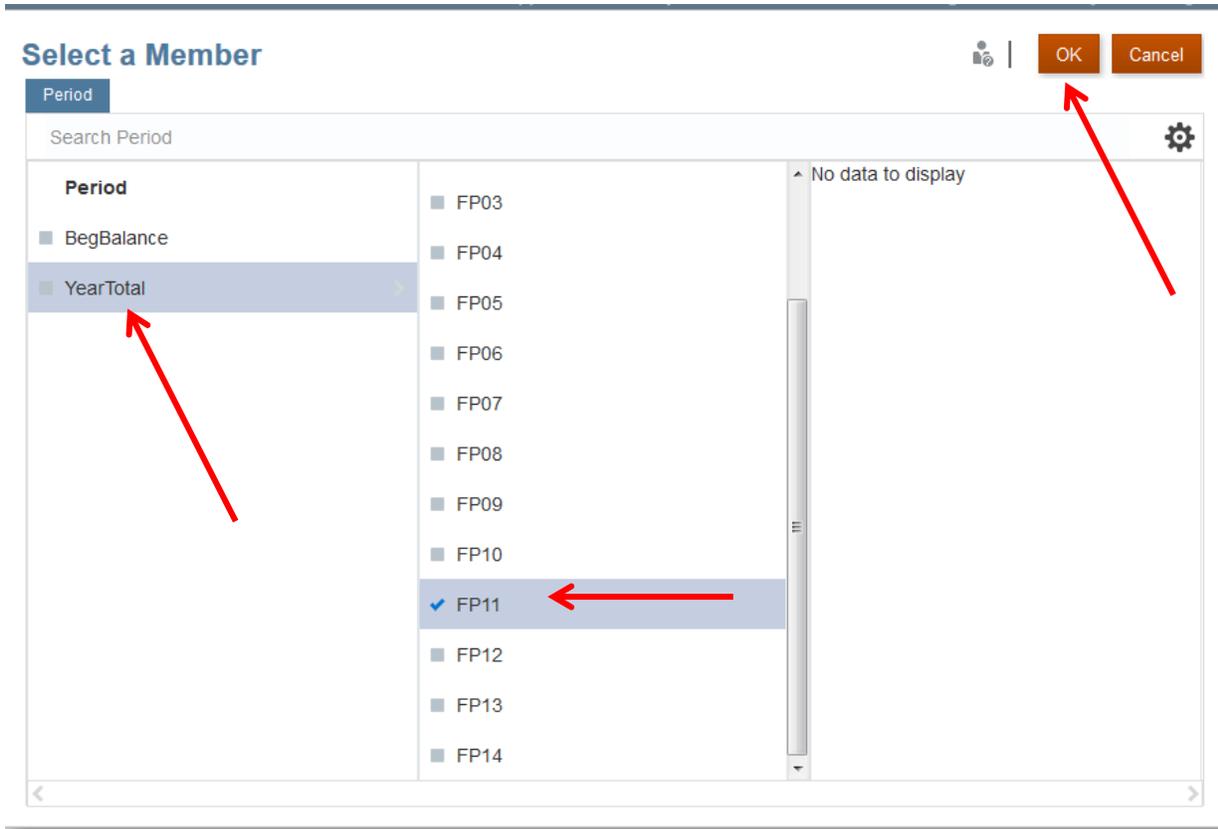
NOTE: Selecting YearTotal does not report a valid data point. You must select a specific month because data is loaded Year to Date.

AS A NOTE, if you would prefer to see the names as opposed to the IDs, click the gear on the right. From the drop down select "Show Alias"
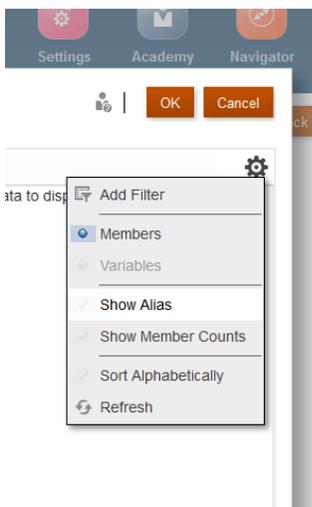
Now you should see the names of the months instead of FP11

Perform the same exercise for Years, Version, Measures, and Program.

- **Years- FY15**

Select a Member

Years

Search Years

Years
■ FY13
■ FY14
■ FY15
✔ FY16
■ FY17
■ FY18
■ FY19
■ FY20

- **Version- Working**

Select a Member

Version

Search Version

Version
■ Initial
✔ Working
■ Submitted_Requests

- **University I140 (School of Nursing)**

Select a Member

University I139	
Search University	
I16	
▪ I134	>
▪ I135	>
▪ I136	>
▪ I138	>
✔ I139	>
▪ I140	>
▪ I141	>
▪ I143	

- **Measures- YTD**

Select a Member

Measures	
Search Measures	
Measures	
✔ YTD	
▪ QTD	
▪ MTD	

- **Program- Total Program**

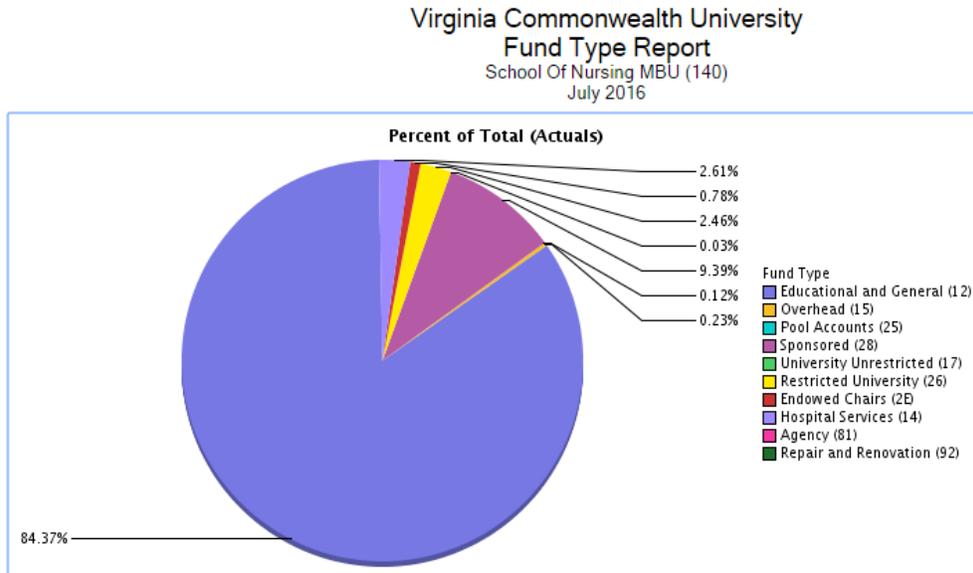# Select a Member

Program	
Search Program	
Program	
▪ Total Program	>

When all fields have been populated, click Continue. A new tab or window will open depending on your browser settings showing the report:


Virginia Commonwealth University
Fund Type Report
School Of Nursing MBU (140)
July 2016

Percent of Total (Actuals)

- 2.61%
- 0.78%
- 2.46%
- 0.03%
- 9.39%
- 0.12%
- 0.23%

84.37%

Fund Type
- Educational and General (12)
- Overhead (15)
- Pool Accounts (25)
- Sponsored (28)
- University Unrestricted (17)
- Restricted University (26)
- Endowed Chairs (2E)
- Hospital Services (14)
- Agency (81)
- Repair and Renovation (92)

Page: Total Expenses ▼

	Budget Permanent	Budget Current	Actual	Encumbrances	Current-Actual Difference	Net of Encumbrances
Educational and General (12)	10,220,341	10,558,413	1,256,841	7,346,083	9,301,572	1,955,489
Overhead (15)	(13,511)	124,544	3,428	31,558	121,116	89,558
Pool Accounts (25)	0	0	1,823	0	(1,823)	(1,823)

This report shows the Permanent Budget, Current Budget, Actual, and Encumbrances broken out by Fund Type for a single MBU (in this example it is School of Nursing). You can toggle between Total Expenses and Total Revenue using the drop down **(shown above)**. Had you decided to run this report as a PDF, every MBU would have populated (one per page).

Using the Standard Interface:

Upon logging into Hyperion, click on Explore in the top left corner:
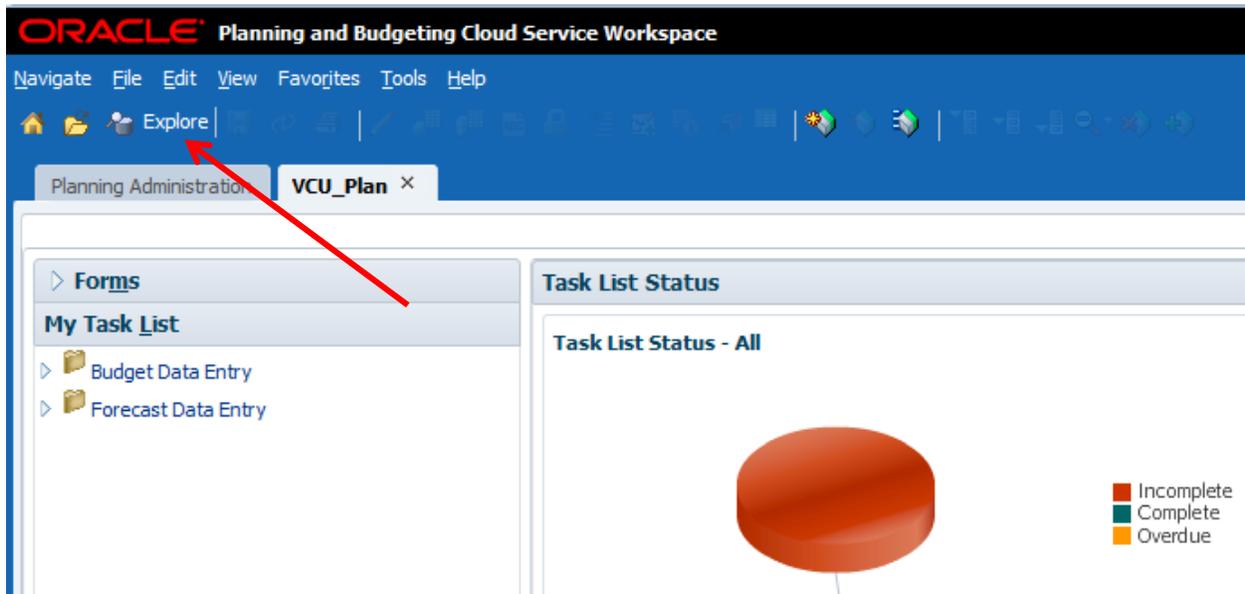
A list of folders will populate, all reports are located in the "Marc" folder. To find the report we used as an example for the simplified interface, open the folder within the Marc folder titled "**Fund Report - Charts**."

Double clicking on the report will populate a pop up box that shows the same fields as shown in the Simplified Interface.

Hitting the Select button will open another window where you will select the month, year, version, measures, and program. Hit Select next to Period. You will see arrows which will expand Period and Year Total. Choose FP11 or May.

Follow the same exercise for the remaining fields. When all fields are populated, click OK.

The report will open looking exactly as it did in the Simplified Interface. However, you will notice a bar located at the top of the report.
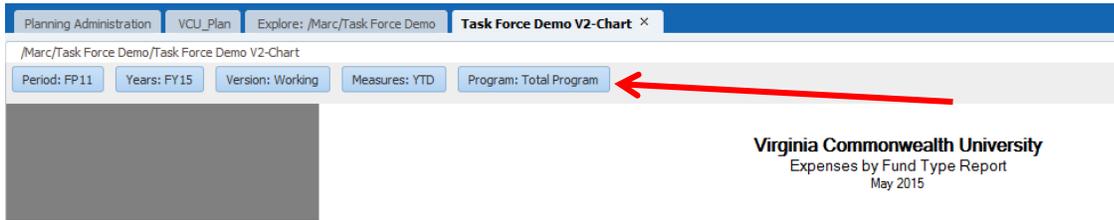
This heading will allow you to change the criteria you have chosen in each field. For example, clicking Period will open the window where you can select a new month to run in the report.

QUICK FACTS:

- All reports can be exported to Excel, Word, or PowerPoint. When the report runs, select File, then Export, and choose between the three options
- In fields, when running reports, as a shortcut, you can use to select members by typing the names. For example, if you wanted to select the College of Humanities and Sciences, you could type its ID number I119. Hyperion follows the exact same structure as Banner, so each number corresponds to an SML, MBU, Department, Sub-department, and Index. The only difference is each ID has an "I" before, so MBU 119 in Hyperion is I119.
- For a larger list of hints, tips, and tricks, please click here.

List of Reports:

1. **Budget Summary Report-** Report compares Actuals and Current Budget. Report populates the next level in the University structure (Selecting an MBU will populate all depts.

2. **Budget vs. Actual Summary-** You will be prompted to select University level. Report populates lower level of detail based on selection. You can toggle between scenarios when report runs. Report shows revenues and expenditures

3. **Fund Report-** Breakout of all scenarios (actual, current budget, permanent budget, and encumbrances) by fund type.

4. **Fund Report-CHARTS** Breakout of all scenarios (actual, current budget, permanent budget, and encumbrances) by fund type. Report includes a pie chart of the percent of fund type by actuals.

5. **MBU Personnel and Non-personnel Expenses-** Report breaks out actual personnel and non-personnel expenses by fund type. Report has a pie chart showing percent of total fund type.

6. **Org Structure Report-** You will be prompted to select University level. Report populates lower level of detail based on selection. You can toggle between scenarios when report runs. Must run at MBU level

7. **Revenue Expenditures Report-Org Detail-** You will be prompted to select University level. Report will populate lower level of detail based on selection. Report shows revenues and expenditures detailed by fund type.