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How to Get Permissions to Access to HUBS

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You or your manager should contact the [Authorized Requestor](#) for your school or unit. The Authorized Requestor will work with you and your manager to determine the level of access needed for your job. Your Authorized Requestor will then submit the request for access to FSS Client Services who will grant the access in HUBS.

Browser Settings and Desktop Configuration

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Web Browser

HUBS is web-based, and Internet Explorer (IE) is the [University supported browser](#) for financial applications. The recommended IE version is 8. HUBS can also run in Firefox version 3.6. Be sure pop-up blockers are disabled in Firefox. The needed IE settings for HUBS are listed below and apply to IE versions 7 & 8:

- 1. All pop-up blockers should be disabled**
 - a. Open IE, select the Tools menu.
 - b. Select Pop-up Blocker in the Tools menu, and if the blocker is not off, you will see the selection Turn off Pop-Up Blocker – select it.
- 2. Check for newer versions of stored pages every time I visit the webpage**
 - a. Open IE, select the Tools menu, select Internet Options.
 - b. In the General tab, under Browsing History click on the Settings button.
 - c. For the question Check for newer version of stored pages, choose Every time I visit the webpage.
 - d. Click on the OK button to save the change.
- 3. Security Settings in Trusted Sites: Downloads and Allow script –initiated windows without size or position constraints = Enable**
 - a. Open IE, select the Tools menu, select Internet Options.
 - b. In the Security tab under select a Zone to View or Change Security Settings, click on Trusted Sites.
 - c. Under Security Level for this Zone, click on the Custom Level button and the settings page displays.



- d. Scroll almost half way down the settings and look for Downloads. There are three download settings: Automatic Prompting for File Downloads, File Download and Font Download. Set these three settings to Enable in order to download reports from HUBS.
 - e. Scroll down a bit more and look for the Miscellaneous section and this question: Allow script-initiated windows without size or position constraints- select Enable.
 - f. Click on the OK button and answer Yes to the question "Are you sure you want to change the settings for this zone?"
- 4. Include http://*.cadm.harvard.edu & https://*.cadm.harvard.edu in trusted sites**
- a. Open IE, select the Tools menu, select Internet Options.
 - b. In the Security tab under Select a Zone to View or Change Security Settings, click Trusted Sites.
 - c. Under Security Level for this Zone, click on the Sites button and the Trusted Sites page displays.
 - d. If http://*.cadm.harvard.edu & https://*.cadm.harvard.edu do not appear in the Websites box, add them. Type one address in the Add this website to the zone box, click on the Add button and site will be added to the Websites box below; add the other address.
 - e. The checkbox for Require server verification (https:) for all sites in this zone should be unchecked when you leave the screen, but you may need to check it to add the addresses above.
 - f. Click on the Close button to save changes.

Desktop configuration considerations

SmartView is an Excel plug-in that allows planners to view and manipulate HUBS data in Microsoft Excel. Check with your Tub Finance Office to see if the SmartView option is in use by your school. If so your local IT group will need to install the add-in to your workstation. Guidance is available to local IT groups in the SmartView Installation tab in the HUBS iSite: <http://hubs.fad.harvard.edu>.

How to Launch HUBS

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Open your web browser and go to this URL to arrive on the HUBS log in page:

<https://hyp-workspace.cadm.harvard.edu:8080/workspace>

The Status Messages box is where you will see updates about HUBS like the date of the last actuals load, planned outages for system upgrades and enhancements, and other announcements of interest.

Enter your HUID and PIN, click the

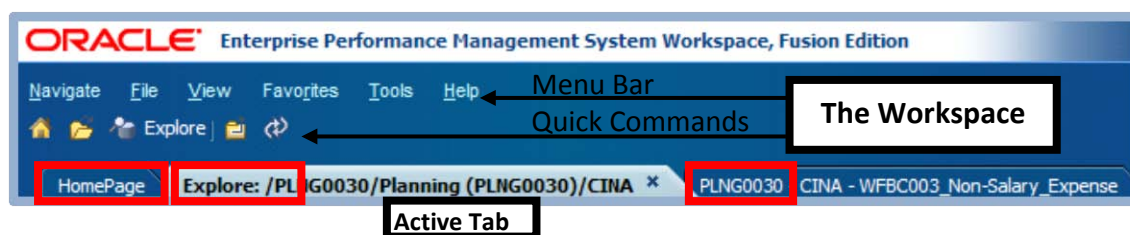
Log On button and you will be brought to the HUBS Home page which is described in the next section, *Basic Navigation*.

Basic Navigation

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There are two main areas in HUBS in which work is accomplished: Explore and the Planning Application. In general, Explore is where reports are run, viewed, and downloaded to other applications, e.g. Excel, and the Planning Application is where budget data is entered or modified or viewed.

When you navigate to Explore or the Planning Application they will open as tabs in a common area known as the Workspace. Above the tabs, in the Workspace area, you will see menus and quick command icons that navigate or execute functions. Depending upon which tab you are in, the active tab, the menus and quick commands will adjust, showing only items appropriate for that tab. Just click on a tab to make it the active tab. Likewise when you open an item within Explore or the Planning Application a tab will open for that particular item, like a report for example.



There are many ways to navigate to Explore or the Planning Application and you will find the best way for you as you become familiar with HUBS. For beginners it is best to start from the HomePage, and the HomePage will automatically display when you log into HUBS.

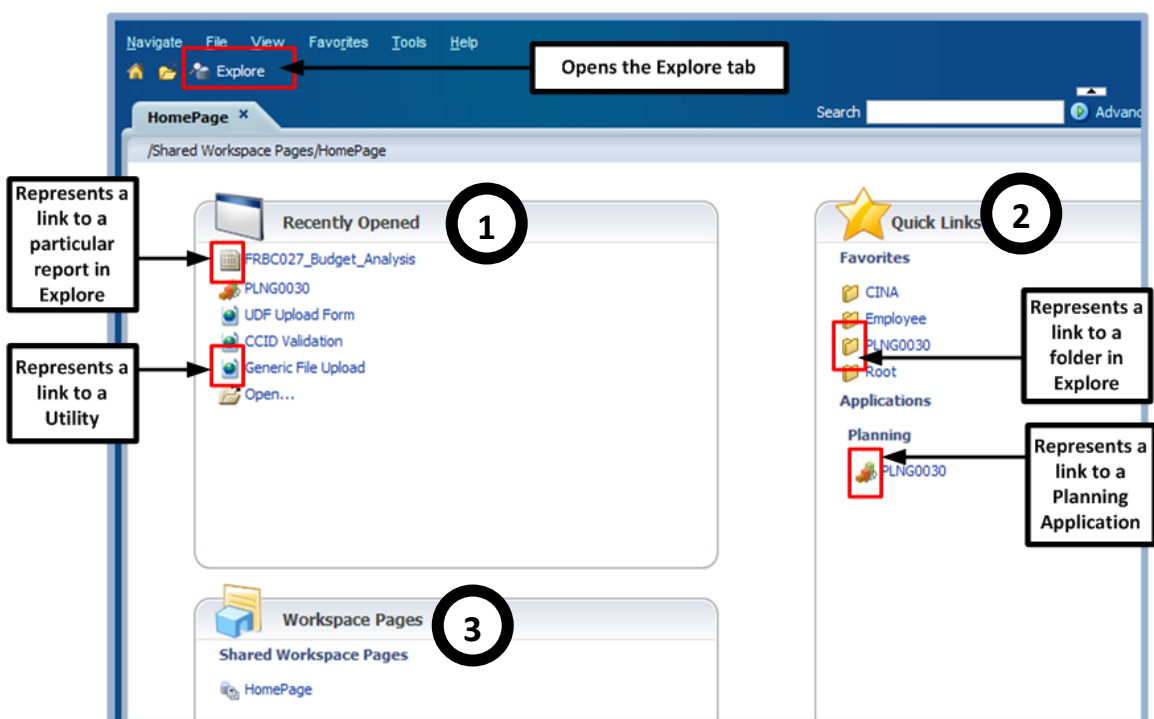
TIP: With many tabs open you may lose track of the HomePage or the Explore tab; click on the House icon in quick commands to go back to the HomePage and the Explore icon to go back to the Explore tab.

TIP: Some of the items available in the menus mentioned above are also accessible in a webform or report. For example, when you are in a data entry webform, the file menu above the webform includes options to insert a comment or supporting detail, however, one can right-click in a data entry form cell and get the options to add a comment or supporting detail from there as well.

HomePage

This is where new users will arrive when they first log into HUBS and it provides direct links to the following:

1. **Recently opened** items will accumulate once you begin to use HUBS. The last ten items you visited are displayed. The “Open” folder icon at the bottom of the list is another way to navigate to items in the Explore folders.
2. **Quick Links** list items you flagged as **Favorites**. When you are in an open tab, a report for example, go to the **Favorites** menu and select **Add to Favorites** and a direct link to that particular report displays in the Quick Links. Quick Links also provides a direct link to every planning application that you have access to.
3. **Workspace Pages** contains links to pages the HUBS administrator has created.

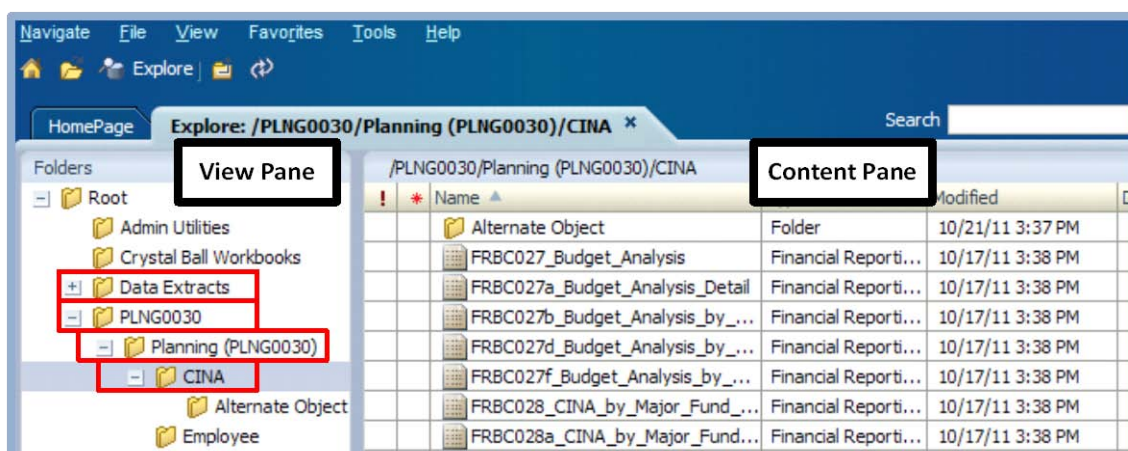


Explore

The Explore tab lists all the HUBS reports in use by your school as well as any documents that may have been uploaded by your school. Open the root folder and then open the folder for your planning application. Keep opening folders until you see the folder you want and then click on the folder to see its contents. For example, click on the CINA folder to see the CINA reports as shown below; click on a particular report to run the report.

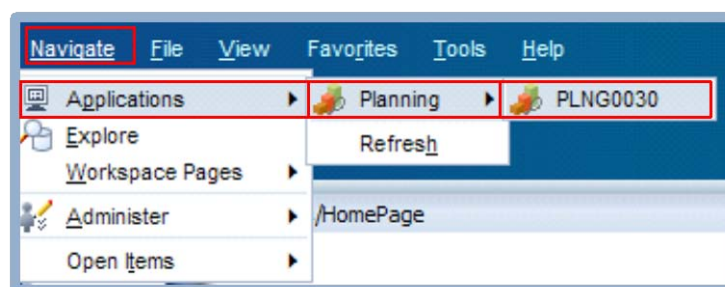
The section on the left is known as the View Pane and the right is the Content Pane.

TIP: To open a folder, click on the plus sign to the left of the folder. Once a folder is open, the plus sign becomes a minus sign. Click on a minus sign to close a folder.

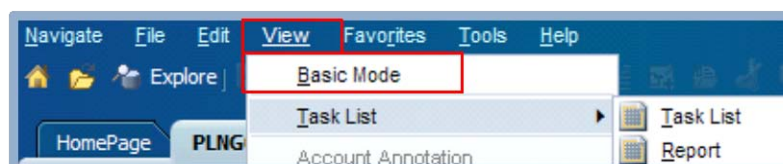


Planning Application

The Planning Application is where budget data is entered, modified, or viewed. Open your Planning Application through a link on the homepage or by the Navigate menu:
Navigate > Applications > Planning > PLNGXXXX:

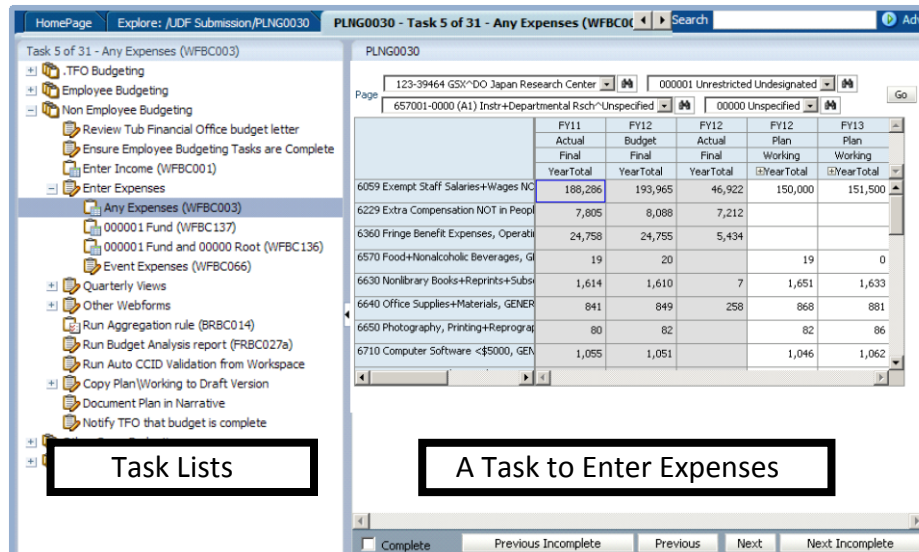


When new users first arrive in their planning application they will be in what is called Advance Mode. Planners should switch to Basic Mode in order to work with their school or unit Task Lists. From the **View** menu select **Basic Mode**:



The Task Lists you see were developed by your school or unit based on their budget process – it guides you through the budgeting process. An example of task lists is shown below. The tasks are listed in the View Pane on the left and a particular task to enter

expenses in webform 0003 is selected; webform 0003 therefore appears on the right. For some tasks you will need to leave the Planning tab to execute the task. For example a task that requires you to run a report must be done in the Explore tab. See the work instruction ***Using Task Lists*** for more information.



Setting Preferences in HUBS

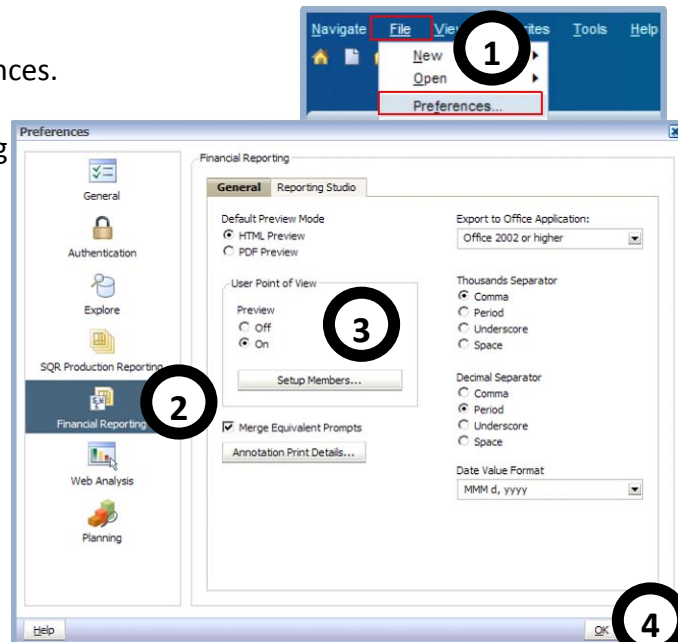
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As you become familiar with how HUBS works, you may find that you will want to adjust preferences. To begin, only the preferences below must be set to use HUBS properly:

Financial Reporting Preferences

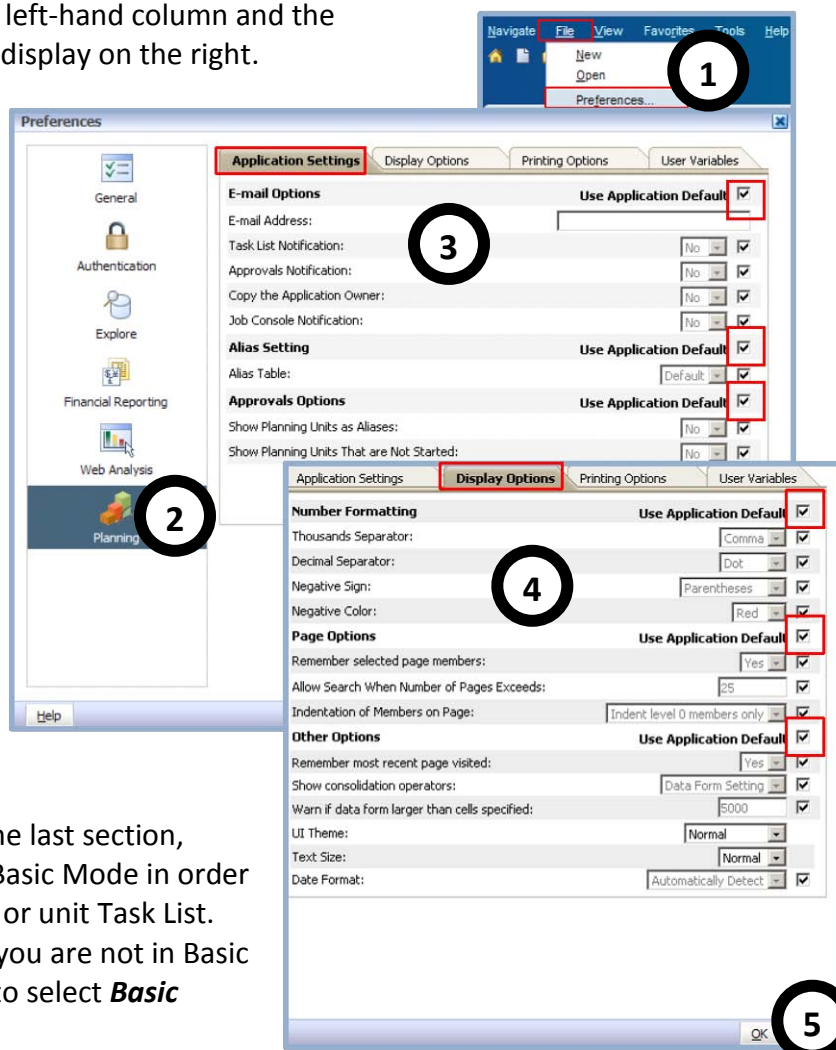
1. Select the File menu, then Preferences.
2. Select Financial Reporting in the left-hand column and the reporting preferences display on the right.
3. For the User Point of View, Preview, select On.
4. Click OK to save the change.

Note: The recommended Default Preview Mode for reporting is HTML since the HTML preview is exportable to Excel, allows annotations to be added, and allows drilldown in reports that include the drilldown feature.



Planning Application Preferences

1. Open your planning application and select the File menu, then Preferences.
2. Select Planning in the left-hand column and the planning preferences display on the right.
3. In the Application Settings tab, check the box Use Application Default for Email-Options, Alias Setting, and Approvals Options.
4. In the Display Options tab, check the box Use Application Default for Number Formatting, Page Options, and Other Options.
5. Click OK to save the changes.



Note: As mentioned in the last section, planners should work in Basic Mode in order to work with their school or unit Task List. Select the **View** menu, if you are not in Basic Mode there is an option to select **Basic Mode** in the menu.

Helpful Terms

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Here are the most basic, common terms used in HUBS. See the **HUBS Dimensions and Terminology** in Eureka, <http://eureka.harvard.edu>, for more details and more terms.

Cube: A database within HUBS. The **CINA Cube** is where non-employee budgeting and reporting occurs and the **Employee Cube** is where detailed employee budgeting occurs.

Webform: Webforms are spreadsheet-like grids with rows and columns for entering, modifying or viewing data in the HUBS Planning Application.

Financial Report: Reports found in HUBS are used to facilitate the analysis of data, variance analysis, exception reporting, and data validation. Reports are contained in the Explore tab.

Business Rules: Business Rules are calculations used in the Planning Application. For example, there is a business rule in the Employee Cube that calculates the monthly salary and fringe expenses based on the annual salary, FTE and a few other details entered by users. Some rules are user initiated and others run automatically.

Dimensions: Dimensions are the elements that describe and hold data. In HUBS, dimensions include Chart of Accounts segments like fund and time periods such as month, quarter and year.

Scenario and Version: A subset of dimensions that describe the budget you are working with are scenario and version. In HUBS-speak you may notice that the scenario always appears first, then the version. For example, Budget Final indicates that you are working with the final copy of the budget that was submitted to the University for a given year. Another example is Plan Working. Plan Working is the only scenario and version that can be edited in HUBS. You may be working with Plan Working for the current fiscal year which is often referred to as the forecast year, or the next fiscal year which is often referred to as the budget year.

Logging Off

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To log off of HUBS, select the **Log Off** link at the top right-hand side of the Workspace.

30 Minute Session Timeout

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In accordance with the Harvard Enterprise Security Policy, there is an automatic 30-minute session time out built into HUBS. After 30 minutes of inactivity, you will be logged out of the HUBS and will have to login in again. Please note the following concerning the session time out:

- If you have unsaved changes in a webform, you will receive a message warning you that you have unsaved data. If you select YES to save the data, the data will be saved. Afterward, you will be prompted to login in again and the system will return you to the login page.
- If you do not wish to save the data, select No and you will be prompted to login again.

System Availability[top](#)

HUBS is available during normal working hours, but becomes unavailable around 10:00pm each night, until the start of business the next morning – usually at 7:00am. During the overnight period regular maintenance processes occur in HUBS. To name a few, these processes include the loading of dimension and user defined files (UDF); updating HUBS with new chart of accounts (CoA) values and financial actuals; and the running of system wide business rules. At other times HUBS will become unavailable in order to install new features and enhancements. Communication will be sent to users in advance and will also be posted on the Logon page under Status Messages.

Where to Get Help[top](#)

For help associated with your school or unit's specific budget process, contact your local finance office or your Tub Finance Office (TFO).

Within HUBS, you can get context sensitive help by selecting Help link at the top right-hand side of the Workspace or Help from the Menu bar.

Job aids, on-line courses and a schedule of upcoming instructor led courses can be found in Eureka: <http://eureka.harvard.edu>. You may register for instructor led courses in PeopleSoft.

The HUBS iSite also provides various update for HUBS users:
<http://hubs.fad.harvard.edu>.

For additional help in using HUBS, or to report a system problem, contact the UIS Help Desk at 617-496-2001 or via email: uis_helpdesk@harvard.edu.