

Hyperion Meeting for Returning Districts

Presented by Kay Pugh & Kimberly Harrison | October 30, 2018

Hyperion Districts

- | | |
|--|---|
| <ul style="list-style-type: none">• Coronado• Del Mar*• La Mesa-Spring Valley• Lakeside*• Lemon Grove• National | <ul style="list-style-type: none">• Oceanside*• Poway*• Ramona*• San Marcos• SDCOE* |
|--|---|

* = Registered for 10/30/18 meeting

AGENDA

Hyperion Refresher (9:30-10:30 am)

- A review of the Hyperion big picture, a checklist, a month-by-month scenario, reminders, and how Hyperion calculates
- Support tools include HEAT, guide, videos, 1:1 work sessions

What's New? (10:30 am - 12:00 pm)

- New members have been added to the Additional Earnings parent. Users can now see 94 members
- Element definition for the additional earning members have been fixed. Additional earnings that are not subject to retirement won't have retirement calculated.
- Worker's Compensation and ARS members have been moved from the Benefits parent to the Employer-paid Taxes parent
- Three new forms were created.

Questions & Answers (12:00 - 12:30 pm)

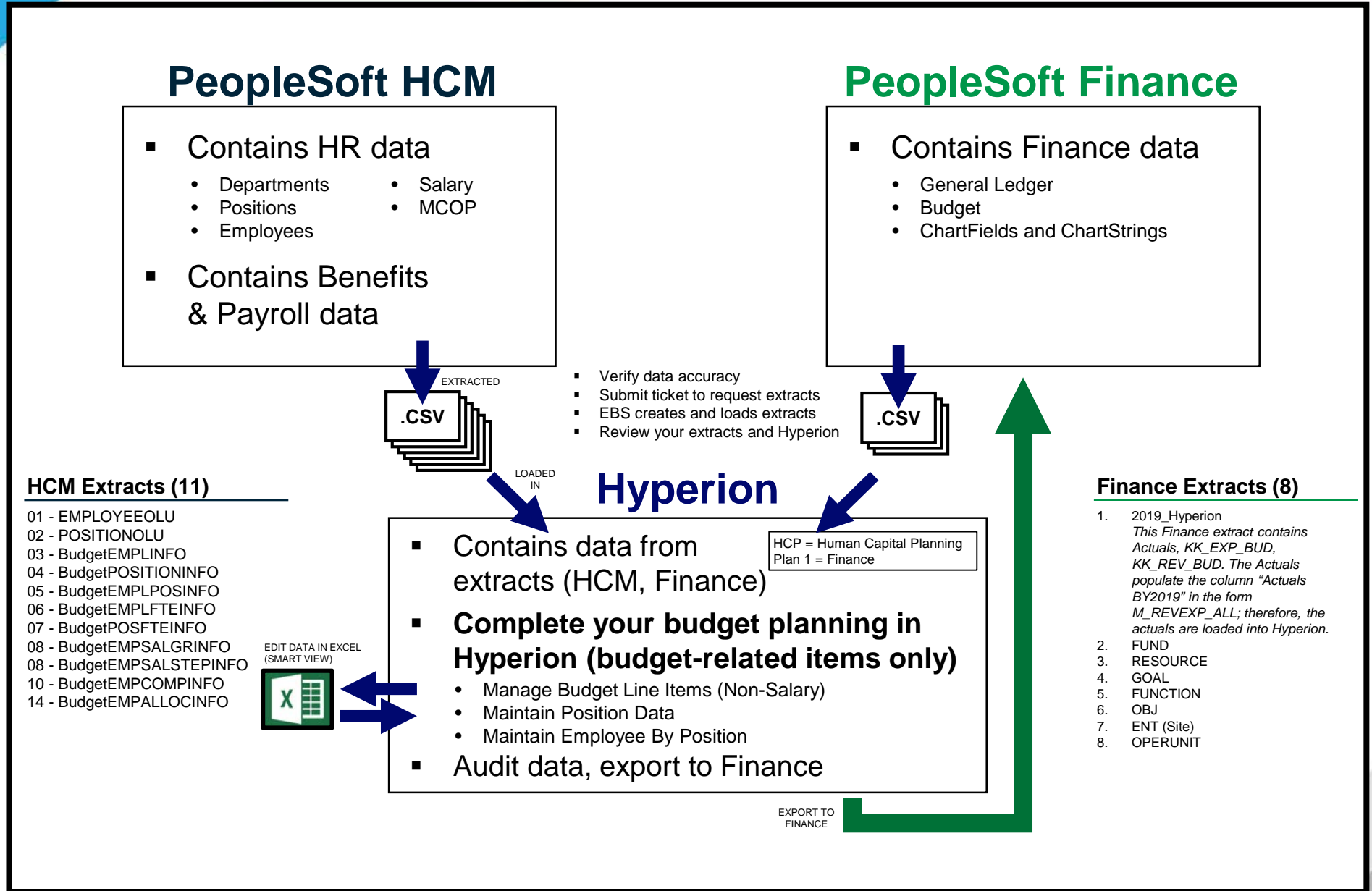
- Time for general questions & answers

Hyperion Refresher

A review of the Hyperion big picture, a checklist, a month-by-month scenario, reminders, and how Hyperion calculates

HYPERION BIG PICTURE

How PeopleSoft HCM,
Finance, and
Hyperion Fit Together



Hyperion Checklist

Task	District	EBS	CRC
BEFORE PRODUCTION IS PREPARED			
<input type="checkbox"/> 1. Make sure HCM is correct. Check your Departments, Department Budget Table, Positions, and Employee data carefully.	•		
<input type="checkbox"/> 2. Create a HEAT ticket and attach the form to request that your extracts be created and HCM/Finance data are loaded into Hyperion Production.	•		
<input type="checkbox"/> 3. Close the ticket indicating that the extracts have been loaded into Hyperion and are available for download from Secure File Transfer System (SFTS).			•
<input type="checkbox"/> 4. Download the extracts from SFTS. Review extracts carefully to ensure that information is correct.	•		
<input type="checkbox"/> 5. Review data in Hyperion to ensure that information is correct. Notify CRC of any issues with the extract by submitting a new HEAT ticket (if data is correct in HCM but not in extract/Hyperion).	•		

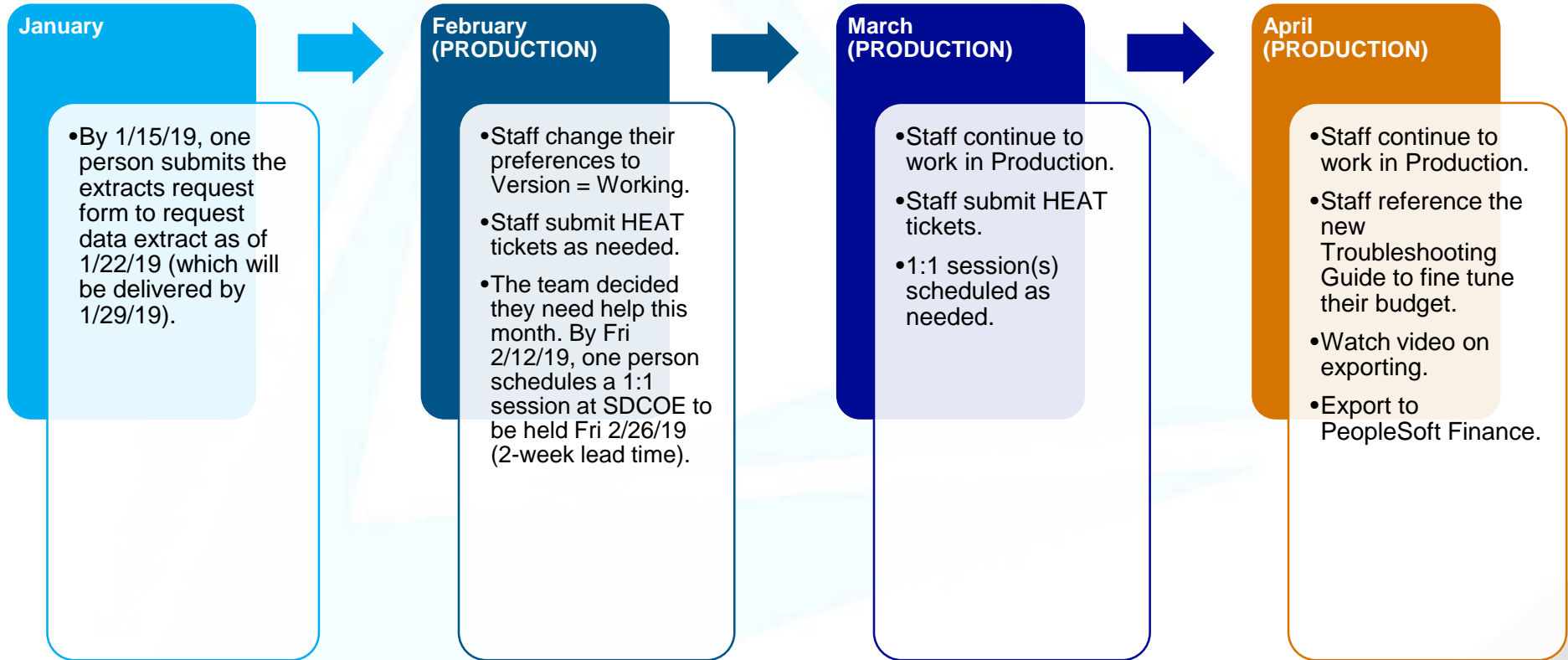
Task	District	EBS	CRC
PRODUCTION			
<input type="checkbox"/> 6. Enter/verify your user preferences.	•		
<input type="checkbox"/> 7. Manipulate data in Hyperion (add/update/delete). <ul style="list-style-type: none"> ▪ Set up Defaults ▪ Manage budget line items (non-salary) ▪ Maintain position data – <i>For FTEs</i> ▪ Maintain employee by position 	•		
<input type="checkbox"/> 8. Schedule 1:1 work sessions(s), if desired.	•		
<input type="checkbox"/> 9. Audit data.	•		
<input type="checkbox"/> 10. Export to PeopleSoft Finance.	•		

Task	District	EBS	CRC
ONGOING			
Configure and prepare Hyperion.		•	
Create extracts for districts.		•	
Set up users and roles in Sandbox/Production.			•
Create documentation.			•
Conduct training and Open Labs.			•
Provide Help Desk support (via HEAT tickets).			•
Write and send announcements/communications.			•
Notify CRC of any assistance needed (issues, training, questions) or security requests (new Hyperion user, change in role, reset a forgotten password) by submitting a HEAT ticket.	•		

Month-by-Month Example

Scenario: A district wants to start using Hyperion in February with data as of 1/22/2019. Their goal is to use Hyperion in February, March, and April and be done by the end of April.

EXAMPLE ONLY!
Your district will follow its own schedule.



How to Request Extracts and Data Load

Directions:

1. Identify the date that you want the extracts to be created. This should be at least 1 week from date of request.
2. Make sure HCM is correct. Check your Departments, Department Budget Table, Positions, and Employee data carefully.
3. Download the [Hyperion Extracts Request Form](#) (PDF) from the CRC Website and complete it.

Only one person needs to complete the form.

TIP: Download the file to your computer to use the “fillable” fields.

II. Request Form

Contact Information			
1. Organization Name		2. Date Form Submitted on HEAT Ticket	
3a. Contact Name	3b. Phone #/Extension	3c. Email Address	
Extract Request Options			
4a. Current Year	4b. Budget Year	4c. Load Pseudo spreadsheet from previous year?(Y/N)	4d. Load new Pseudo spreadsheet?(Y/N)
5a. Finance Extracts Date To Be Run <i>This must be a future date.</i>	5b. Finance Business Unit #	5c. Fiscal Year	
5d. Identify any other object codes outside of the Object range 1000000-3999999 that are being used as a salary object. Example: Object 52#####			
6a. HCM Extracts Date To Be Run <i>This must be a future date.</i>	6b. HCM Company #	6c. Step Advance File? (Y/N) Y = File desired N = Not desired	
7. Additional Comments			

How to Request Extracts and Data Load

Directions (continued):

4. Create a HEAT ticket and attach the form to request that your extracts are created and HCM/Finance data are loaded into Hyperion Production. Provide 2 weeks for the request to be fulfilled from the date that you submit your ticket.
5. If there are others on your team who work in Hyperion, be sure to let them know that you submitted the ticket and indicate the date that the data will be loaded (based on the date you specified on the form).
6. The CRC will close the HEAT ticket with a solution that indicates that the extracts have been loaded into Hyperion and are available for download from Secure File Transfer System (SFTS).
7. Confirm with your team that the extracts have been loaded.
8. Download the extracts from Secure File Transfer System (SFTS) at <http://bssftp.sdcoe.net>.
9. Review extracts carefully to ensure that information is correct.
10. Review data in Hyperion to ensure that information is correct.

EXAMPLE

Mon 1/15/19

Date that HEAT ticket is submitted with request form attached

Mon 1/22/19

Date that extracts should be pulled

Mon 1/29/19 (2 weeks from HEAT ticket)

Date by which extracts will be loaded (and available at SFTS)

How to Request Extracts and Data Load

Q: What if I find errors when I review my extracts and Hyperion?

A: If you find errors because your HCM data was inaccurate, you will need to fix your data in HCM and Hyperion.

If you find significant errors that require you to make a major fix in HCM, you may request that a new batch of extracts is created and loaded into Hyperion.

Reminders: Getting Started

Log in

- Use Internet Explorer.
- Go to the PeopleSoft Portal at <https://peoplesoft.erp.sdcoe.net>. Click Hyperion.
- This environment contains your current data (from the Spring). When you are ready, it will be loaded with your Production data.
- Log in with your User ID (Employee ID) and Hyperion password.

Navigate to your Application (District)

- Navigate > Applications > Planning
- Click on your **Application** (District #, like *DST010*)

Verify fiscal year

- Administration > Manage > Variables > Substitution Variables tab
- EBS will update CY (FY19) and BY (FY20) at the time that the extracts are loaded
- Verify the settings – **Only 1 Hyperion user needs to do this (like an Admin)**

Set up your preferences

- File > Preferences > Planning
- User Variable Options (Scenario, Version, Year) – **Each Hyperion user needs to complete this setup.**
- Member-Name: Alias Display – **If you set this up last year, you do not need to do it again.**
- Commas – **If you set this up last year, you do not need to do it again.**

Additional Reminders

- Be sure to validate your data in HCM prior to requesting your extracts to be loaded into Hyperion.
- In Hyperion, the “Site” comes from your Department in HCM.
- Be aware of the 45-minute timeout.
- All of the detail information should be on the Incumbent line, not the Vacancy line
- Vacancy line will only have FTE
- For vacancies, assign a To-Be-Hired employee and budget on the Incumbent line (not the Vacancy line)

How Hyperion Calculates

Expense									
Entity: S110 Parkway Middle			Position: P_10201100 Principal			Employee: EM_350607 Svuekznceudk-Kkotmscaawlfuqw			
Current Year of View: FY20									
	YearTotal	Jul	Aug	Sep	Q1	Oct	Nov	Dec	Q2
Basic Salary Expense	141,570	11,797.5	11,797.5	11,797.5	35,392.5	11,797.5	11,797.5	11,797.5	35,392.5
Benefits Expense	28,734.85	1,702.38	1,702.38	2,533.01	5,937.77	2,533.01	2,533.01	2,533.01	7,599.03
Total Taxes	4,870.01	405.83	405.83	405.83	1,217.50	405.83	405.83	405.83	1,217.50
Total Compensation Expense	175,174.86	13,905.71	13,905.71	14,736.34	42,547.77	14,736.34	14,736.34	14,736.34	44,209.03
Gross Earnings	141,570	11,797.5	11,797.5	11,797.5	35,392.5	11,797.5	11,797.5	11,797.5	35,392.5
Taxable Compensation	141,570	11,797.5	11,797.5	11,797.5	35,392.5	11,797.5	11,797.5	11,797.5	35,392.5

Total Compensation Expense

- **Basic Salary Expense.** Calculated from the Override Option Value of the **salary plan-grade-step** found on the **Salary Grades** tab of the employee's detail.
- **Earnings Expense.** Calculated from the Override Option Value of the **additional pays** found on the **Additional Earnings** tab of the employee's detail. It can be a % or flat amount.
- **Benefit Expense.** Calculated from the Override Option Values of the **benefit members** found on the **Benefits** tab of the employee's detail.
- **Total Taxes.** Calculated based on the Override Option Values of the **employer-paid taxes** found on the **Tax Details** tab of the employee's detail.

How Hyperion Calculates

Calculating Basic Salary Expense

There are two factors in determining the Basic Salary Expense:

- (1) the monthly salary rate, and
- (2) the Option Start Date

Examples of calculating Basic Salary Expense:

Salary Plan-Grade-Step = \$101,000				
Annual Salary Spread	Monthly Rate			
Annual (12 months)	8,416.67 (\$101,000/12)			
Eleven Months/Custom (11 months)	9,181.82 (\$101,000/11)			
Ten Months/Ten_Months (10 months)	10,100.00 (\$101,000/10)			
		Month that the spread begins:		
Option Start Date	Annual Salary Spread	8,416.67	9,181.82	10,100.00
less than or equal to 07/01/20XX	12 months	July		
8/1/20XX	11 months		August	
9/1/20XX	10 months			September
	YearTotal	101,000.04	101,000.02	101,000.00

Support Opportunities

Support Tools

HEAT

- **Submit a ticket for:**
 - Questions
 - Issues
 - Guidance
 - Requests (Extract Request Form, Pseudo template, for example)

Guide

- Getting Started
- Admin & Coordinator Tasks
- Updating and Working with HCP Data
- Working With Extracts (see the HCM Extracts Key)
- Data Entry in Hyperion
- Smart View
- Manage Budget Line Items (Non-Salary)
- Maintain Position Data (FTEs)
- Maintain Employees By Position
- Audit & Export to PeopleSoft Finance
- Appendices (HCM Navigations)

Video Tutorials

- Employee History Report
- Hyperion Data Export to PeopleSoft Budget Import Template

Job Aids

- Troubleshooting
- Administration Export Data – Budget Upload Template Instructions
- Exception Hourly Employees in HCM – Conversion to Hyperion
- HCM Extracts versus Hyperion Audit Guidelines

1:1 Work Sessions

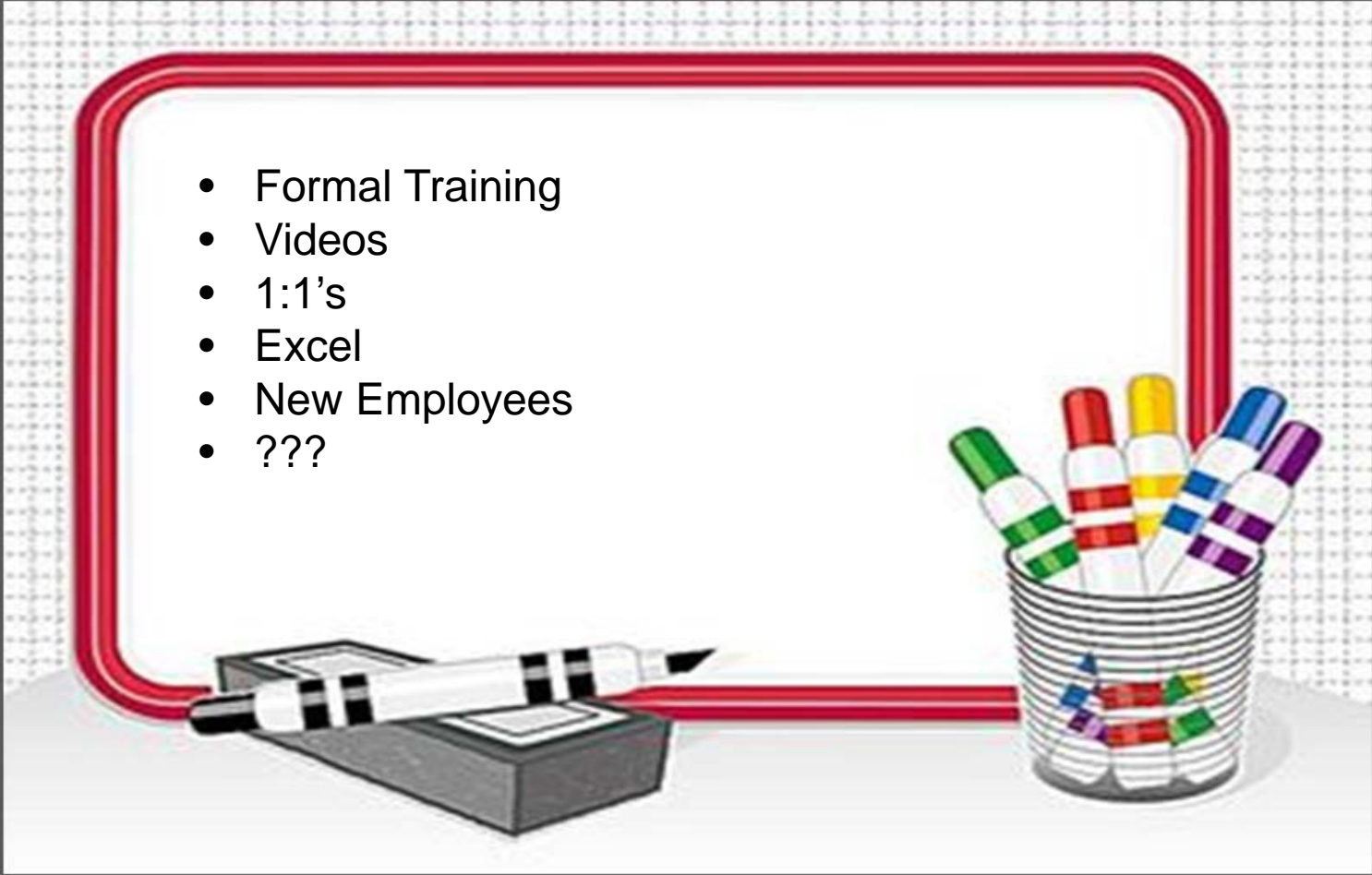
- Optional – as needed. These are in lieu of open labs.
- Schedule and attend 1:1 face-to-face work sessions held at SDCOE.
- To schedule: Contact Lori Free-Trout (lfreetrout@sdcoe.net). Provide 2-week lead time.

How to request a 1:1 work session

E-MAIL TEMPLATE

- **To:** Lori Free-Trout (lfreetrout@sdcoe.net)
- **From:** [You]
- **Subject:** Request for Hyperion 1:1 work session – DISTRICT NAME
- **Body of email:**
 - # of people attending: X
 - Names of attendees: List them here.
 - # of laptops requested: X
 - First choice date/time: X/X/19 *(Please provide 2-week lead time. Specify AM or PM.)*
 - Second choice date/time: X/X/19 *(Please provide 2-week lead time. Specify AM or PM.)*
 - Topics to address: List them here as a numbered list. Please be as specific as possible. If there are HEAT tickets to reference, please include the ticket #s.

Training – District Input

- 
- Formal Training
 - Videos
 - 1:1's
 - Excel
 - New Employees
 - ???

What's New?

Discussion of what's new and changes in process from last year

What's New?

- New members have been added to the Additional Earnings parent. Users can now see 94 members.
- Element definition for the additional earning members have been fixed.
 - Additional earnings that are not subject to retirement won't have retirement calculated.
- Worker's Compensation and ARS members have been moved from the Benefits parent to the Employer-paid Taxes parent.
- Three new forms.



M_Available and Assigned FTE

- This form will show the Available FTE and Assigned FTE per position per entity.
- The available FTE represents the FTE set up for that position; Assigned FTE represents the FTE that has been assigned to an incumbent.

Filled:

			YearTotal	
			Available FTE	Assigned FTE
S500	P_10175007	Vacancy	0	1

Overallocated:

			YearTotal	
			Available FTE	Assigned FTE
S100	P_00003515	Vacancy	(1)	2

Partially:

			YearTotal	
			Available FTE	Assigned FTE
	P_10176721	Vacancy	0.25	0.75

Vacant:

			YearTotal	
			Available FTE	Assigned FTE
	P_10173512	Vacancy	1	



M_New Position

- This form will list the New Positions

Period: BegBalance					Year: No Year					Scenario: Budget					Version: Working					Budget Item: Unspecified Budget Item				
Element: Unspecified Element																								
			Position Number	Position Name																				
210	New Position 2	Vacancy	10202907	Teacher																				
516	New Position 3	Vacancy	10205046	Director, Information Technolo...																				
521	New Position 5	Vacancy	5030	Library Services Liaison																				
536	New Position 6	Vacancy	5364	Paraprofessional Special Ed																				
543	New Position 7	Vacancy	9999	Principal																				
710	New Position 4	Vacancy	7016	Driver-Assistant Trainer																				



M_To be Hired

- This form will list the To-be-Hired employees.

Period: BegBalance					Year: No Year		Scenario: Budget		Version: Working		Budget Item: Unspecified Budget Item	
Element: Unspecified Element					Employee Number		Employee Name					
Unspecified Entity	Default Position	To be Hired 1	LB_EMP1	LB_EMP1								
		To be Hired 2	LB_EMP2	LB_EMP2								
		To be Hired 3	Employee Number LB_Position1_S0...	Employee Name LB_Position1								

Auditing and Extracts

HCM Data Auditing

HCM auditing prior to pulling extracts

posted Feb 16, 2017, 4:44 PM by Barbara Thiss

The following conditions in HCM may adversely affect the HCM Extract files.


- Multiple incumbents attached to a position (Each position should have only one employee attached to it).
- Any positional data being pulled from the JOB record and the position is vacant (Vacant positions should not be on a Job Record).
- Positions attached to multiple Department IDs on the Department Budget Table (Extract pulls position from only one Department Code/ID).
- Missing Holiday Schedules for exception hourly (Job Data – Payroll tab).
- Missing Employee's Assigned Work Schedule for exception hourly (Main Menu - Manager Self Service – Time Management – Manage Schedules – Assign Work Schedule).

Here are additional items to check in HCM:

- DBT - Make sure the Earnings chartfield is correct.
- Department Codes are correct – This may not be the funding Site code – change if desired.
- Job Empl Class - Union Code/Bargaining Unit.
- Job Indicator – Extract only pulls the Primary Job.
- Position FTE
- Position Location Code – Physical location of the position.
- Position Type – Single Incumbent or Pooled (not shared).
- Position Active/Inactive – Position status needs to match on the DBT and the Add/Update Position page.
- Employee FTE
- Employee Type – Regular or Temp.
- Annual Salary Spread – Job Data – SDCOE Job Data – Pay Schedule.
- Pay Type – Exempt or Non-exempt.
- Benefits – Check that all required benefits are included.
- Additional Earnings/MCOPs – Check that all applicable additional earnings & MCOPs are included.
- Step Advance dates – Check employee step advance dates.

HCM Data Auditing

- The [HCM Extracts versus Hyperion Audit Guidelines v1.1](#) job aid identifies the origin of the data and should help the auditing of the HCM Extract files.
- Examples: Job record, Position record, Department Budget Table, etc.



HCM Extracts Content and Audit Guidelines

Version 1.1 | October 16, 2018

This job aid lists the information on the HCM extracts and where it originates in HCM. You will use these guidelines to compare the extracts with your HCM data.

EMPLOYEES (from JOB record):

1. Job Indicator = P (Primary Job)
2. Includes exception hourly employees (Employee Type E)
3. Excludes employees where the latest action date has the Pay Status of TER (Terminated)

POSITIONDATA:

1. Include positions that are tied to an exception hourly employee
2. Include vacant positions where Reason Code does not equal INV (Inactive)

EMPLINFO:

1. Includes all employees in the EMPLOYEES file
2. Columns:
 - a. Point-of-View:
 - i. Site: Department ID on POSITION record
 - b. Employee Number
 - c. Employee Name
 - d. FT/PT: Full/Part on POSITION record
 - e. Employee Type: Regular/Temporary on POSITION record
 - f. Pay Type: FLSA status on POSITION record
 - g. Union Code: EMPL CLASS on JOB record
 - h. Location Code: Location on POSITION record
 - i. Hire Date: Last Start Date on JOB record
 - j. Annual Salary Spread: number of months checked on SDCOE Job Data tab
 - i. Where 12 months = Average
 - ii. Where 11 months = Custom
 - iii. Where 10 months = Ten_Months
 - iv. Where 9 months = Nine_Months

POSITIONINFO: Include all positions in the POSITIONDATA file

1. Point-of-View:
 - a. Site: Department ID on POSITION record
2. Position Number
3. Position Name
4. Position Type:
 - a. Max head count = 1: Single_Incumbent
 - b. Max head count >1: Pooled
5. Job: Job Code on POSITION record
6. Position Start Date: Budget Begin Date on the Department Budgets page
7. Position End Date: blank
8. Location Code: Location on POSITION record
9. Union Code: EMPL CLASS on JOB record
10. Adjustment Date: blank

SDCOE Customer Resource Center HCM Extract Contents v1.1 | 1

Extract Changes

EBS will provide 11 HCM and 8 Finance extracts

- 11 HCM extracts: 1, 2, 3, 4, 5, 6, 7, 8, 10, 14

- 01 - EMPLOYEEOLU
- 02 - POSITIONOLU
- 03 - BudgetEMPLINFO
- 04 - BudgetPOSITIONINFO
- 05 - BudgetEMPLPOSINFO
- 06 - BudgetEMPLFTEINFO
- 07 - BudgetPOSFTEINFO
- 08 - BudgetEMPSALGRINFO
- 08 - BudgetEMPSALSTEPINFO
- 10 - BudgetEMPCOMPINFO
- 14 - BudgetEMPALLOCINFO

- 8 Finance extracts

- 2019_Hyperion
This Finance extract contains Actuals, KK_EXP_BUD, KK_REV_BUD. The Actuals populate the column "Actuals BY2019" in the form M_REVEXP_ALL; therefore, the actuals are loaded into Hyperion.
- FUND
- RESOURCE
- GOAL
- FUNCTION
- OBJ
- ENT (Site)
- OPERUNIT

Pseudo Data Request Template

Pseudo positions can be set up for Substitutes, Extra Help, and Overtime

If your district wants to set up pseudo positions, download and complete the [Pseudo Data Request Template Information v1.0.xlsx](#), then attach it to a new HEAT ticket.

POSITION		EMPLOYEE		FTE	ALLOCATION (Total allocation for position/employee should be 100%)							SALARY (provide annual salary rate for Override Option Value)	OTHER COMPENSATION (Provide monthly rate for each type of compensation)												
POV Site	Position Descripti	Cert/Class	Employee Nam	(Provide Position FTE)	Fund	Resource	Goal	Function	Object	Site	OperUnit	PY	Percentage Allocated	Medical	Dental	Vision	Life Insurance	Retirement - ST	Retirement - PE	Retirement - AF	VCP	TAX-E	TAX-Q	TAX-U	
Example S001	S_333300 Substitute Teach	Certificated	SEM_33330 JCCS Metro	1	F0100	R0000333	G10	U1000	A_1100333	S222	L_Blank	PY_Blank	100	100,000.00	525	45	10	6	4.43	15.531	3.75	2.37	6.2	1.45	0.05

This is not a load file. This file is used to gather information.

RECOMMENDATION: All Pseudo Positions should be added to same POV site. This aids in locating the positions later.

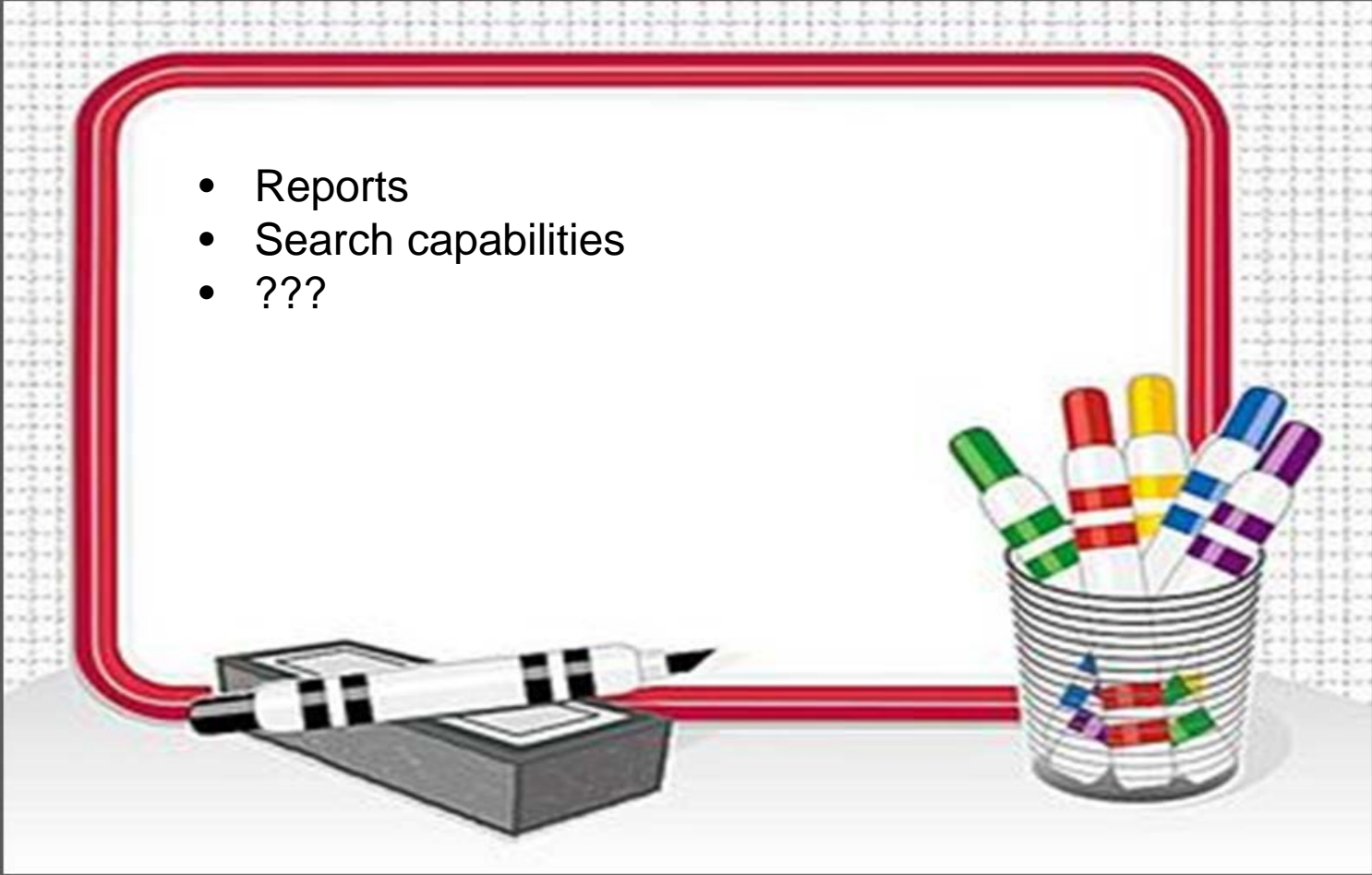
Future of Hyperion

Future of Hyperion

This is just one of the options we are considering.

- **PBCS: Planning & Budgeting Cloud Service**
 - Oracle's cloud-based Hyperion
 - Streamline processes with flexible workflow
 - Quickly create reports
 - Full Excel integration
 - Reporting with built-in management capabilities
 - Forecast performance accurately with rolling forecasts and best practices
 - Chrome, Firefox, and Safari compatible

District Input

- 
- Reports
 - Search capabilities
 - ???

Questions & Answers

Summary of Links

- **Sites:**
 - PeopleSoft Portal to access Hyperion: <https://peoplesoft.erp.sdcoe.net>
 - HEAT Self-Service: <http://hss.sdcoe.net>
 - Secure File Transfer System (SFTS): <http://bssftp.sdcoe.net>
- **Guides & Job Aids page for guides, forms, templates:** <http://crc.sdcoe.net/resources/peoplesoft/guides>
 - [Hyperion User Guide v2.2](#)
 - [Hyperion Extracts Request Form v3.3.pdf](#) (Form – download for “fillable” fields)
 - HCM Extracts versus Hyperion Audit Guidelines v1.1 (Job Aid)
 - [Employee History Report Template 10000 Lines - UNPROTECTED v1.0.xlsx](#) (Excel Template)
 - Pseudo Data Request Template Information v2.0.xlsx (Excel Template)
 - [Hyperion Role Assignment Request Form v1.0.xlsx](#) (Excel form)
 - Hyperion Troubleshooting Job Aid
- **Hyperion videos:** <http://crc.sdcoe.net/resources/peoplesoft/tutorials>
 - [How to Enter Data Onto the Employee History Report Template](#) (7:22)
 - [Hyperion Data Export to PeopleSoft Budget Import Template](#) (9:39)
- **Hyperion announcements:** <http://crc.sdcoe.net/announcements/hyperionnews>
 - “HCM auditing prior to pulling extracts” announcement:
<http://crc.sdcoe.net/announcements/hyperionnews/hcmauditingpriortopullingextracts>
 - Employee History Report announcement: <http://crc.sdcoe.net/announcements/peoplesoftnews/hyperionemployeehistoryreport>

Guides and Job Aids without links will be added to the CRC website soon.