

Delphi Quick Training

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Delphi Update

The Delphi system recently had its servers and Hyperion software upgraded. The Monthly Forecast process was re-implemented and is now ready for you to use. We would like to thank those who have taken time to be part of the testing to help us get this done.

NEW LINKS DUE TO UPGRADE

Below are a few changes you need to be aware of due to the upgrade:

1. Please use this web link going forward (and delete your old link):

<https://hyp02.uchicago.edu:4443/workspace/index.jsp>

2. For Smart View users , please add this link for the new production Smart View server. <https://hyp02:4443/workspace/SmartViewProviders> Go to Smart View > Options > Advanced and copy/paste it into the Shared Connections URL box.

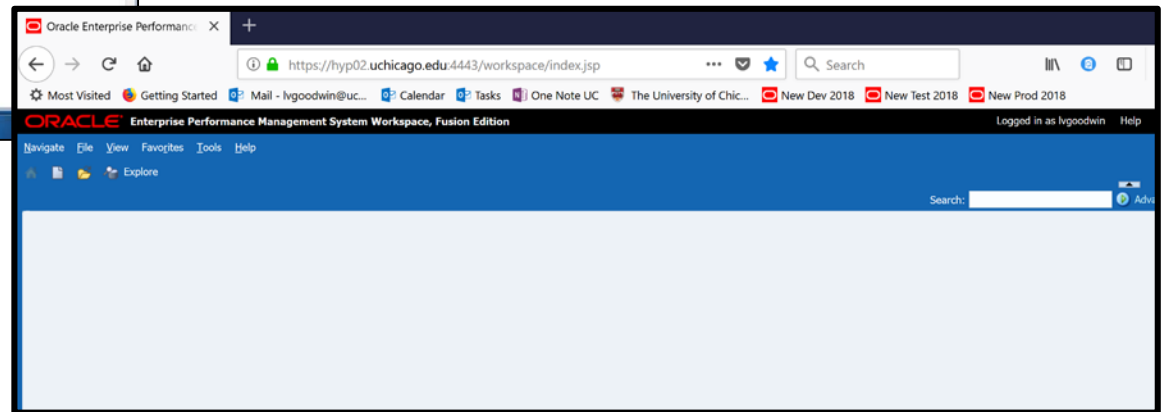
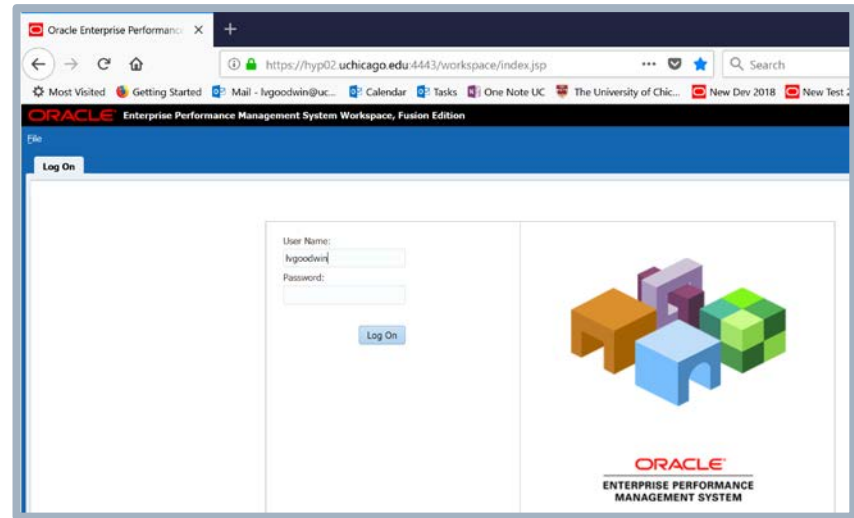
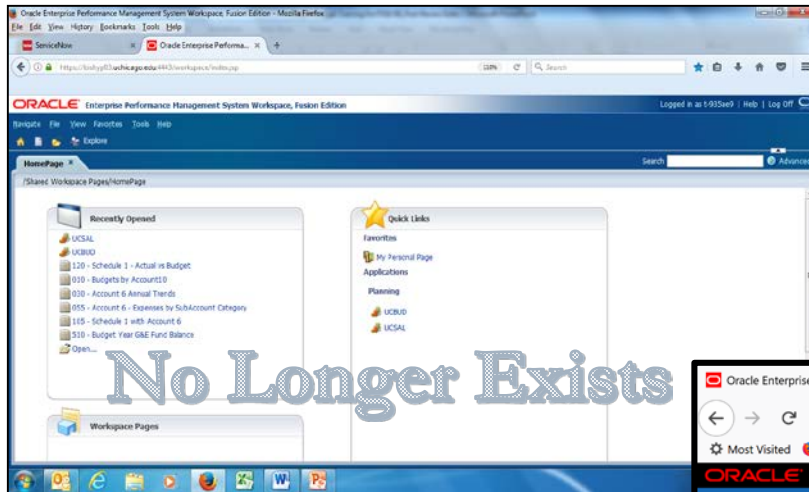
Training Dates (Drexel Room 146) Max 16

- Tuesday, July 17th 2-4
- Wednesday, July 25th 10 – 12
- Tuesday, July 31st 2 – 4
- Monday, Aug 6th 2- 4
- Wednesday, Aug 8th 10 – 12



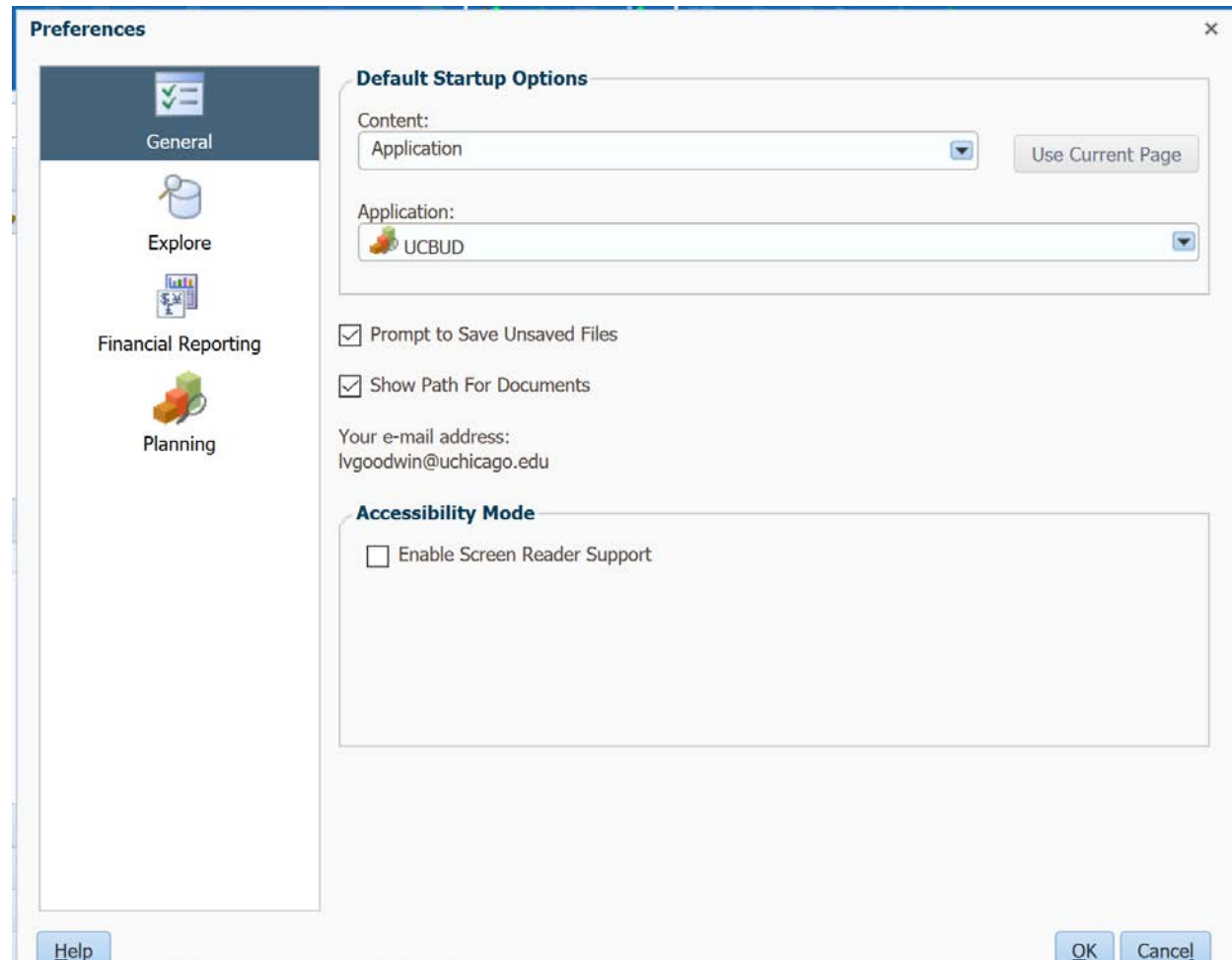
Login

- Using your Cnet ID and Password
- Authenticates to Delphi security access
- No Home Page with Quick Links
- New Optional Preference Setting
- Navigation to Applications



Setting General User Preference

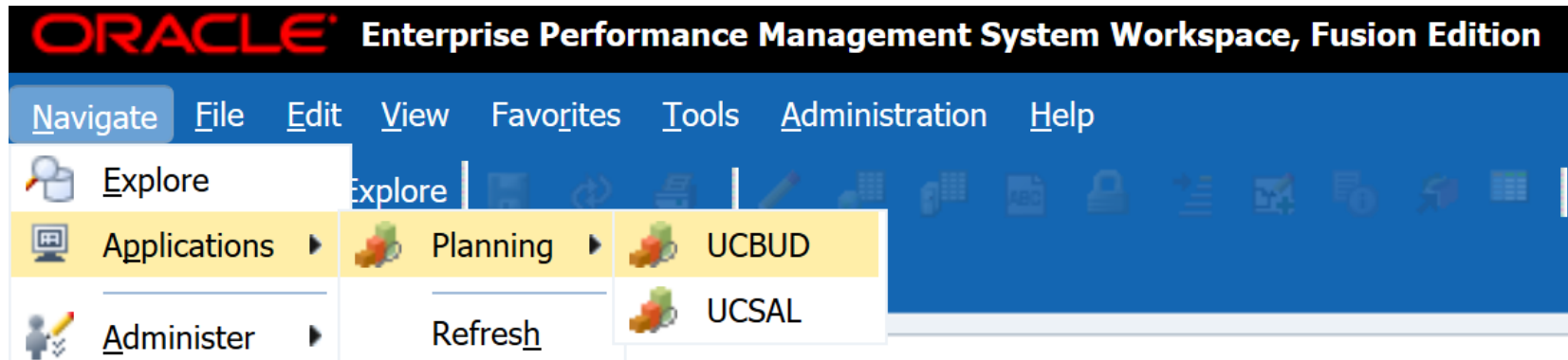
- You can also set one of the applications to open up automatically by going to File > Preferences
- Select General and Choose Application as the Content Type and then the desired application



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Navigate to Applications

- To navigate to the UCBUD or UCSAL application, select the Navigate menu and choose Applications > Planning > UCBUD or UCSAL



Set Preferences

Open the application and go to the Preferences section
Must set User Variables for Account6 and Version

The screenshot shows the 'UCSAL - User Preferences' window. On the left is a navigation menu with options: Forms, Manage Task Lists, My Task List, Dimension, Business Rule Security, and Preferences (selected). The main area is titled 'User Preferences' and has four tabs: Application Settings, Display Options, Printing Options, and User Variable Options (selected). Below the tabs is a table with three columns: Dimension, User Variable Name, and Selected Member.

Dimension	User Variable Name	Selected Member
Account 6	UV_Acct6	FAS_44
Version	UV_Draft	1st Draft

The screenshot shows two overlapping windows: 'UCSAL - User Preferences' and 'UCBUD - User Preferences'. Both windows have the same navigation menu and 'User Preferences' section with the 'User Variable Options' tab selected. The tables in both windows show the same data for 'Account 6' and 'Version' dimensions.

Dimension	User Variable Name	Selected Member
Account 6	UV_Unit	FAS_44
Version	UV_Draft	1st Draft
Account 6	UV_Dept	FAS_450

UCSAL

- Same forms, Same functions as used for Budget
- Scenario points to a Forecast month for example Jul Forecast

UCSAL - 1A. Compensation Forecast by Account 6

Search:

Forms

Form Folder

- Forms
 - Budget Office Forms
 - Unit Forms
 - Budget
 - Launch Business Rules
 - Report Views
 - Monthly Forecasts**

Forms in Monthly Forecasts

- Form
 - 1A. Compensation Forecast by Account 6
 - 1B. Compensation Forecast by Individual
 - 1C. Compensation Forecast by Position
 - 1D. Compensation Forecast by Sub Account
 - 1E. Compensation Forecast by Exec or Dept

1A. Compensation Forecast by Account 6

Years:2019 UV_Acct6: 44 - Information Technology Services

244804 - Its Web Services Recharg

Forecast Employees by Account 6 **Modify Monthly Forecast by Account 6**

Scenario:Jul Forecast

	Job Pay Rate Amt	Allocation Pct Rate	Allocation Pay Amt	% Change
GOODWIN,LEVITA - 60850019D P9097151 IM202A - It Project Manager Senior 120				

- Does not use Actuals
- No Locked Periods

1A. Compensation Forecast by Account 6

Years:2019 UV_Acct6: 44 - Information Technology Services

244804 - Its Web Services Recharg

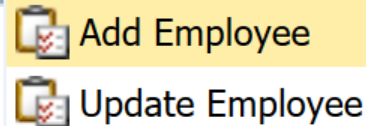
Forecast Employees by Account 6 **Modify Monthly Forecast by Account 6**

Scenario:Jul Forecast Version:1st Draft

	BegBalance	YearTotal	Q1	Q2
GOODWIN,LEVITA - 60850019D P9097151 IM202A - It Project Manager Senior	70,000	70,000	17,500	17,500
Total Employee	70,000	70,000	17,500	17,500
Total Position		17,780	4,445	4,445
Total Job Title		17,780	4,445	4,445

- On First tab forms, Right Click on row to Add or Update Employee

IM202A - It Project Manager Senior



- Update pop up dialog boxes as necessary and Click OK

Runtime Prompts - Add Employee

Prompt Text	Value
* 1:Select Employee	"60850019D"
* 1:Select Job Title	"IM202A"
* 1:Select Sub Account	"SL1200"
* 1:Enter Annual Comp:	
* 1:Enter Alloc Pay %:	100
* 1:Enter Start Month:	July
* 1:Enter End Month:	June
* 1:Select ACCOUNT 6:	"244804_V01"
* 1:Select Positions:	"P9097151"
* 2:Select ACCOUNT 6:	"244804_V01"

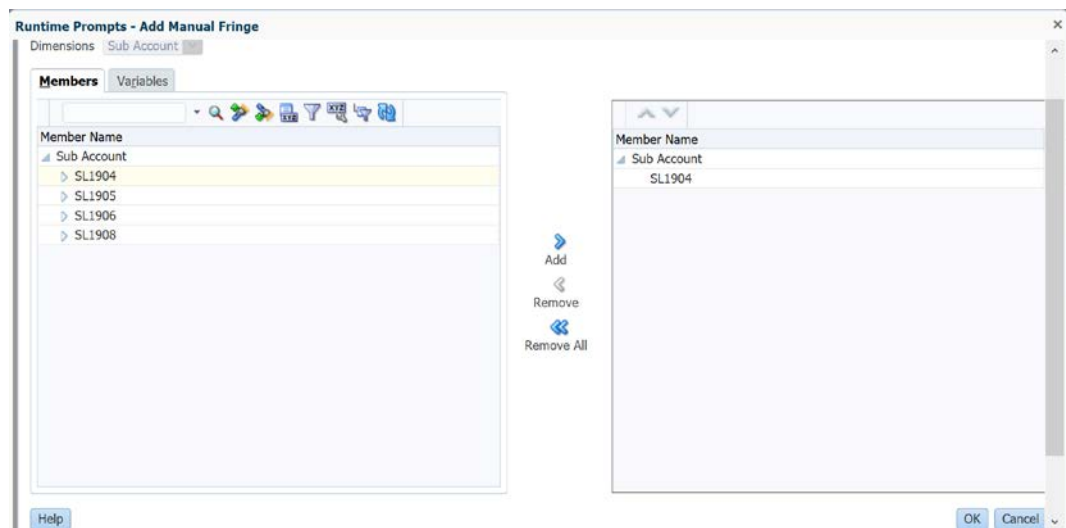
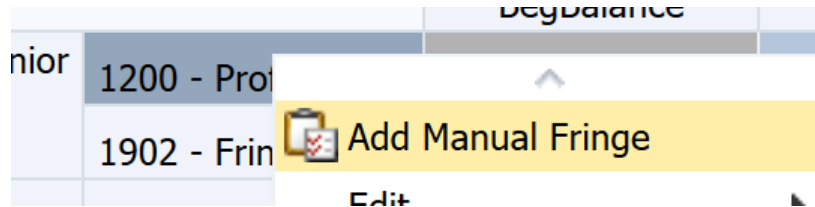
Only Update Target Fields

Runtime Prompts - Update Employee

* 1:Source Account 6	"244804_V01"
* 1:Source Employee	"60850019D"
* 1:Source Job Title	"IM202A"
* 1:Source Sub Account	"SL1200"
* 1:Source Position	"P9097151"
* 1:CHANGE TO ACCOUNT 6:	"244804_V01"
* 1:TARGET EMPLOYEE:	"60850019D"
* 1:TARGET JOB TITLE:	"IM202A"
* 1:TARGET SUB ACCOUNT:	"SL1200"
* 1:TARGET POSITION:	"P9097151"

UCSAL

- On Second tab forms, Right Click on row to Add Manual Fringe
- Update pop up dialog boxes as necessary and Click OK
- New row is added to all data entry



UCBUD

- YTD Variance Forms
- Same Forms, Same Function as Budget
- Actuals Loaded for Closed Months
- Pre-Seeded with Prior Forecast in Out Months

UCBUD - 5. Unit - Enter Forecast by Account6 x Search: Adv

Forms

Form Folder

- Forms
 - Budget Office Forms
 - Unit Forms
 - Budget
 - Report Views
 - Submit to Budget Office
 - Monthly Forecasts**

Forms in Monthly Forecasts

- Form
 - 1. Unit - YTD Variance
 - 2. Unit - Year Total Variance
 - 3. Unit - YTD Forecast Variance
 - 4. Unit - Year Total Forecast Variance
 - 5. Unit - Enter Forecast by Account6**
 - 5A. Unit - Enter Forecast by Ledger
 - 6. Unit - Enter Forecast by Subaccount
 - 7. Unit - Enter Forecast by Account10

5. Unit - Enter Forecast by Account6


UV_Unit: 44 - Information Technology Services

427050 - Its - Osm - Operational D

			Budget to Forecast	2019	2019		
			Variance	Budget	Jul Forecast		
			for	Final	1st Draft		
			YearTotal	YearTotal	YearTotal	Jul	Aug
1200 - Professional	K45	7	0				
1902 - Fringe	L10	2	0				
4900 - All Other Services	M40)	0				
3800 - Postage-Mailing-Shipping	M40)	0				
3000 - Business Meals-Social Activities	M40)	0				
2900 - Duplicating-Printing	M40)	0				
4200 - Telephone-Telegraph-Telex	M40)	0				
3300 - Maintenance-Repair Costs	M40)	0				
3700 - Physical Plant Department Services	M40)	0				
3900 - Professional Development	M40)	0				

UCBUD

- Right Click on Row to Add Acct10 Combo

3800 - Postage-Mailing-Shipping	M40	
3000 - Business Meals-Social Activities	M40	 1. Add Acct.10 Combo

- When mapping does not exist, Use Add New Account 10 Combination



The screenshot displays the UCBUD system interface. On the left is a sidebar titled 'Forms' containing a 'Form Folder' and a list of forms under 'Forms in Monthly Forecasts'. The form '8. Forecast by New Acct. 10 Combination' is selected. The main window shows the title '8. Forecast by New Acct. 10 Combination' and a header with '427050 - Its - Osm - Operational D' and '3000 - Business Meals-Social Activ'. Below this is a table for the year 2019, labeled 'Jul Forecast 1st Draft'. The table has columns for Jul, Aug, Sep, Oct, Nov, Dec, and Jan. The first row is labeled 'No SBR' and the second row is empty.

2019 Jul Forecast 1st Draft							
	Jul	Aug	Sep	Oct	Nov	Dec	Jan
No SBR							

The amount will display on forms below V99 until the Budget Office maps it.

UCBUD

- Agg Forecast
- Submit Forecast

Open Forms
and Click Save

9. Agg Exec. Level - Fcst

Sub Account: Total Sub Account Version: 1st Draft UV_Unit: 44 - Information Technology Services

44 - Information Technology Serv

	Jul Forecast 2019 ▶ YearTotal
A05 - Tuition	
A06 - Undergraduate Tuition Allocated	
A10 - Fees	
A40 - Unrestricted Financial Aid	
A41 - Restricted Financial Aid	

UCBUD - 2. Copy Draft to Submission - Forecast Search:

Years: FY19 Scenario: FM00 UV_Unit: FAS_44

Forms

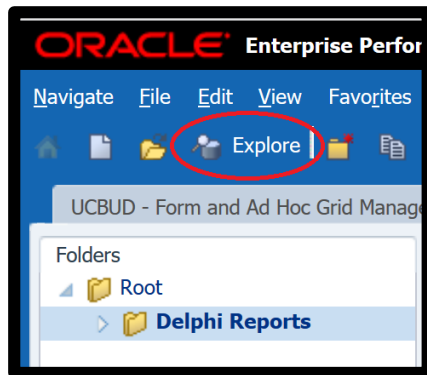
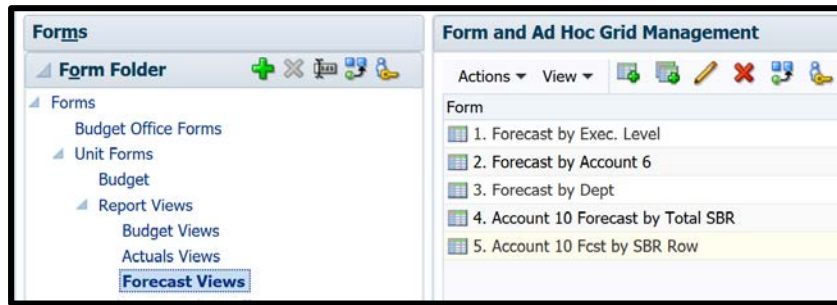
- Form Folder
 - Forms
 - Budget Office Forms
 - Unit Forms
 - Budget
 - Report Views
 - Submit to Budget Office**
- Forms in Submit to Budget Office
 - Form
 - 1. Copy Draft to Submission - Budget
 - 2. Copy Draft to Submission - Forecast**

2. Copy Draft to Submission - Forecast

	YearTotal	
	1st Draft	Submission
A05 - Tuition		
A06 - Undergraduate Tuition Allocated		
A10 - Fees		
A40 - Unrestricted Financial Aid		
A41 - Restricted Financial Aid		
B05 - Federal Faculty Support		
B06 - Federal OAA Support		
B07 - Federal Staff Support		

Reports

- Both UCSAL and UCBUD has a Report Views folder within the application. Reports that can be opened in SmartView or Download to Excel
- Explore Delphi Reports



415 - Employee Compensation Comparison			
FY19	Jul		
Total Employee		Actual Final	Budget Final
44 - Information Technology Services			
AGUILAR,MARLON - 60525309Q	427340 - Its-Asts Audio Visual		
AHMED,NAEL - 10781480V	244910 - Its Support Services Desktop Engineering		
AHMED,MOHAMMAD - 80350214N	427333 - Its - Ats - Academic Technology Solutions		

140 - Schedule 1 - Forecast vs Budget YTD	Financial Reporting	7/8/18 8:58 PM
145 - Schedule 1 - Forecast vs Budget FY	Financial Reporting	7/9/18 9:59 PM

QUESTIONS