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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>Form</th>
<th>Highlighting</th>
<th>Issue</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>E&amp;G</td>
<td>Peach (Column)</td>
<td>Department/fund combination selected does not have a non-salary E&amp;G allocation</td>
<td>Select the correct department/fund combination.</td>
</tr>
<tr>
<td>E&amp;G</td>
<td>Yellow (Cell)</td>
<td>Total non-salary allocation remaining ≠ zero</td>
<td>Adjust your budget entry so that the Total Non-Salary Allocation Remaining = Zero.</td>
</tr>
<tr>
<td>Carryforward</td>
<td>Orange (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 (Cell)</td>
<td>Budget &gt; total available for the budget year</td>
<td>Verify that your budget entry is correct. ²</td>
</tr>
<tr>
<td>Carryforward</td>
<td>Red (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 (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 (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 (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 (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>
<tr>
<td>E&amp;G Allocation Verification</td>
<td>Green (Cell)</td>
<td>Total non-salary allocation remaining ≠ zero</td>
<td>Adjust your budget entry so that the Total Non-Salary Allocation Remaining = Zero.</td>
</tr>
<tr>
<td>Carryforward Budget Variaton</td>
<td>Blue (Cell)</td>
<td>Department with estimated available budget and no budgeted expenditures</td>
<td>Very that you do not plan to spend anything on the department-fund combination next fiscal year.</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](image1)

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

![Enterprise Performance Management System Workspace, Fusion Edition](image2)
Step 3
Expand Forms in the Form Folder pane.

Step 4
Click on Budget Preparers 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.

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 by entering the department ID or department description in the Member field or by scrolling through the list.

Click on the department.

Click the go button to load the department/fund.
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 Allocation Remaining” should be $0.

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.

Click the save button when you are finished.

Step 4
To review your budget summary, click on the 03.03 E&G Summary tab.
Step 5
Repeat as necessary for all of your E&G departments before proceeding.

Step 6
Verify that you have entered the non-salary allocation for all of your E&G departments by clicking the E&G Allocation Verification form in the side menu.

You can change the fund, if necessary, by clicking the dropdown button, selecting the fund and clicking the go button.

Step 7
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.

Click on the Carryforward Budget 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 by entering the department ID or department description in the Member field or by scrolling through the list.

Click on the department.

Click the go button to load the department/fund.

Step 3
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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.
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 revenues and transfers in (budget you expect to receive between 4/1 and 6/30), if applicable:

Enter your estimated unencumbered expenses (e.g., upcoming travel to be paid this fiscal year that has no travel authorization yet) and estimated transfers out (budget you expect to transfer to another department between 4/1 and 6/30), if applicable:

Note: the amount entered in this field should be positive.

Enter your estimated budget year transfers in (additional budget you expect to receive during next fiscal year; e.g., OPS Health Insurance reimbursement from the Central Reserves), if applicable:

Click the save button when you are finished.

Step 4
Click on the 06.02 CF Entry tab.
Step 5
Enter your Carryforward budget.

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.

Click the save button when you are finished.

Step 6
To review your budget summary, click on the 06.03 CF Summary tab.

Step 7
Repeat these steps as necessary for all of your Carryforward departments before proceeding.
Step 8
Verify that you have entered the carryforward budget for all of your departments, as needed, by clicking the Carryforward Budget Verification form in the side menu.

![Forms in Budget Preparers](image)

You can change the fund, if necessary, by clicking the dropdown button, selecting the fund and clicking the go button.

Step 9
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.

Click on the NonE&G Budget Request form in the side menu.

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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 by entering the department ID or department description 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 department/fund.

**Step 3**
Review the data.

Enter your estimated revenues and transfers in (revenue you expect to receive between 4/1 and 6/30), if applicable:

<table>
<thead>
<tr>
<th>Current Year Estimates 4/1 - 6/30</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated Revenues and Transfers In</td>
</tr>
<tr>
<td>Estimated Unencumbered Expenses &amp; Transfers Out</td>
</tr>
</tbody>
</table>

Enter your estimated unencumbered expenses (e.g., upcoming travel to be paid this fiscal year that has no travel authorization yet) and estimated transfers out (revenue or cash you expect to transfer to another department between 4/1 and 6/30), if applicable:

<table>
<thead>
<tr>
<th>Current Year Estimates 4/1 - 6/30</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated Revenues and Transfers In</td>
</tr>
<tr>
<td>Estimated Unencumbered Expenses &amp; Transfers Out</td>
</tr>
</tbody>
</table>

Note: the amount entered in this field should be positive.

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.
Click the save button when you are finished.

**Step 4**
Click on the 08.02 NonE&G Revenue and Transfers In tab.

![NonE&G Budget Request](image)

**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](#).
**Step 6**
Click on the 08.03 NonE&G Expenses tab.

![NonE&G Budget Request](image)

**Step 7**
Enter your non-E&G Expense budget.

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.

Click the save button when you are finished.

**Step 8**
To review your budget summary, click the 08.04 NonE&G Summary tab.

![NonE&G Budget Request](image)

**Step 9**
Repeat as necessary for all of your non-E&G 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.

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Note: If you need budget on a non-operating cash transfer account, use the Hyperion Transfer Request Form located on the [Budget Office website](#).
Foundation Budget Entry

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

Click on the Foundation Budget (599) form in the side menu.

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.

The default fund is 599-Foundation Restricted Funds and does not need to be adjusted.

Click the go button to load the department/fund.

Step 3
Enter your Foundation Expense budget.

Click the save button when you are finished.

The Revenue budget (account 691100P-Budget Other Grants & Donation) should automatically populate with the “TOTAL EXPENDITURES” amount.

Step 4
To review your budget summary, click the Foundation Summary tab.

Step 5
Repeat as necessary for all of your Foundation departments before proceeding.

Step 6
Summary reports are available (see the Reports section of this manual), but may not be run until the day following your budget entry.
Reports

Operating budget reports are available in BI. To access these reports, you must have the role FSU_HYP_BI_REPORTS.

Similar to other reports in BI, information contained in the reports is as of the previous day, so you must wait until the day following your budget entry to see it reflected on these reports.

The Budget Office has developed two operating budget reports: E&G Budget Requests (contains E&G and Carryforward) and Non-E&G Budget Requests. To open these reports, go to: BI > Dashboards > HYP - Operating Budget Requests.

These reports function the same way, so the following can be used to navigate both.

**Step 1**
Change the prompts, as needed.

**Note:** Division is the only required prompt.

**Note:** The Fiscal Years prompt will default to the years populated in Hyperion. It is recommended to utilize the default.

Click Apply.

**Step 2**
Change the Level as needed.

Note: The Department Level Export tab is only on the E&G Budget Requests dashboard.
### Examples:

<table>
<thead>
<tr>
<th>Report Needed</th>
<th>Prompt Selection</th>
</tr>
</thead>
</table>
| Summary of entire Student Affairs Division, fund 110                          | Division: DIV SA - Student Affairs  
  School: (leave blank)  
  Area: (leave blank)  
  Department: (leave blank)  
  Fund: 110 - E&G General Revenue                                                                                           |
| Summary of entire College of Business, fund 110 and 140                       | Division: DIV AA Academic Affairs  
  School: BUS - College of Business  
  Area: (leave blank)  
  Department: (leave blank)  
  Fund: 110 - E&G General Revenue, 140 - E&G GR-Carryforward                                                                         |
| Summary of entire Chemical Engineering area, fund 140 and 241                 | Division: DIV AA Academic Affairs  
  School: ENG - College of Engineering  
  Area: 214 - Chemical Engineering  
  Department: (leave blank)  
  Fund: 140 - E&G GR-Carryforward, 241 - Engineering Carryforwardizr                                                        |
| Summary of department 227000, fund 110                                       | Division: DIV RS - Research  
  School: (leave blank)  
  Area: (leave blank)  
  Department: 227000  
  Fund: 110 - E&G General Revenue                                                                                           |

**Note:** These reports have two sections. The first section shows the results for the prompt selections. The second section subtotals the prompt selections. For example, if you run a report for department 046000, fund 110 and 140, the first section will include the budget request for 046000-110 and 046000-140. The second section will subtotal both budget requests.

**Step 3**
If you need to print the report, click the button in upper right corner of the page, hover over Print and select Printable PDF.
Hyperion Transfer Request Form Example

Hyperion Transfer Request
Request to budget a non-operating cash transfer for the FY 2017-2018 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>Corbin deNagy</td>
</tr>
<tr>
<td>0</td>
<td></td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>0</td>
<td></td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>0</td>
<td></td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>0</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>Mary Miller</td>
</tr>
<tr>
<td>0</td>
<td></td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>0</td>
<td></td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>0</td>
<td></td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>0</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