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Setting Preferences

**Step 1**
Complete the steps found in the [Internet Browser Setup Manual for Hyperion](#).

**Step 2**
Go to [my.fsu.edu](http://my.fsu.edu), login with your FSU credentials. Click the HYP-Budget link and login with your FSU credentials.

**Step 3**
Click File then click Preferences.
**Step 4**
Click Financial Reporting and make changes, as necessary, so that your selections match the following:

Click OK when you are finished.
Data Validation Messages

Data validation messages are put in place to warn Budget Preparers of possible errors and to ensure an accurate budget.

If your entry column(s) or account(s) is highlighted, a data validation message will also appear meaning action may be required. Review the message by clicking on the Data Validation Messages hyperlink.

Make changes as necessary and save your entry.

The following page includes a complete list of data validation messages and their solution.
<table>
<thead>
<tr>
<th>Forms</th>
<th>Color</th>
<th>Highlighting - Column/Cell</th>
<th>Issue</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>E&amp;G</td>
<td>Red</td>
<td>Column</td>
<td>Department/fund combination selected does not have an E&amp;G allocation</td>
<td>Select the correct department/fund combination.</td>
</tr>
<tr>
<td>E&amp;G</td>
<td>Yellow</td>
<td>Cell</td>
<td>Total non-salary fund allocation remaining ≠ zero</td>
<td>Adjust your budget entry so that the Total Non-Salary Fund Allocation Remaining = Zero.</td>
</tr>
<tr>
<td>Carryforward</td>
<td>Orange</td>
<td>Column</td>
<td>No current year actuals</td>
<td>Verify the combination selected is accurate. Change the department/fund as necessary. Proceed with entering a budget if this is a new department/carryforward fund combination with no history. 1</td>
</tr>
<tr>
<td>Carryforward</td>
<td>Yellow</td>
<td>Cell</td>
<td>Budget &gt; estimated July 1 available balance</td>
<td>Verify that your budget entry is correct. 2</td>
</tr>
<tr>
<td>Carryforward</td>
<td>Red</td>
<td>Cell</td>
<td>Total expenditures &lt; $2</td>
<td>Verify that your budget entry is correct. 2</td>
</tr>
<tr>
<td>Non-E&amp;G</td>
<td>Orange</td>
<td>Column</td>
<td>No current year actuals</td>
<td>Verify the combination selected is accurate. Change the department/fund as necessary. Proceed with entering a budget if this is a new department/non-E&amp;G fund combination with no history. 1</td>
</tr>
<tr>
<td>Non-E&amp;G</td>
<td>Yellow</td>
<td>Cell</td>
<td>Budget &gt; total of estimated fund balance + revenues</td>
<td>Verify that your budget entry is correct. 2</td>
</tr>
<tr>
<td>Non-E&amp;G</td>
<td>Red</td>
<td>Cell</td>
<td>Total expenditures &lt; $2</td>
<td>Verify that your budget entry is correct. 2</td>
</tr>
<tr>
<td>All</td>
<td>Red</td>
<td>Cell</td>
<td>OCO Budget &lt; $5,000</td>
<td>Since the University’s capitalization threshold is $5,000 for most tangible personal property, OCO budgets should typically be $5,000 or more. Verify that your budget is correct. 2</td>
</tr>
</tbody>
</table>

1 The highlighting and Data Validation Message will remain if you are entering budget for a new department/fund combination.

2 The highlighting and Data Validation Message will remain if your budget entry still meets the issue conditions, but is correct.
Accessing the Budget Entry Forms

**Step 1**
Go to [my.fsu.edu](http://my.fsu.edu), login with your FSU credentials. Click the HYP-Budget link and login with your FSU credentials.

![myFSU Links](image)

**Step 2**
Click the ALLFUND hyperlink on the home page.

![myFSU Dashboard](image)
**Step 3**
Expand Forms in the Form Folder pane.

**Step 4**
Click on Budget Managers to view the budget entry forms.
E&G Budget Entry

Step 1
Complete the steps in the Accessing the Budget Entry Forms section of this manual.

Click on the E&G Budget form in the side menu with the fund applicable to you.


**Step 2**
You can change the department ID, if necessary, by clicking the dropdown button.

You can search for your department ID by entering it in the Member field or by scrolling through the list.

Click on the department.

Click the go button to load the data for the selected department.

Note: If you are receiving a Data Validation Message, review the section on Data Validation Messages before proceeding.
**Step 3**
Enter your recurring non-salary E&G budget using one of the following options:
- Manually
- Allocate by Prior Year Budget
- Allocate by Prior Year Actuals

To allocate by prior year budget or actuals, right-click in any cell in the Budget Recurring column, select the allocation method you want, read the Launch Confirmation Message and click OK.

Your “Total Non-Salary Fund Allocation Remaining” should be $0.

**Step 4**
If a portion of your departmental budget is related to Cost Share, enter that amount on the Cost Share Amount row at the bottom of the form (use either column).

**Step 5**
Click the save button.
Step 6
To review your budget summary, right-click in any cell in either the Budget Recurring or the Budget Nonrecurring column and click Review Summary.

To return to the entry screen, click the hyperlink in the breadcrumbs.

Step 7
Repeat as necessary for all of your E&G departments before proceeding.

Step 8
Summary reports are available (see the Reports section of this manual), but may not be run until the day following your budget entry.
Carryforward Budget Entry

Step 1
Complete the steps in the Accessing the Budget Entry Forms section of this manual.

Before you can enter your budget, you must estimate your July 1 Available Balance.

Click on the Carryforward Balance Estimate form in the side menu with the fund applicable to you.

Note: You will not see all of these forms. The forms in your view will coincide with your designated access.
Step 2
You can change the department ID, if necessary, by clicking the dropdown button.

You can search for your department ID by entering it in the Member field or by scrolling through the list.

Click on the department.

Click the go button to load the data for the selected department.

Note: If no data loads after clicking the go button, that department may not be used with that Carryforward fund form. Verify your selections. Contact the Budget Office if you believe this is an error.
**Step 3**
Review the data.

Note that balances in benefits and staff rate, which are swept to the Central Reserve at June 30th, are not included in your E&G Budget, E&G Encumbrances, E&G Expense or E&G Available Balance.

Enter your estimated net change through June 30.

- If you anticipate that your Total Available Balance will decrease between 3/31 and 6/30, the amount should be negative:

<table>
<thead>
<tr>
<th>Total Available Balance</th>
<th>17,500</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>ESTIMATE NET CHANGE THROUGH JUNE 30</td>
<td>(16,500)</td>
</tr>
</tbody>
</table>

- If you anticipate that your Total Available Balance will increase between 3/31 and 6/30, the amount should be positive:

<table>
<thead>
<tr>
<th>Total Available Balance</th>
<th>17,500</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>ESTIMATE NET CHANGE THROUGH JUNE 30</td>
<td>1,500</td>
</tr>
</tbody>
</table>

Click the save button when you are finished.
**Step 4**

Select the Carryforward Budget form with the same fund selected in Step 1 of this section.

The department ID on this form should be the same as the one selected in Step 2 of this section.

The Estimated July 1 Available Balance for your selected department carries over from Step 3 of this section.
**Step 5**
Enter your Carryforward budget.

**Step 6**
If a portion of your departmental budget is related to Cost Share, enter that amount on the Cost Share Amount row at the bottom of the form.

**Step 7**
Click the save button.

**Step 8**
To review your budget summary, right-click in any cell in the Budget Nonrecurring column and click Review Summary.

To return to the entry screen, click the hyperlink in the breadcrumbs.
Step 9
Repeat these steps as necessary for all of your Carryforward departments before proceeding.

Step 10
Summary reports are available (see the Reports section of this manual), but may not be run until the day following your budget entry.
Non-E&G Budget Entry

**Step 1**
Complete the steps in the [Accessing the Budget Entry Forms](#) section of this manual.

Before you can enter your budget, you must estimate your July 1 Fund Balance (Fund Balance = assets, less liabilities, excluding balances related to capital assets).

Click on the NonE&G 1. Fund Balance Estimate form in the side menu.
**Step 2**
You can change the department ID, if necessary, by clicking the dropdown button.

You can search for the department ID by entering it in the Member field or by scrolling through the list.

Click on the department.
Click the dropdown button to select the fund that corresponds to the department ID you selected.

You can search for the fund by entering it in the Member field or by scrolling through the list.

Click on the fund.

Click the go button to load the data for the selected department/fund.

Note: If no data loads after clicking the go button, the department/fund combo you selected is invalid or is new.

If this department/fund combo is new, continue to the next Step.

Contact the Budget Office if you believe this is an error.
Step 3
Review the data.

Enter your estimated net change through June 30.

- If you anticipate that your non-E&G Fund Balance will decrease between 3/31 and 6/30, the amount should be negative:

![Estimate Net Change Through June 30: (34,000)]

- If you anticipate that your non-E&G Fund Balance will increase between 3/31 and 6/30, the amount should be positive:

![Estimate Net Change Through June 30: 12,500]

Click the save button when you are finished.

Click OK.
**Step 4**
Click the NonE&G 2. Revenue Budget form in the side menu.

The department ID and fund on this form should be the same as the one selected in Step 2 of this section.

The Estimated July 1 Non-E&G Fund Balance for your selected department/fund carries over from Step 3 of this section.
**Step 5**
Enter your non-E&G Revenue budget.

Click the save button when you are finished.

Note: If you need budget on a non-operating cash transfer account, use the Hyperion Transfer Request Form located on the Budget Office website.

Note: If you are receiving a Data Validation Message, review the section on Data Validation Messages before proceeding.
Step 6
Click the NonE&G 3. Expense Budget form in the side menu.

The department ID and fund on this form should be the same as the previous steps in this section.

The Estimated July 1 Non-E&G Fund Balance and Total Revenue and Transfers In for your selected department/fund carry over from the previous steps in this section.
Step 7
Enter your non-E&G Expense budget.

Step 8
If a portion of your departmental budget is related to Cost Share, enter that amount on the Cost Share Amount row at the bottom of the form.

Step 9
Click the save button.

Step 10
To review your budget summary, right-click in any cell in the Budget (entry) column and click Review Summary.

To return to the entry screen, click the hyperlink in the breadcrumbs.

Step 11
Repeat as necessary for all of your non-E&G departments before proceeding.

Step 12
Summary reports are available (see the Reports section of this manual), but may not be run until the day following your budget entry.
Reports

Several reports have been developed to assist Budget Preparers with their budget entry and review. This section details each report.

Before proceeding, ensure you have completed the steps in the Setting Preferences section of this manual. Additionally, download the FR Report Entity/Fund Selection Guide. This guide will assist you with the formatting requirements for entity and fund selections (Entity = Division/School/Area/Department).

Use the following steps to open the report studio.

**Step 1**
From the Hyperion HomePage, click the Explore button.

**Step 2**
Expand ALLFUND in the Folders view pane.
**Step 3**
Click on Budget and Allocation Reports.

![Image of report studio](image)

There are two types of reports in the report studio:

1. **Standard Report**, which is designated with the symbol. There are three standard reports available:
   a. E&G Budget Request
   b. Carryforward Budget Request
   c. NonE&G Budget Request

2. **Book**, which is designated with the symbol. A book enables Budget Preparers to run multiple standard reports together without having to enter a fund. There are four books available:
   a. Budget Request for Carryforward
   b. Budget Request for E&G
   c. Budget Request for NonE&G (does not include 8xx funds)
   d. Budget Request for All Funds
Standard Reports

The functionality is the same for the following reports:

*E&G Budget Request*

*Carryforward Budget Request*

*NonE&G Budget Request*

**Step 1**
Right-click the name of the report you want to run.

**Step 2**
Hover over Open In and select PDF Preview.
Step 3
Enter the Entity and click OK.

Step 4
Check the box to Edit Member Names.
Step 5
Enter the fund in the Selection field. You can enter multiple funds by separating each fund with a comma (e.g., F110, F121). However, only enter funds that correspond to the report you are running (e.g., do not run F140 in the E&G Budget Request Report). Click OK. A PDF should open.

Step 6
Review your budget request(s).

Step 7
If you need to run the report for another Entity, click the following:
**Step 8**
Enter the Entity in the Name field and click the button.

![Preview User Point of View](image)

**Step 9**
The Entity you entered should be selected. Click OK. Click OK. A PDF should open.

![Preview User Point of View](image)
Books

The functionality is the same for the following reports:

*Budget Request for Carryforward*
*Budget Request for E&G*
*Budget Request for NonE&G*

**Step 1**
Right-click the name of the book you want to run.

**Step 2**
Hover over Open In and select Complete Book in PDF.

**Step 3**
Enter the Entity and click OK. A PDF should open.

**Step 4**
Review your budget request(s).

---

Note:
Depending on the size of the Entity selected, the report may take several minutes.
**Step 5**
If you need to run the book for another Entity, click the following:

![Image of the myFSU interface with the Entity field highlighted]

**Step 6**
Enter the Entity in the Name field and click the button.

![Image of the Preview User Point of View window with the Name field highlighted]

Help | OK | Cancel
Step 7
The Entity you entered should be selected. Click OK. Click OK. A PDF should open.
**Budget Request for All Funds**

This report functions similar to the other books, but it allows the Budget Preparer to run E&G, Carryforward, and NonE&G together. However, you must have **all three** budget entities in order to run this report.

**Step 1**
Right-click Budget Request for All Funds.

**Step 2**
Hover over Open In and select Complete Book in PDF.

**Step 3**
Enter the Entity and click OK.
Step 4
Check all three Edit Member Names check boxes (highlighted in red).

Enter your E&G fund(s) (F110, F121, F210, F211) in the top Selection field (highlighted in blue).

Enter your Carryforward fund(s) (F140, F126, F240, F241) in the middle Selection field (highlighted in green).

Enter your NonE&G fund(s) in the bottom Selection field (highlighted in orange).

You can enter multiple funds by separating each fund with a comma (e.g., F110, F121).

Click OK. A PDF should open.

Step 5
Review your budget requests.
**Step 6**
If you need to run the book for another Entity, click the following:

![Entity filter example](image)

**Step 7**
Enter the Entity in the Name field and click the button.
Step 8
The Entity you entered should be selected. Click OK. Click OK. A PDF should open.
Hyperion Transfer Request Form Example

Hyperion Transfer Request
Request to budget a non-operating cash transfer for the FY 2016-2017 Operating Budget

You may submit multiple forms. The Hyperion Budget Preparer for the department listed on a line is required to approve that line. The total of Transfers Out and Transfers In must balance. Please contact the Budget Office if you are unsure who the Budget Preparer is for a particular department.

Transfer Out

<table>
<thead>
<tr>
<th>Department</th>
<th>Fund</th>
<th>Amount</th>
<th>Justification for Transfer</th>
<th>Budget Preparer Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>111000</td>
<td>320</td>
<td>5,000</td>
<td>To department 555000 / 320 to subsidize a training program.</td>
<td>Mary Alice Mills</td>
</tr>
<tr>
<td></td>
<td></td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>5,000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Transfer In

<table>
<thead>
<tr>
<th>Department</th>
<th>Fund</th>
<th>Amount</th>
<th>Justification for Transfer</th>
<th>Budget Preparer Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>555000</td>
<td>320</td>
<td>5,000</td>
<td>From 111000 / 320 for training program.</td>
<td>Corbin deNappi</td>
</tr>
<tr>
<td></td>
<td></td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>5,000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Email Form to Budget Office