

2018

Hyperion - CoogPlan



University of Houston

Budget office

Table of Contents

	<u>Page</u>
1. How to log into COOGPLAN	2
2. CoogPlan Homepage	3
3. My Task List: 4 Folders:	3
1. Budget Cycle Activities	4
• Search and Enter Budgets	4
• Search for Positions or Employees	7
• Position Maintenance	10
2. Budget Cycle Inquiries	16
• Budget Balance Check	16
• Budget vs Actuals Inquiry	16
• Budget by Department with Graph	17
• Budget inquiry by Strategic Initiatives	17
• Budget inquiry by Strategic Initiatives with Account	17
• CoogPlan Refresh Status	17
3. Budget Reference Materials	18
4. View Historical Data	19
5. Report Section	20
• CoogPlan – Reports	20
• Budrpt - Reports	21
• CoogPlan Batch Reports	22
6. Other Video Links	23

Hyperion Planning Training

How to log into COOGPLAN



UNIVERSITY of **HOUSTON**

AccessUH

You logged off at 03/30/17 01:27:25 PM.

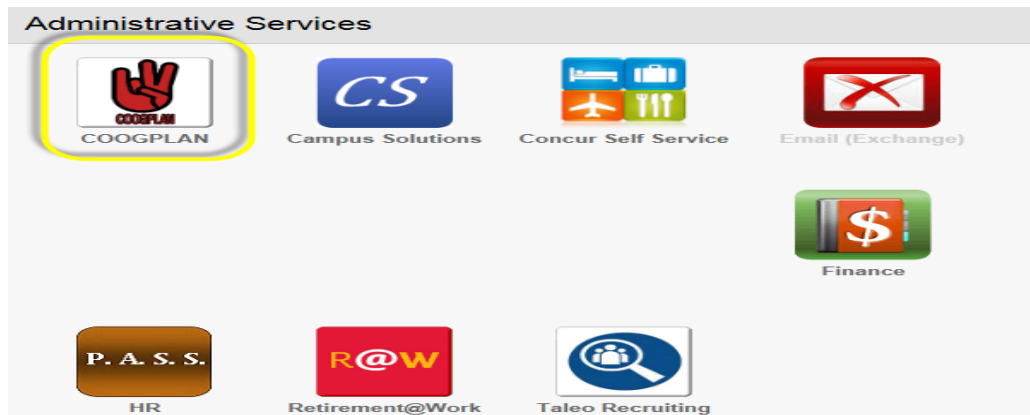
CougarNet Login myUH (PeopleSoft) Login

CougarNet ID: Don't know your CougarNet ID?

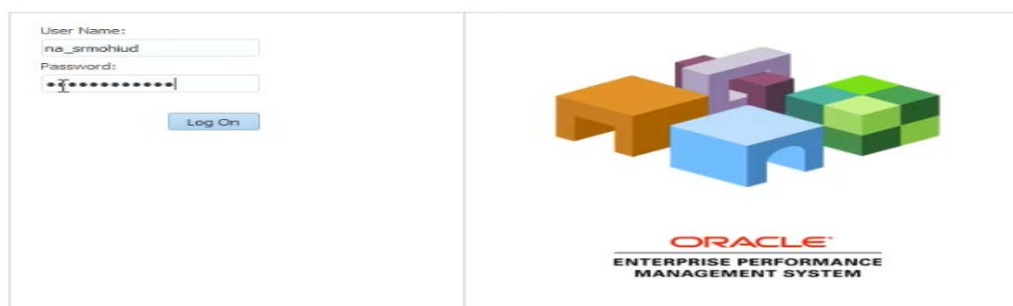
CougarNet Password: Change/Reset your CougarNet Password.

Login to AccessUH

Access through UH portal (www.access.uh.edu) authenticated by CougarNet ID.



Select COOGPLAN icon



User Name: ina_srmohiud

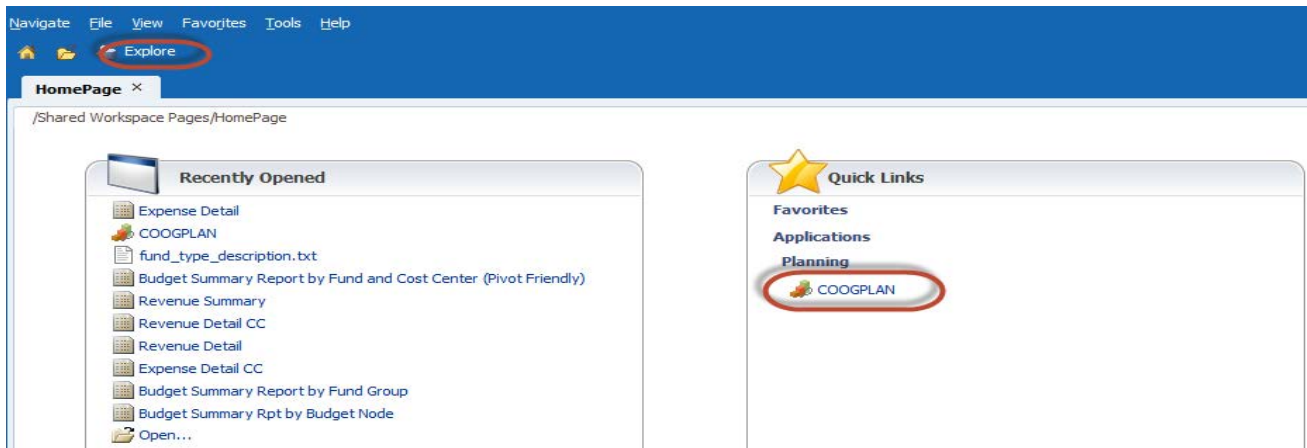
Password:

ORACLE
ENTERPRISE PERFORMANCE
MANAGEMENT SYSTEM

Log in once more

- [Logging into CoogPlan](#) - (How to log into COOGPLAN video link) – To open the link press Ctrl and click on the blue font

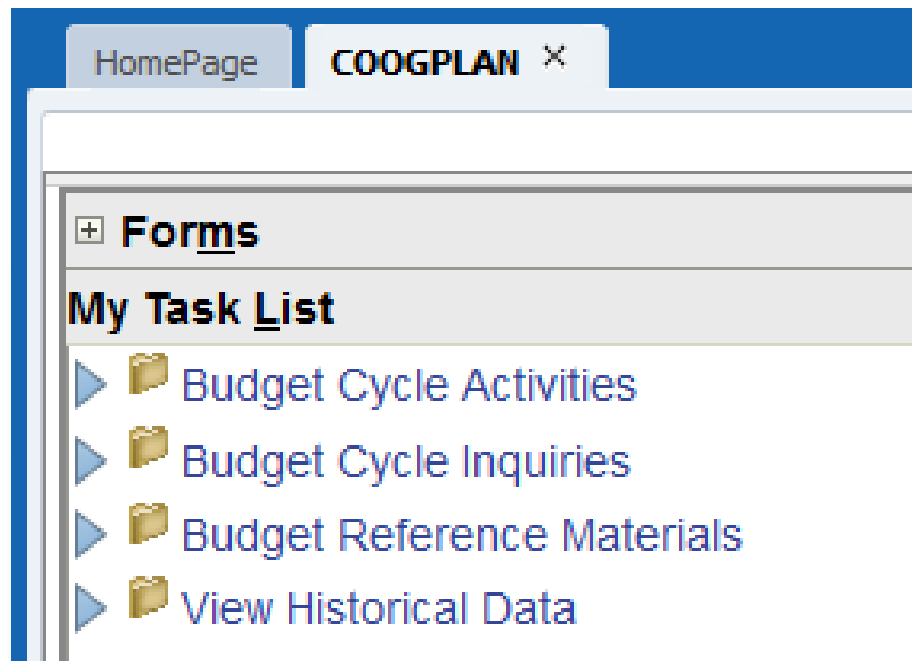
CoogPlan Homepage



- CoogPlan takes you to Task list (data entry forms)
- Explore takes you to reports

My Task List: You will see 4 Folders:

1. Budget Cycle Activities
2. Budget Cycle Inquiries
3. Budget Reference Materials
4. View Historical Data

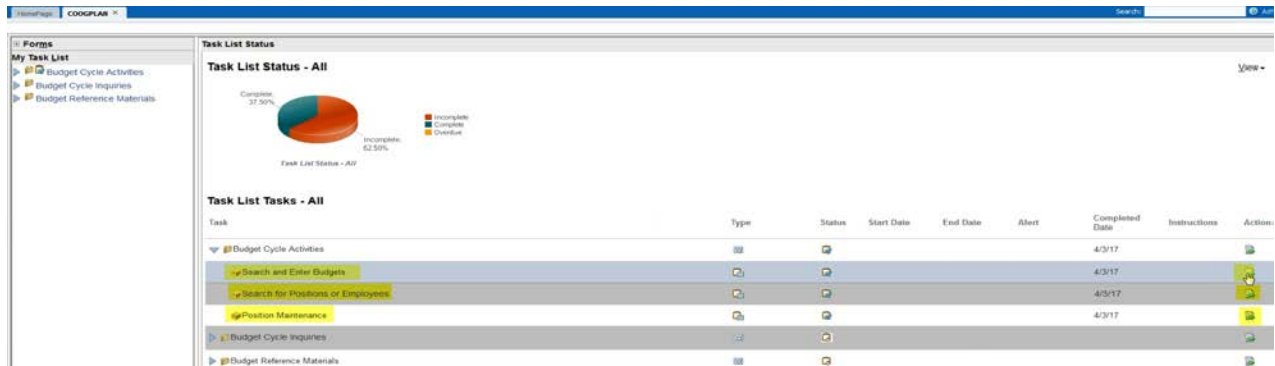


Budget Cycle Activities

1. **Budget Cycle Activities:** A task list where you will find your assignments. On this page you will also have the option to navigate to your entry forms.

Under **Budget Cycle Activities** you will see three search and entry forms:

- Search and Enter Budgets
- Search for Positions or Employees
- Position Maintenance



- A. **Search and Enter Budgets:** On this page you will see all current cost centers that you have access to. You can also choose to view one cost center at a time using a member selection (Chartfield) such as by *DEPARTMENT*, by *FUND* or by *PROGRAM*. Budget can also be updated from white cell column on PROPOSED fiscal year.

(NOTE: Report available to view cost center with the Modified date 09/01/YY (Current FY). Report displays all the cost centers that are active and have no dollar amount. Further discussed in Budget Reference Material.

HomePage

COOGPLAN - Task List Status

Forms

My Task List

Budget Cycle Activities

Search and Enter Budgets

Search for Positions or Employees

Position Maintenance

Budget Cycle Inquiries

Budget Reference Materials

View Historical Data

Budget Officer Reports

Task List Status

Task - Search and Enter Budgets

Task Instructions

Search by Department

Search by Fund

Search by Program

Scenario Budget

		FY18	FY19	FY19
		Base	Proposed	Change
1054 - E & G State Support-Fd 2-UH				
	B5038i - L3-S&W, EXEMPT STAFF	894,861	704,950	(189,911)
	B5039i - L3-S&W, NON EXEMPT STAFF	91,590	91,590	0
	Expenditures	986,451	796,540	(189,911)
	Balance	986,451	796,540	(189,911)
	B5038i - L3-S&W, EXEMPT STAFF	523,100	523,100	0
	B5039i - L3-S&W, NON EXEMPT STAFF	131,304	131,304	0
	Expenditures	654,404	654,404	0
	Balance	654,404	654,404	

- **Add a Cost Center:** By placing your cursor on a white cell and right clicking, you will be given the option to *ADD COSTCENTER*.
 - **How to add a new cost center** - (How to add a CC video) *to open the link press Ctrl and click on the blue font*

Forms

My Task List

- Budget Cycle Activities
 - Search and Enter Budgets**
 - Search for Positions or Employees
 - Position Maintenance
- Budget Cycle Inquiries
- Budget Reference Materials
- View Historical Data
- Budget Officer Reports

Task List Status

Task - Search and Enter Budgets Task Instructions

Search by Department Search by Fund Search by Program

Scenario Budget

	FY18 Base	FY19 Proposed	FY19 Change
1054 - E & C State Support-Fd 2-UH			
B5038 - L3-S&W, EXEMPT STAFF	894,861	704,950	(189,911)
B5039 - L3-S&W, NON EXEMPT STAFF	91,590	91,590	0
Expenditures	986,451	796,540	(189,911)
Balance	986,451	796,540	(189,911)
B5038 - L3-S&W, EXEMPT STAFF	523,100	523,100	0
B5039 - L3-S&W, NON EXEMPT STAFF	131,304	131,304	0
Expenditures	654,404	654,404	0
Balance	654,404	654,404	0
B4004 - OTHER FEES	(400)	(400)	0
Revenue	(400)	(400)	0
B5009 - L3-MAINTENANCE AND OPERATIONS	400	400	0
Expenditures	400	400	0

Add CostCenter

Add Group/CC CostCenter

Video Training for Search and Enter Budgets Form

Video Training for Adding a New CostCenter

Runtime Prompts - UHSAddCostCenter

Prompt Text	Value
* Entity Department	"FE_H0066"
* Fund	"FC_1054"
* Program Code	
* Budget Account	"B4001"

Launch Cancel

Steps:

1. Fill in Entity Department, Fund, Program and Budget Account. (**You can do so by keeping the same format** i.e. "FE_HXXXX", "FC_XXXX", "PR_BXXXX_730" and just change areas that have X's).
2. To fill in the Program Code click the search drop down menu to the right.

Runtime Prompts - UHSAddCostCenter

Member Selection

Dimensions Program

Members Variables

0474

Member Name

Program

- PR_E0474_730
- PR_H0474_730
- PR_G0474_730
- PR_D0474_730**
- PR_B0474_730

Add

Remove

Remove All

Member Name

Program

PR_D0474_730

3. Use the smart search tool to search for program
4. Highlight the program
5. Click Add
6. Scroll Down, Click OK

7. Once Department, Fund, Program and Budget Account are entered press LAUNCH.
 8. At this point you have added a cost center, remember to SAVE.
- **Add a Budget Node:** Go to the account code chartfield/member (budget node) and right click, you will see ADD BUDGET NODE option. You will also be able to add budget node from Cost Center Summary page.

	FY18	FY19	FY19
	Base	Proposed	Change
1054 - E & G State Support-Fd 2-UH	894,861	704,950	(189,911)
B5038i - L3-S&W, EXEMPT STAFF			
B5039i - L3-S&W			
Expenditures			0
Balance			(189,911)
B5038i - L3-S&W			0
B5039i - L3-S&W			0
Expenditures			0
Balance			0
B4004i - OTHER			0

- **View Cost Center Summary:** To view individual cost center information, place your cursor on *Program member* and right click you will see an option to *VIEW COST CENTER SUMMARY*.

	FY18	FY19	FY19
	Base	Proposed	Change
1054 - E & G State Support-Fd 2-UH	894,861	704,950	(189,911)
B5038i - L3-S&W, EXEMPT STAFF			
B5039i - L3-S&W			
Expenditures			0
Balance			(189,911)
B5038i - L3-S&W			0
B5039i - L3-S&W			0
Expenditures			0
Balance			0
B4004i - OTHER			0

Things you can do in View Cost Center Summary:

- Edit/Adjust Budget on Proposed Fiscal Year
- Edit FTE
- Double check that your cost center has enough Budget & FTE to cover allocated salaries.

Forms

My Task List

- Budget Cycle Activities
- Search and Enter Budgets
- Search for Positions or Employees
- Position Maintenance
- Budget Cycle Inquiries
- Budget Reference Materials
- View Historical Data
- Budget Officer Reports

Task List Status

Task - Search and Enter Budgets Task Instructions

Search and Enter Budgets Form > Cost Center Summary Form

Budget Pool Entry

Fund: 1054 - E & G State Support-Fd 2-UH Program: 80 - ENGINEERING S

	Actual FY18 Final	Budget FY18 Base	Budget FY19 Proposed	Budget FY19 Change
	Amounts	Amounts	Amounts	Amounts
Revenue Total				
B5006i - L3-SALARY AND WAGES	4			
B5038i - L3-S&W, EXEMPT STAFF	209,735	523,100	523,100	0
B5039i - L3-S&W, NON EXEMPT STAFF	22,339	131,304	131,304	0
Expenses Total	232,079	654,404	654,404	0
Accounts Total	232,079	654,404	654,404	0

Position and Job Summary

Scenario Budget

	FY19 Proposed	FY19 Proposed	FY19 Proposed
	Allocated Job Amount	Allocated Job FTE	Pool vs Job
B5038i	483,279.12	7.50	39,820.88
B5039i	131,303.20	3.00	0.80
Salary Accounts Total	614,582.32	10.50	39,821.68

Scenario Budget

	FY18 Base	FY19 Proposed	FY19 Proposed
	Percentage Allocation	Allocated Job Amount	Allocated Job FTE
B5038i	100.000	83,784.00	1.00
B5038i	100.000	61,200.00	1.00
B5038i	100.000	55,565.04	1.00
B5039i	100.000	50,192.35	1.00

*** **HOME DEPARTMENT** section allows user to see where position is housed (also helpful for split funded positions).

NOTE: If this is a salary cost center that is currently active and contains employees you will have the option to edit positions or employee information from the *Cost Center Summary Form*.

- To **Edit Employee Information** right click on the employee you wish to edit. Once again you will get a drop down menu where you will see *EDIT EMPLOYEE JOB INFORMATION*. **This will be further discussed in Search for Position or Employees section (B).**
- To **Edit Position Information** right click on POSITION member you wish to make changes to. You will get a drop down menu where you will see *EDIT POSITION INFORMATION*. **This will be further discussed in Position and Maintenance section (C).**
- [How to navigate the Search and Enter Budgets Form](#) - (How to Navigate search and enter Budget video link)

B. **Search for Position or Employees:** On this page you will see all employees under a particular area (college/division) with their present-day position. Using quick search you have the following options: *Search by Department*, *Search by Employee* and *Search by Position Number*.

HomePage | COOPLAN - Task List Status

Forms

My Task List

- Budget Cycle Activities
- Search and Enter Budgets
- Search for Positions or Employees
- Position Maintenance
- Budget Cycle Inquiries
- Budget Reference Materials
- View Historical Data
- Budget Officer Reports

Task List Status

Task - Search for Positions or Employees Task Instructions

Search by Department Search by Employee Search by Position Number

Scenario Budget Program: Unspecified Program

	FY19 Proposed	FY19 Proposed	FY19 Proposed	FY19 Proposed
	Position Type	Salary Basis	Default Weekly Hours	Annual Salary Spread
	Single Incumbent Monthly		40.00	12Months
	Single Incumbent Monthly		40.00	9Pay9
	Single Incumbent Monthly		40.00	12Months
	Single Incumbent Monthly		40.00	12Months
	Single Incumbent Monthly		40.00	9Pay12

- Edit Employee Job Information:** To edit employee job information from the main page (Search for Positions or Employees) right click on Employee's Name. Here you will see an option titled *Edit Employee job information*

HomePage | COOGLAN - Task List Status

Forms
My Task List
 Budget Cycle Activities
 Search and Enter Budgets
 Search for Positions or Employees
 Position Maintenance
 Budget Cycle Inquiries
 Budget Reference Materials
 View Historical Data
 Budget Officer Reports

Task List Status
 Task - Search for Positions or Employees Task Instructions

 Search by Department Search by Employee Search by Position Number
 Scenario: Budget Program: Unspecified Program

FY19 Proposed					
Position Type	Salary Basis	Default Weekly Hours	Annual Salary Spread	Comp Rate	Annualized Rate
Single Incumbent	Monthly	40.00	12Months	6,333.34	76,000.08
Single Incumbent	Monthly	40.00	9Pay9	5,581.44	50,232.96
Single Incumbent	Monthly	40.00	12Months	8,333.34	100,000.08
Single Incumbent	Monthly	40.00	12Months	10,475.00	125,700.00
Single Incumbent	Monthly	40.00	9Pay12	6,375.00	76,500.00

Steps:

- Right click on Employee Name, then click Edit Job Information (Hours, Salary Basis and Annual Salary Spread).

HomePage | COOGLAN - Task List Status

Forms
My Task List
 Budget Cycle Activities
 Search and Enter Budgets
 Search for Positions or Employees
 Position Maintenance
 Budget Cycle Inquiries
 Budget Reference Materials
 View Historical Data
 Budget Officer Reports

Task List Status
 Task - Search for Positions or Employees Task Instructions

 Position Search Form > Edit Job Information
 Scenario: Budget Position: Employee: Akay, Yasemin - 0986677_ID

 Job Information

	Department Chartfield	Prior to Changes			Prior to Changes				All Priority Changes		All Priorities	
		Default Weekly Hours	Salary Basis	Annual Salary Spread	Position Type	Job FTE	Comp Rate	Annualized Rate	Comp Rate	Annualized Rate	Comp Rate	Annualized Rate
FY18 Current		40.00	Monthly	9Pay9	Single Incumbent	1.00	5,681.44	51,132.96			5,681.44	51,132.96
FY18 Base		40.00	Monthly	9Pay9	Single Incumbent	1.00	5,581.44	50,232.96			5,581.44	50,232.96
FY19 Proposed		40.00	Monthly	9Pay9	Single Incumbent	1.00	5,581.44	50,232.96			5,581.44	50,232.96
FY19 Change		0.00				0.00	0.00	0.00			0.00	0.00

- Add/Remove Priority:** You can add a priority by right clicking on department chartfield/member and selecting ADD PRIORITY from drop down menu.

Steps:

- Right click on Department member and select ADD PRIORITY from drop down list.

HomePage | COOGLAN - Task List Status

Forms
My Task List
 Budget Cycle Activities
 Search and Enter Budgets
 Search for Positions or Employees
 Position Maintenance
 Budget Cycle Inquiries
 Budget Reference Materials
 View Historical Data
 Budget Officer Reports

Task List Status
 Task - Search for Positions or Employees Task Instructions

 Position Search Form > Edit Job Information
 Scenario: Budget Position: Employee: Akay, Yasemin - 0986677_ID

 Job Information

	Department Chartfield	Prior to Changes			Prior to Changes				All Priority Changes		All Priorities	
		Default Weekly Hours	Salary Basis	Annual Salary Spread	Position Type	Job FTE	Comp Rate	Annualized Rate	Comp Rate	Annualized Rate	Comp Rate	Annualized Rate
FY18 Current		40.00	Monthly	9Pay9	Single Incumbent	1.00	5,681.44	51,132.96			5,681.44	51,132.96
FY18 Base		40.00	Monthly	9Pay9	Single Incumbent	1.00	5,581.44	50,232.96			5,581.44	50,232.96
FY19 Proposed		40.00	Monthly	9Pay9	Single Incumbent	1.00	5,581.44	50,232.96			5,581.44	50,232.96
FY19 Change	H04	0.00				0.00	0.00	0.00			0.00	0.00

- Left click on Member Selector Icon to search for list of priorities

Runtime Prompts - Add a Priority to Employee

Prompt Text	Value
Priority Code	P_SME

Member Selector Icon

Launch Cancel

3. Click on search drop down menu

Runtime Prompts - Add a Priority to Employee

Members Variables

Member Name

Priorities

- P_FCO
- P_FEQ
- P_FME
- P_FPR
- P_SME

Add Remove Remove All

Member Name

Priorities

- P_FME

Help OK Cancel

4. Highlight priority type

5. Press Add

6. Press Okay

7. Then LAUNCH

Task List Status

Task - Search for Positions or Employees Task Instructions

Position Search Form > Edit Job Information

Scenario: Budget Position: Employee: Akay, Yasem

Job Information

	Prior to Changes			Prior to Changes				All Priority Changes		All Priorities	
	Default Weekly Hours	Salary Basis	Annual Salary Spread	Position Type	Job FTE	Comp Rate	Annualized Rate	Comp Rate	Annualized Rate	Comp Rate	Annualized Rate
FY18 Current	40.00	Monthly	9Pay9	Single Incumben	1.00	5,681.44	51,132.96			5,681.44	51,132.96
FY18 Base	40.00	Monthly	9Pay9	Single Incumben	1.00	5,581.44	50,232.96			5,581.44	50,232.96
FY19 Proposed	40.00	Monthly	9Pay9	Single Incumben	1.00	5,581.44	50,232.96			5,581.44	50,232.96
FY19 Change	0.00				0.00	0.00	0.00			0.00	0.00

Edit Priorities

Years: FY19 Version: Proposed

	Comp Rate	Annual Priority Amount
P_SME - Staff Merit		1,000

8. Add a dollar amount to the priority

9. SAVE

- You can also **REMOVE** a priority

Steps:

1. Right click on Priority
2. Click on Remove Priority
3. Remember to SAVE

NOTE:

Edit Position Information: You can also edit Position Information from main page (Search for Positions or Employees) by right clicking on the desired position where you will see an option titled *Edit Position Information*. **This is further discussed in Position Maintenance section (C).**

C. Position Maintenance: On this page you will see all active positions with current employees. You have the option to do a Smart Search by Department ID, Employee or Position Number.

	FY18 Current			FY18 Base			FY19 Proposed		
	Default Weekly Hours	Annual Salary Spread	Comp Rate	Default Weekly Hours	Annual Salary Spread	Comp Rate	Default Weekly Hours	Annual Salary Spread	Comp Rate
00010733_POS	40.00	12Months	29,227.25	40.00	12Months	28,654.17	40.00	12Months	28,654.17
00010734_POS	0.00	12Months	0.00	0.00	12Months	0.00	0.00	12Months	0.00
00010735_POS	0.00	12Months	0.00	0.00	12Months	0.00	0.00	12Months	0.00
00010736_POS	0.00	12Months	0.00	0.00	12Months	0.00	0.00	12Months	0.00
00010737_POS	40.00	12Months	10,894.00	40.00	12Months	10,475.00	40.00	12Months	10,475.00

Edit Position Information: To edit position information from the main page (Search for Positions or Employees) right click on position where you will see an option titled *Edit Position Information*.

Steps:

1. Right click on position number
2. Click Edit Position Information

This will take you to a form where you can see the funding source of a position along with the percentage allocation and FTE information.

- Here you can edit, add or remove a Funding Source
- Change Percentage Allocation

The screenshot shows the 'Task List Status' form with the 'Position Maintenance' tab selected. The 'Edit Position Funding' sub-tab is active, showing a table with columns for 'Current', 'Base', and 'Proposed' funding. A context menu is open over the 'Percentage Allocation' column, with options: 'Add Funding Source', 'Change Funding Source', 'Remove Funding Source', 'Add Group CC Funding Source', 'Change Funding Source to Group CC', and 'View Cost Center Summary'. The 'Add Funding Source' option is highlighted.

				Percentage Allocation	Allocated Job Amount	Allocated Job FTE
Current	2064 - Desig-Tuition		B5038i - L3-S&W, EXEMPT STAFF	100.000	53,040.12	1.00
			Total Current HR Funding	100.000	53,040.12	1.00
Base	2064 - Desig-Tuition		B5038i - L3-S&W, EXEMPT STAFF	100.000	52,000.08	1.00
			Total Base Funding	100.000	52,000.08	1.00
Proposed	2064 - Desig-Tuition		B5038i - L3-S&W, EXEMPT STAFF	40.000	20,800.03	0.40
	2091 - Desig-Indirect Cost		B5038i - L3-S&W, EXEMPT STAFF			
	Group CC Fund Group 5		B5038i - L3-S&W, EXEMPT STAFF			
			Total Proposed Funding			

3. Right click on Percentage Allocation
4. Click on Add Funding Source from Percentage Allocation cell (base/proposed)

The 'Runtime Prompts - Add Funding Source' dialog box is shown. It has fields for 'Entity Department' (PFE), 'Fund' (FC_2064), and 'Program Code' (PR_730). The 'Fund' field is highlighted with a red circle. At the bottom right, the 'Launch' button is also highlighted with a red circle.

5. Add or Edit funding source
6. Click LAUNCH

The screenshot shows the 'Task List Status' form with the 'Position Maintenance' tab selected. The 'Edit Position Funding' sub-tab is active, showing the updated table with funding sources. The 'Add Funding Source' option from the context menu has been used to add a new funding source.

				Percentage Allocation	Allocated Job Amount	Allocated Job FTE
Current	2064		B5038i - L3-S&W, EXEMPT STAFF	100.000	53,040.12	1.00
			Total Current HR Funding	100.000	53,040.12	1.00
Base	2064		B5038i - L3-S&W, EXEMPT STAFF	100.000	52,000.08	1.00
			Total Base Funding	100.000	52,000.08	1.00
Proposed	2064		B5038i - L3-S&W, EXEMPT STAFF	40.000	20,800.03	0.40
	2091		B5038i - L3-S&W, EXEMPT STAFF	20.000	10,400.02	0.20
	Group CC Fund Group 5	Input H0406_L3 ENGINEERING PH	GRPCC_ENGR - Engineering - Fund 5	40.000	20,800.03	0.40
			Total Proposed Funding	100.000	52,000.08	1.00

7. Change the Percentage Allocation (remember overall percent allocation must equal 100%).

8. Press SAVE

	Current	Base	Proposed	Funding Source	Percentage Allocation	Allocated Job Amount	Allocated Job FTE
	2064 - Desig-Tuition			B5038i - L3-S&W, EXEMPT STAFF	100.000	53,040.12	1.00
				Total Current HR Funding	100.000	53,040.12	1.00
				B5038i - L3-S&W, EXEMPT STAFF	100.000	52,000.08	1.00
				Total Base Funding	100.000	52,000.08	1.00
	2064 - Desig-Tuition			B5038i - L3-S&W, EXEMPT STAFF	40.000	20,800.03	0.40
	2091 - Desig-Indirect Cost			B5038i - L3-S&W, EXEMPT STAFF			
	Group CC Fund Group 5			B5038i - L3-S&W, EXEMPT STAFF			
				Total Proposed Funding			

In this section you can also:

- Change Funding Source
- Remove Funding Source
- Add Group CC Funding Source
- Change Funding Source to Group CC

Change Funding Source:

- Select Change Funding Source
- You will select appropriate Chartfield values (see screenshot below)
- Click on LAUNCH

Prompt Text	Value
* Change Funding Dept to	"PFE_ []"
* Change Fund to	"FC_2063"
* Change Funding Program to	"PR_ [] 730"
* Old Funding Dept	"PFE_ []"
* Old Fund	"FC_2063"
* Old Funding Program	"PR_ [] 730"
* Version	"Proposed"

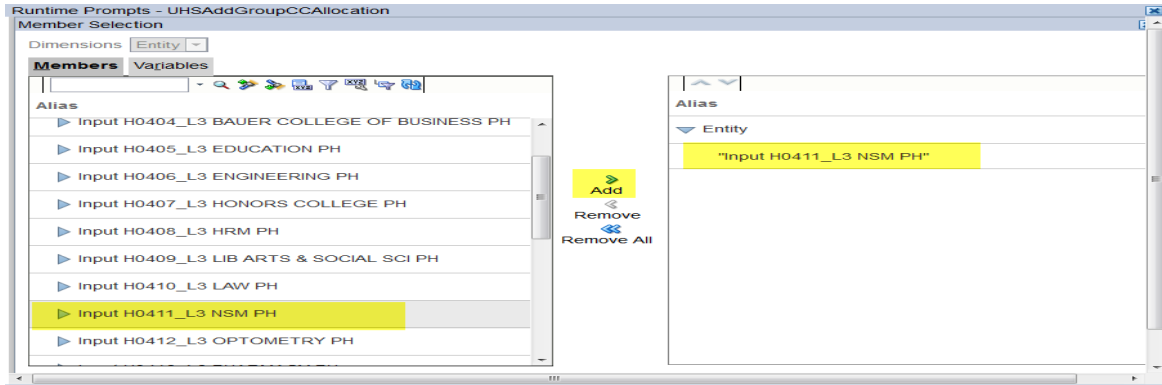
Launch Cancel

Remove a Funding Source:

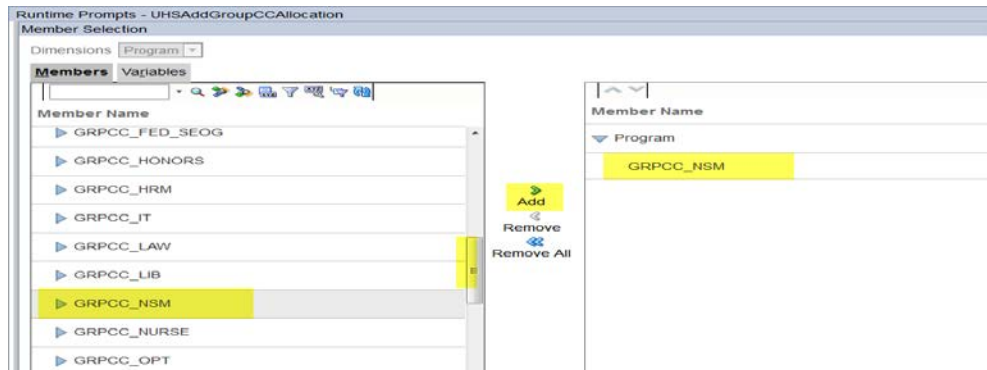
- Select Remove Funding Source or Delete the value from the funding source that you want to delete
- SAVE

Add Group CC Funding Source:

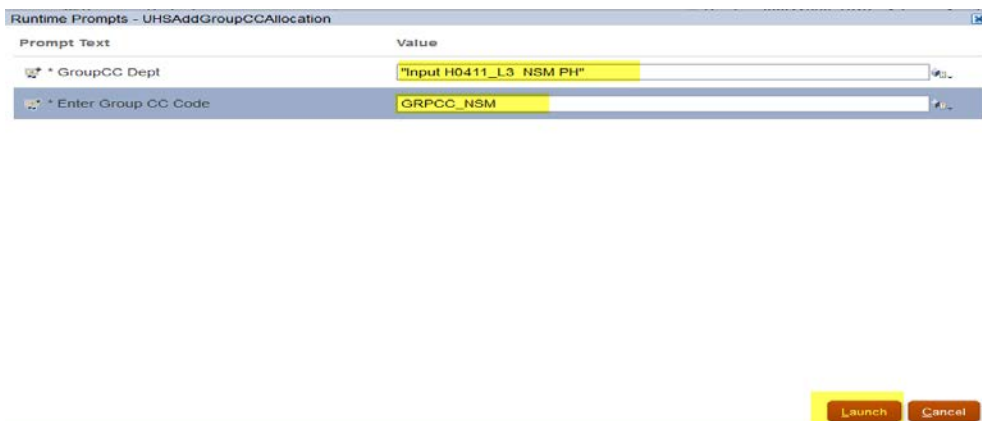
- Select Add Group CC Funding Source
- Search for Group CC Dept. by clicking member selector Icon and select Department
- Once department is selected click on ADD (See screen shot below)
- Click Ok



- Search for Enter Group CC code by clicking member selector Icon and select appropriate Program
- Once Program is selected click on ADD (See screen shot below)
- Click Ok



- Then LAUNCH



- Once Group CC is added adjust your percentage accordingly

Change Funding Source to Group CC:

- Select Change Funding Source to Group CC

Prompt Text	Value
* Change Funding Dept to GroupCC Dept	"PFE_H0066"
* Change to Group CC Code	"PR_D0370_730"
* Old Funding Dept	"PFE_H0066"
* Old Fund	"FC_2064"
* Old Funding Program	"PR_D0370_730"

- Search for funding department to Group CC

Runtime Prompts - UHSChangeGroupCCAllocation

Member Selection

Dimensions: Entity

Members

Alias

Entity

Input H0403_L3 GERALD D HINES ARCH & DESIG PH

Input H0404_L3 BAUER COLLEGE OF BUSINESS PH

Input H0405_L3 EDUCATION PH

Input H0406_L3 ENGINEERING PH

Input H0407_L3 HONORS COLLEGE PH

Input H0408_L3 HRM PH

Input H0409_L3 LIB ARTS & SOCIAL SCI PH

Input H0410_L3 LAW PH

Add

Remove

Remove All

- Click ok

Runtime Prompts - UHSChangeGroupCCAllocation

Member Selection

Dimensions: Program

Members

Member Name

Program

GRPCC_CBA

GRPCC_CLASS

GRPCC_COTA

GRPCC_EDUC

GRPCC_ENGR

GRPCC_FED_CWS

GRPCC_FED_PELL

GRPCC_FED_SEOG

GRPCC_HONORS

Add

Remove

Remove All

- Search for a corresponding Group CC code
- Click ok
- Then LAUNCH
- Remember to enter a Percentage Allocation amount equal to 100%.
- SAVE

Task List Status

Task - Position Maintenance

Position Maintenance Forms > Edit

Edit Position Funding

Current	1054 - E & G State Sup
Base	1054 - E & G State Sup
Proposed	1054 - E & G State Sup

View Job Information for Position

FY18	Current	H0068
FY18	Base	H0068
FY19	Proposed	H0068

Sync Employee Current HR to Proposed

Vacate Position in Proposed

Edit

Adjust

Comments

Supporting Detail

Change History

Attachments

Lock/Unlock Cells

Filter

Sort

Analyze

New Ad Hoc Grid

Select All

Position:00010785_POS - Professor

		Percentage Allocation	Allocated Job Amount	Allocated Job FTE
730 - CIV ENGR FACULTY SALARIES	B5034i - L3-S&W, TENURE TRACK FACULTY	100.000		1.00
Total Current HR Funding		100.000		1.00
730 - CIV ENGR FACULTY SALARIES	B5034i - L3-S&W, TENURE TRACK FACULTY	100.000		1.00
Total Base Funding		100.000		1.00
730 - CIV ENGR FACULTY SALARIES	B5034i - L3-S&W, TENURE TRACK FACULTY	100.000		1.00
Total Proposed Funding		100.000		1.00

Prior to Changes				All Priority Changes		All Priorities	
Job FTE	Comp Rate	Annualized Rate	Comp Rate	Annualized Rate	Priority Percent Change	Comp Rate	Annualized Rate
1.00					0.000%		
1.00					0.000%		
40.00	Single Incumb	1.00			0.000%		

***"Sync" option will default the employee to reflect current data in HR.

On Position Funding section of Position Maintenance form, you can:

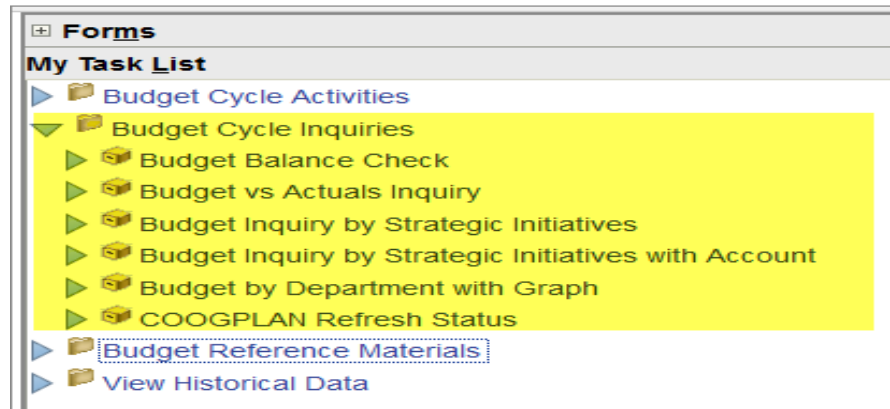
- Vacate a position
- Sync Employee Current HR information (only if information is already under HR PeopleSoft)

Other Video link

- [Change History](#) - (How to View change history video link) - To open the link press *Ctrl* and click on the blue font

Budget Cycle Inquiries

2. **Budget Cycle Inquiries:** These six forms are designed to give an overview of your budget and help you to determine if you are in balance.



A. Budget Balance Check:

- a. Budget Balance Check form provides a department summary by fund group with the ability to drill down (by right clicking on fund group and selecting Open Fund Group) all the way down to the program level of a cost center.
- b. You can expand on expenditure and revenue budget nodes to get a break down of your budget.
- c. To watch our training video click [here](#). *To open the link press Ctrl and click on the blue font*

Examples of how you can use form:

1. This form helps you verify that your budget balances:
 - a. By Fund Group
 - b. By Fund Code
 - c. By Cost Center
 - d. By Department
2. Use the balance column to verify central allocations as well as self-supported funds.
3. Use the interactive tool to find the trouble spots.

B. Budget vs Actuals Inquiry:

- On this form you can see your budget for Current and Proposed year vs Actuals (year to date), and commitments by budget node.
- It enables the end user to view information by department grouping, fund grouping and program grouping.
- This form will be available year round (as view only) to help you maintain your budget and have a better assessment for proposed year's financial plan.
- To watch our training video click [here](#).

	NACUBO	A	D	E	H	I
1	Student Access and Success	Instruction	Academic Support	Student Services	Scholarships & Fellowships	Auxiliary Enterprises
	NACUBO	B				
2	National Competitiveness	Research				
	NACUBO	F	G			
3	Infrastructure & Administration	Institutional Support	Physical Plant			
	NACUBO	C				
4	Community Advancement	Public Service				

C. Budget by Department with Graph:

- This graph represents the sources and use of the selected department for current and proposed fiscal year.
- The sources are presented by fund group (doesn't include Fund balance and Recovered cost).
- The expenses are presented by the strategic initiative of the university and could be classified by the NACUBO function.
- Strategic Initiative Category consist of the following NACUBO (program) groupings:
- To watch our training video click [Here](#). *To open the link press Ctrl and click on the blue font*

D. Budget Inquiry by Strategic Initiatives

- Allows you to review budget by Strategic Initiatives by selecting Fund and Department. This option provides two years of actuals and current year along with commitments. When you expand Strategic Initiatives you will see only the NACUBO's that have Revenue and/or Expenditures.

E. Budget Inquiry by Strategic Initiatives with Account

- Allows you to review budget by Strategic Initiatives by selecting Fund, Department and Account. Account option lets you select various combinations, example: faculty, salary and also a budget node. This option provides two years of actuals and current year along with commitments. When you expand Strategic Initiatives you will see only the NACUBO's that have Revenue and/or Expenditures in the Account selected on top drop down option.

NOTE:

- Accounts reflect Budget Summary Tree, therefore it is in following order.
- **REVENUE**, includes Fund Balance plus Recovered Cost
- **Other Revenue**, represents Revenue minus Fund Balance and Recovered Cost
- **EXPENDITURES**, includes all Expenditures

F. COOPLAN Refresh Status

- This query will show you when the Coogplan forms and reports were last updated.

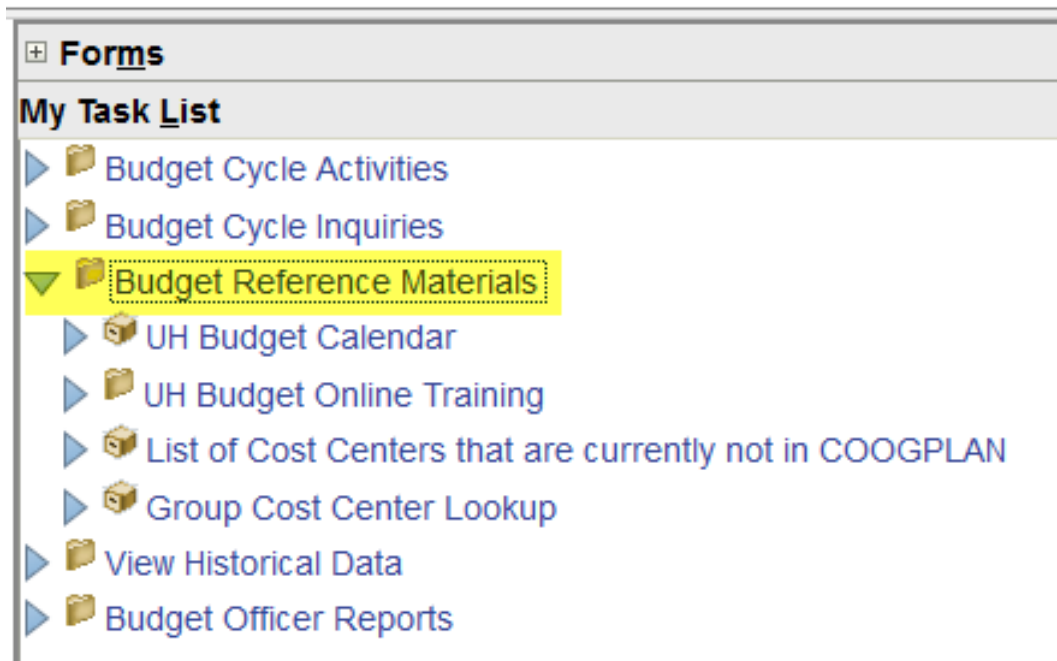
Budget Reference Materials

UH Budget Calendar: You can view UHS Budget Office Planning Calendar – Key Dates

UH Budget Online Training: On this section you will find all training videos for Hyperion. (Video links are on page 23)

Group Cost Center Lookup: On this section you can view all Group 5 combinations that are permissible for your area (you can refer to this list when you need to select a funding source for the position).

List of cost centers that are currently not in Coogplan: This report allows you to view all the cost centers that don't have any base budget and were **modified on or after 09/01/YYYY**.



View Historical Data

View Historical Actuals: you will see historical data at a cost center level by budget node for two full years plus year to date actuals of current fiscal year.

View Historical Budget: you will see historical data at a cost center level by budget node for three years of base and proposed.

View Budget Changes from Year to Year: on this form only the change column to the View Historical Budget form is displayed allowing you to see the difference between the base and proposed budget.

View Historical Budget Balance by Entity: This form allows you to see Base and Proposed totals for all cost centers by department one year at a time, subtotaled by fund code.

View Historical Financials for One Year: On this form you have a drop down menu where you can select Fiscal Year, Fund Code, Department and a Program. The form is displayed by budget node.

Historical Position Search by Department: This form allows you to view historical data for positions by Fiscal Year and Department.

Historical Position Search for All Years: On this form you can search for a position and get historical data.

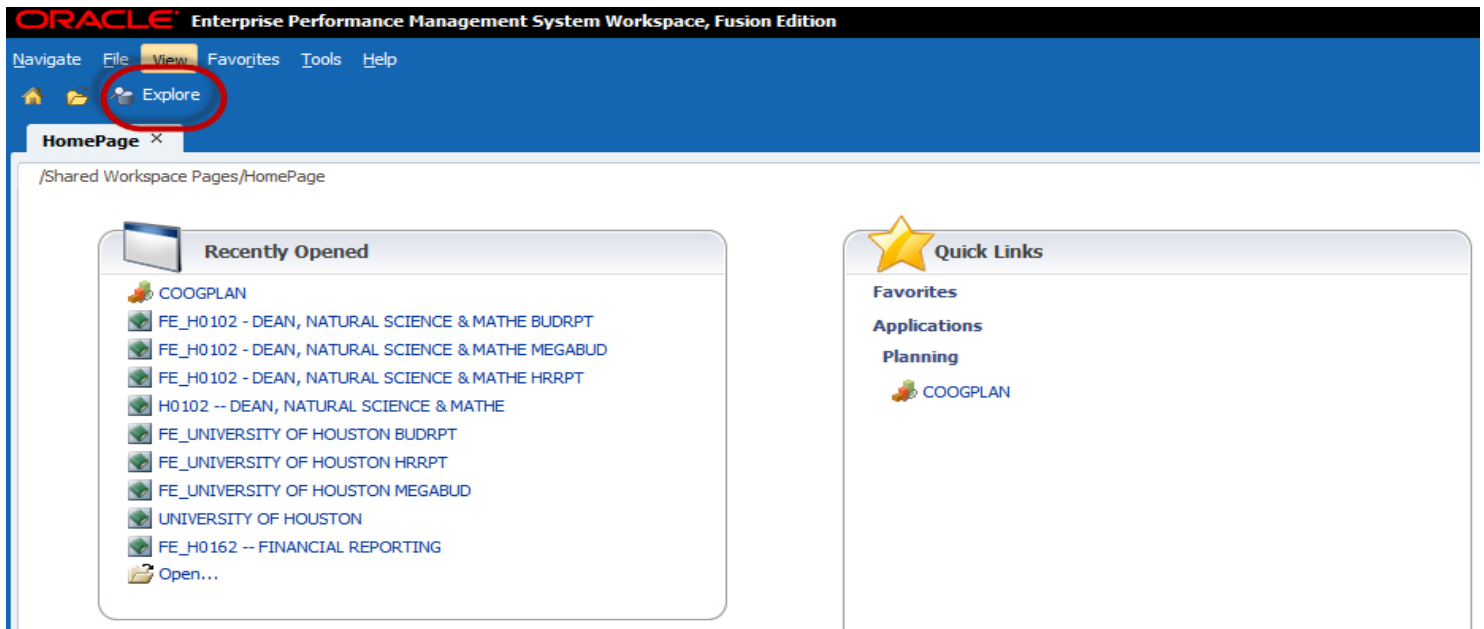
Historical Employee Search for All Years: On this form you can search for an employee and get historical data.

The screenshot shows a software interface with a 'Forms' menu. Under the 'Forms' menu, there is a 'My Task List' section. The 'My Task List' section contains a list of tasks, each preceded by a blue triangle icon. The task 'View Historical Data' is highlighted in yellow. Below 'View Historical Data', there are several sub-tasks, each preceded by a blue triangle icon and a small document icon: 'View Historical Actuals', 'View Historical Budget', 'View Budget Changes from Year to Year', 'View Historical Budget Balance by Entity', 'View Historical Financials for One Year', 'Historical Position Search by Department', 'Historical Position Search for All Years', and 'Historical Employee Search for All Years'.

- Forms**
- My Task List**
- ▶ Budget Cycle Activities
- ▶ Budget Cycle Inquiries
- ▶ Budget Reference Materials
- ▶ **View Historical Data**
- ▶ View Historical Actuals
- ▶ View Historical Budget
- ▶ View Budget Changes from Year to Year
- ▶ View Historical Budget Balance by Entity
- ▶ View Historical Financials for One Year
- ▶ Historical Position Search by Department
- ▶ Historical Position Search for All Years
- ▶ Historical Employee Search for All Years

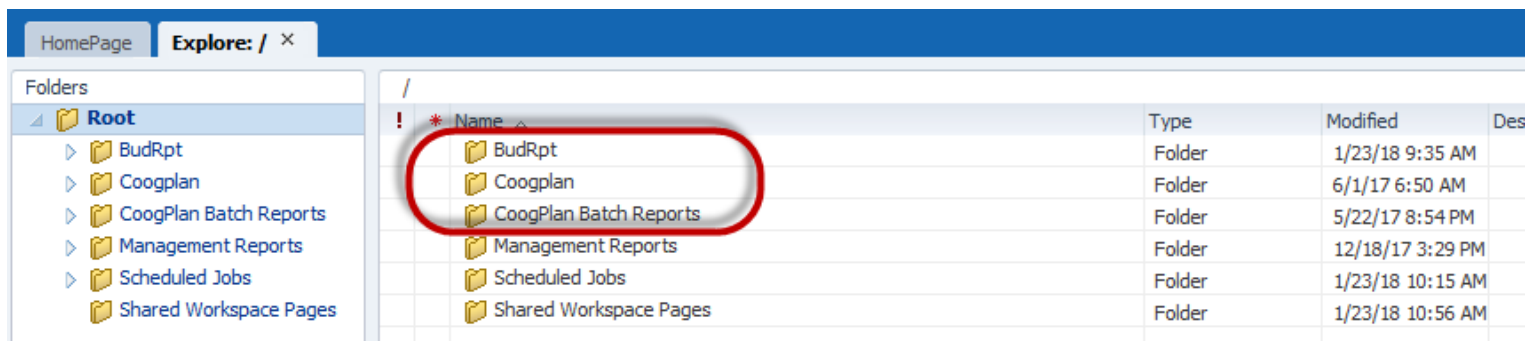
REPORT SECTION

How to access reports: From *Homepage*



Click on Explore to access all reports

There are three different folders in the reporting section –



❖ **COOPLAN** – Currently updates every 10 minutes. – (*Running Reports on Demand*)

- Budget Report by Employee
- Budget Request Form
- Budget summary
 - Budget Summary Rpt. by Budget Node
 - Budget Summary Rpt. by Fund and NACUBO
 - Budget Summary Rpt. by Fund Department and NACUBO
 - Budget Summary Rpt. by Fund Group

➤ **MegaBud**

- MegaBud Comp - Selectable by CC-FC-Dept-Prog
- MegaBud Uncomp by CostCenter

➤ **Pool vs Job**

- Pool vs Job Report - All Budget Nodes
- Pool vs Job Report - Salary Nodes

➤ **Position Budget Report**

- Position Budget Non Funded Positions Report

➤ **Priority Report**

- Priority Report by Employee - All Rows
- Priority Report by Employee with Cost Center
- Priority Roster By Cost Center
- Priority Roster By Fund Group
- Priority Roster By Priority Pool
- Priority Roster By Single Priority Code

➤ **Roster Report**

- Faculty and Staff Salary Expenses by Budget Node
- Faculty and Staff Salary Expenses by Fund Code
- Faculty Roster Report

❖ **BUDRPT** – Updates overnight which means that is the equivalent to Report Book –

➤ **Audit Report**

- 730 Uses Audit Report - Table A Cost Center
- 730 Uses Operating Budget by Fund Report - Table A
- 730 Uses Operating Budget Report - Table A
- 783 Uses Audit Report - Table A Cost Center
- 783 Uses Operating Budget by Fund Report - Table A
- 783 Uses Operating Budget Report - Table A
- Sources Audit Report by Cost Center
- Sources Audit Report by Cost Center by Fund Selection
- Sources Operating Budget by Fund Report

- Sources Operating Budget Report
- Uses Audit Report by Cost Center – Selectable
- Uses Audit Report by Cost Center - Selectable Fund
- Uses Operating Budget by Fund Report – Selectable
- Uses Operating Budget Report – Selectable

➤ **Budget summary**

- Budget summary by cost center pivot report (Pivot Friendly)
- Budget Summary Report by Cost Center (Pivot Friendly)
- Budget Summary Report by Cost Center with Dept. and Fund Group
- Budget Summary Report by Dept.ID and Fund Group
- Budget Summary Report by Dept.ID Program Group
- Budget Summary Report by Fund Code and NACUBO
- Budget Summary Report by Fund Group
- Budget Summary Report by Fund Group and NACUBO
- Budget Summary Report by Strategic Init Fund Group and Department

➤ **MegaBud**

- MegaBud Comp - Selectable by Fund and Dept
- MegaBud Uncomp by CostCenter

➤ **Pool vs Job**

- Pool vs Job Report - All Budget Nodes
- Pool vs Job Report - All Budget Nodes Diff Only
- Pool vs Job Report - Salary Nodes

➤ **Table E**

- Table E Report - Individual

❖ **CoogPlan Batch Reports** - Report Books will be updated on a nightly basis so every morning you will have an updated version of your Report Books. To watch our training video on the Report Book click [Here](#). *To open the link press Ctrl and click on the blue font*

List of Reports available in daily batch reports

Set 1 – Blank

- Faculty/Staff Roster Report
- Position Funding Pivot Report

Set 2 – MEGABUD -

- MegBud – by Cost center – will include all the cost centers with budget for the department.

Set 3 – HRRPT

- Position Funding my Employee – all fund groups and all program

Set 4 – BUDRPT

- Budget summary report by fund code
- Budget summary report by fund code and cost center
- Budget summary report by fund code with group total
- Budget summary report by fund group
- Uses Audit Report by Cost Center - Selectable
- Pool vs Job report – All budget nodes
- Pool vs job – Salary Nodes
- Table E report – Individual
- Uses Operating budget by fund report – Selectable
- MegaBud comp – Selectable by Fund and Dept.

Note: The previous reports will be overwritten so if you wish to archive reports, save them to another location on your computer.

6. Other Video Links – *To open the link press Ctrl and click on the blue font*

- [How to turn on User Point of View](#)
- [How to run Reports](#)
- [How to pick-up your daily report batch](#)
- [How to navigate the Search and Enter Budgets Form](#)
- [How to add a new cost center](#)
- [Logging into CoogPlan](#)
- [Budget Balance Check](#)
- [Budget by Department with Graph](#)
- [Budget vs Actuals Inquiry](#)
- [Report Book](#)
- [Workspace-Task list status v2](#)
- [Change History](#)