

Hyperion Training Activity Sheet

HYP1: INTRODUCTION TO HYPERION

For use in training. Last updated January 19, 2018.

Directions: Complete Activities 1-7 to practice viewing data in Hyperion. Activities 1-3 are for Forms. Activities 4-7 are for My Task List. These are the navigations you will use:

Forms	1	M_All PositionCompBySite LEA > HCP Data View
	2	M_EMPINFO LEA > HCP Data View
	3	M_Expense_04 LEA > PLAN1 Data Forms
My Task List	4	Expense Budget Drill Down form Prepare & Review Budgets > Manage Budget Line Items
	5	View Edit Expense Budgets By Version form Prepare & Review Budgets > Manage Budget Line Items
	6	Maintain Position Data form Prepare & Review Budgets > Manage Position and Employee Data
	7	Maintain Employees by Position form Prepare & Review Budgets > Manage Position and Employee Data

Forms

Activity 1: M_All PositionCompBySite

- Navigate to **Form > LEA > HCP Data View**. Click the **M_All PositionCompBySite** form.
This form shows, by site, the total FTE, basic salary expense, benefits expense, earning expense, total taxes, and total compensation expense.
- What is the district **Total FTE**? _____
- What is the district **Total Compensation**? _____
- What does "S" in S310 stand for? _____
Which school is S310? _____
- Expand the **Total Compensation Expense** column. What is the **Basic Salary Expense** for S310?

- What is the **Benefits Expense** for S562 Child Nutrition? _____
- What is the **Total Compensation Expense** for Special Education? (You will need to find the entity in the list.)

Activity 2: M_EMPINFO

1. From **Form > LEA > HCP Data View**, click the **M_EMPINFO** form.
2. How many rows are on this form? How do you know? _____

3. Collapse the left pane to have more “real estate” on the page.
4. Locate Employee **EM_103023 Joan Cusack**.
 - Full time or part time? _____
 - Which Location? _____
 - 9, 10, 11 or 12 month employee? (Use Annual Salary Spread column to make this determination.)

5. Find **EM_293110**.
 - Employee Name? _____
 - Full time or part time? _____
 - Hire date? _____
 - Certificated or Classified? (Use the Union Code column.) _____
6. Find the **Location Code** column.
 - Right-click to sort the Location Code by ascending. Notice this puts the first location code L020110 at the top.
 - Change to a descending sort. Which location now appears at the top of the list? _____
 - Remove the sort.
7. Sort the **Employee Name** column by ascending. Remove the sort.

NOTE: The Filter option is not a viable solution for finding an employee by name (when you don't know the ID).

Activity 3: M_Expense_04

1. Navigate to **LEA > PLAN1 Data Forms**. Click the **M_Expense_04** form.
2. Enter the following in the POV and click the Go arrow.

S536 : S536 Special Education	F0100 : F0100 General Fund	G5750 : G5750 Special Educatio	L_Blank	U1110 : U1110 Special E
PY_Blank	R3310000 : R3310000 Sp Ed-Id			

Entity = S536, Fund = F0100, Goal = G5750, OperUnit = L_Blank, Function = U1110,
Project Year = PY_Blank, Resource = R3310000

3. Find these amounts.
 - What is the budget for **Major Object 1200**? _____
 - What is the **Total Expenditure Budget**? _____
4. Right-click the Account header (Column 1) and choose **Filter > Hide rows with zeros and no data**. What happens to the form? _____
5. What has been budgeted for **Total Classified Salaries**? _____
6. To export to Excel, go to **Tools > Export** as spreadsheet. What are the pros and cons of this Excel spreadsheet?

7. To remove the filter, choose **Filter > Show rows with zeros and no data**.

My Task List

Activity 4: Expense Budget Drill Down

1. Navigate to **Prepare & Review Budgets > Manage Budget Line Items**. Click the **Expense Budget Drill Down** form. Use this form to view all of the values for each ChartField. This is useful, for example, when you know a Resource but don't know the Goal or Function.
2. Enter S548 in the POV and click the Go arrow.
 - What amount do you see for FY18? _____
 - What amount do you see for FY19? _____
 - Why are these values different? _____
3. Collapse the pane.
4. Expand **ALL_HYP_FUNDS** to see the Funds.
5. Right-click the **General Fund**. Select **1-Select Object and Drill to Fund and Resource**.
 - For Fund 0100, how many resources are there? _____
 - Which one has money? _____

6. Right-click the Donations Resource and select **2-Goal Drill Down**. Which goal(s) are listed?

7. Right-click the Goal and select **3-Function Drill Down**. How many Functions (“U”) are listed?

8. Right-click the Function and select **4-Operating Unit Drill Down**. How many Operating Units (“L”) are listed? _____
9. Right-click L-Blank and select **5-ViewEdit Exp Budget Objects**. What information is now displayed on the screen? _____
10. What is the total for the **Books & Supplies** budget? _____
11. What is the **Total Expenditure** budget (TOTAL_ALL_EXPENDITUR)? _____

Activity 5: View Edit Expense Budgets By Version form

1. Navigate to **Prepare & Review Budgets > Manage Budget Line Items**. Click the **View Edit Expense Budgets By Version** form. If you know the complete ChartString that contains a budget, you can come directly to this screen and enter it in the POV.
2. Verify that the ChartString is already entered in the POV at the top of the screen. It retained it from the last form. Is it? (Y/N) _____
3. Verify that the **Books & Supplies** budget and **Total Expenditure** budgets match what you saw in Activity 4. Do they? (Y/N) _____
4. Let’s make 3 changes to the ChartString. Enter **Goal = G0000**, **Function = U7200**, and **Resource = R0000000** in the POV and click the Go arrow.
5. Now what is the **Total Expenditure** budget (TOTAL_ALL_EXPENDITUR)? _____

Activity 6: Maintain Position Data form

1. Navigate to **Prepare & Review Budgets > Manage Position and Employee Data**. Click the **Maintain Position Data** form. Enter S110 Parkway Middle in the POV and click the Go arrow.
2. Collapse the pane.
3. Find **P_10201157**.
 - Position Name? _____
 - Filled or Vacant? _____
 - Which employee is tied to this position? _____
 - What is the Position FTE? _____ Weekly Hours? _____
4. Change the POV to Fletcher Hills Elementary.
 - What position # is the Principal? _____
 - How many “Teacher” positions are there? (You might want to export to Excel as an option.) _____

Activity 7: Maintain Employees by Position form

1. Now open the **Maintain Employees by Position** form. Enter S110 in the POV and click the Go arrow.
2. Collapse the pane.
3. What do you notice that is different about this form compared to the last one from Activity 6?

4. Why does each position have a "Vacancy" line? _____

5. Find Position **P_10201083**.

- Which employee is in this position (Name/ID)? _____
- FTE? _____
- Total Compensation? _____
- Expand the **Total Compensation** column by clicking the + sign.
- Basic Salary Expense? _____ Earnings Expense? _____

6. From the **Employee** column (Column 2 in yellow), right-click on EM_605748 and choose **Edit Employee Details**. What do you see on this screen? _____

- Click the **Allocations** tab. You can see the ChartString for where the employee is being funded from. What is the Object? _____
- Does this employee have any additional earnings? (Y/N) _____
- If so, what is it? _____ Is it a flat or a percentage? _____
- Look in the **Override Option Value** column. What does the 3 represent? _____

7. At the top of the screen, click the **Manage Position-Employee Assignments** link to go back to the form.

BONUS QUESTION: Change the POV to Maintenance and Facilities.

- For the first employee EM_476567 what is their annual Earnings Expense? _____
- Now go to **Edit Employee Details**. Which additional earning does the employee have?

- How much per month? (Use the Override Option Value). _____
- Multiply the monthly amount by 12. Does it calculate to the annual amount? (Y/N)? _____