

PRESENTERS:
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HYP1: Introduction to Hyperion

Presented by SDCOE CRC | January 22, 2018



Agenda

MORNING

9:30-12:30

- Discussion/presentation of big picture, training plan, checklist, terminology, how to get started
- TOGETHER: Getting Started (follow along in training environment)
- **11:00-11:10 am: Break**
- TOGETHER: Navigation (training environment)
- TOGETHER: Viewing Data (training environment)

LUNCH

12:30-1:30

- 60-minute lunch break

AFTERNOON

1:30-4:00

- TOGETHER: Continue Viewing Data activities
- Coordinator Tasks
- Updating and Working with HCP Data
- Discuss HCM auditing prior to pulling extracts
- Discussion, recap, evaluation, dismissal



Objectives

BY THE END OF THE SESSION, YOU WILL BE ABLE TO:

- Describe the “big picture” of how Hyperion, HCM, and Finance tie together
- Understand the process you will follow, rules of thumb, terminology, and how Hyperion calculates
- Perform “the basics”:
 - Log in to Hyperion Production, change your password, set preferences, navigate
 - 1 person from your org needs to verify the fiscal year setup
- View data in Hyperion
 - Use 3 “M_” forms (positions, employees, expenses) to view data
 - Use 4 delivered forms from My Task List



Hyperion Training & Support

	M 1/22/18	M 1/29/18	M 2/5/18
AM 9:30 am - 12:30 pm	HYP1: Introduction to Hyperion (ALL DAY) <ul style="list-style-type: none"> Part I: Overview Part II: Getting Started View activities using training database 	HYP2: Manage Position and Employee Data (ALL DAY) <ul style="list-style-type: none"> Part VII: Maintain Position Data Part VIII: Maintain Employee By Position 	HYP3: Smart View 9:30 am -12:00 pm <ul style="list-style-type: none"> Part IX: Smart View (Excel Add-On)
PM 1:30-4:00 pm	<ul style="list-style-type: none"> View activities using training database (continued) View your own data Part III: Administrator & Coordinator Tasks Part IV: Updating and Working with HCP Data Handout to discuss HCM auditing prior to pulling extracts <p>Not covered in training: Part VI: Manage Budget Line Items (Non-Salary) – Review on your own as needed</p>	<ul style="list-style-type: none"> Part VIII: Maintain Employee By Position (continued) 	HYP4: HCM Extracts and Auditing Loaded Data 1:00-4:00 pm <ul style="list-style-type: none"> Part V: Working With Extracts (Excel) – Heavy Excel emphasis (Filters, text-to columns, vlookups, etc.)

- For Part X Audit Data Adopt Budget and Export to PeopleSoft Finance – watch videos when you are ready.
- 1:1 work sessions can be scheduled at SDCOE after February 5th through March 2018.
- To schedule a 1:1 work session, please contact Lori Free-Trout (lfreetrout@sdcoe.net). Provide 2-week lead time.



HYPERION BIG PICTURE

How PeopleSoft HCM, Finance, and Hyperion Fit Together

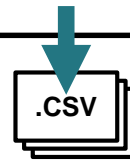
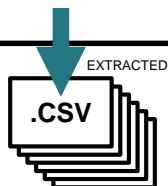
PeopleSoft HCM

- Contains HR data
 - Departments
 - Positions
 - Employees
 - Salary
 - MCOP
- Contains Benefits & Payroll data

PeopleSoft Finance

- Contains Finance data
 - General Ledger
 - Budget
 - ChartFields and ChartStrings

- Verify data accuracy
- Submit ticket to request extracts
- MITI creates and loads extracts
- Review your extracts and Hyperion



HCM Extracts (10)

- 01 - EMPLOYEES
- 02 - POSITIONDATA
- 03 - BudgetEMPLINFO
- 04 - BudgetPOSITIONINFO
- 05 - BudgetEMPLPOSINFO
- 06 - BudgetEMPLFTEINFO
- 07 - BudgetPOSFTEINFO
- 08 - BudgetEMPSALGRINFO
- 10 - BudgetEMPCOMPINFO
- 14 - BudgetEMPALLOCINFO

EDIT DATA IN EXCEL (SMART VIEW)



Hyperion

- Contains data from extracts (HCM, Finance)
- Complete your budget planning in Hyperion (budget-related items only)
 - Manage Budget Line Items (Non-Salary)
 - Maintain Position Data
 - Maintain Employee By Position
- Audit data, export to Finance

HCP = Human Capital Planning
Plan 1 = Finance

Finance Extracts (8)

1. 2018_Hyperion
This Finance extract contains Actuals, KK_EXP_BUD, KK_REV_BUD. Note that Actuals are not loaded into Hyperion.
2. FUND
3. RESOURCE
4. GOAL
5. FUNCTION
6. OBJ
7. ENT (Site)
8. OPERUNIT

EXPORT TO FINANCE

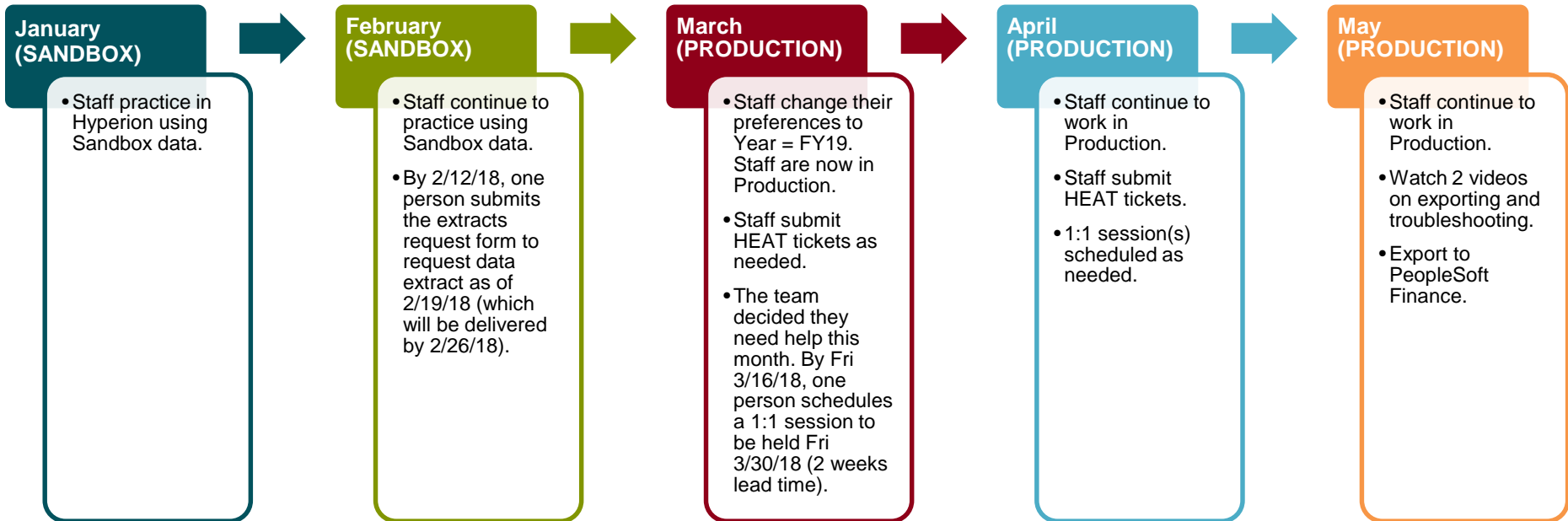


EXAMPLE ONLY!

Your district will follow its own schedule.

Month-by-Month Example

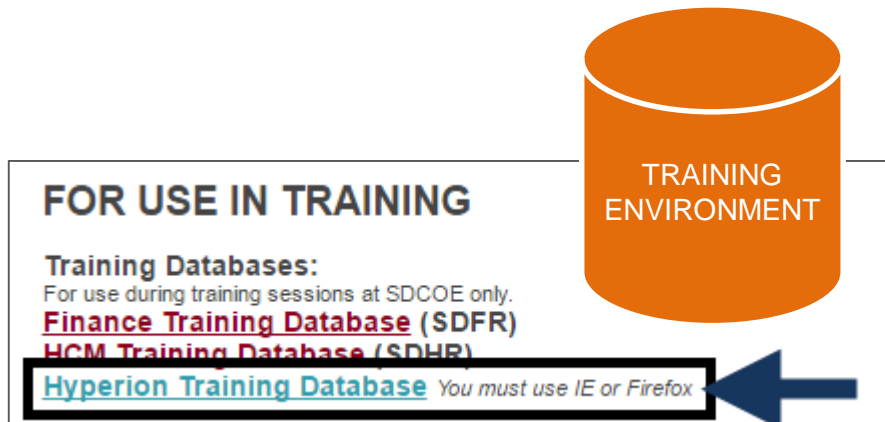
Scenario: A district wants to start using Hyperion in March with data as of 2/19/18. Their goal is to use Hyperion in March, April, and May and be done by the end of May.



Hyperion Environments

TRAINING ENVIRONMENT

- Accessed from CRC Links page
<http://crc.sdcoe.net/links>
- This environment is loaded with scrambled data from District 20
- Use only during training at SDCOE
- Log in as HYP001 - HYP040
- Pick "DST165"



PRODUCTION ENVIRONMENT

- Accessed from PeopleSoft Portal
<https://peoplesoft.erp.sdcoe.net>
- This environment is first loaded with Sandbox data. When you are ready, it will then be loaded with your Production data.
- Log in with your User ID (Employee ID) and Hyperion password
- Pick "DSTXXX" where XXX is your district #



Hyperion Checklist

Task	District	MITI	CRC
ONGOING			
Configure and prepare Hyperion.		•	
Create extracts for districts.		•	
Set up users and roles.			•
Create documentation.			•
Conduct training and 1:1 work sessions.			•
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.	•		
BEFORE PRODUCTION IS PREPARED			
<input type="checkbox"/> 1. Make sure HCM is correct. Check your Departments, Department Budget Table (DBT), Positions, and Employee data carefully.	•		
<input type="checkbox"/> 2. Create a HEAT ticket and attach the Extracts Request Form to request that your extracts are 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).	•		
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"> ▪ 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 session(s), if desired.	•		
<input type="checkbox"/> 9. Audit data.	•		
<input type="checkbox"/> 10. Export to PeopleSoft Finance.	•		



Rules of Thumb

It is recommended that you use Internet Explorer.

You will have a Hyperion login that is different from your PeopleSoft login.

In order to access Hyperion, you need to be set up as a user with roles.

Be sure to validate your data in HCM prior to requesting your extracts be loaded into Hyperion .

In Hyperion, the “Site” comes from your Department in HCM.

Be aware of the 45-minute timeout.

Don't share your password.



Hyperion Terminology

Annual Salary Spread: Number of pays. Expenses are equally spread across periods based on the employee's # of pays.

- Average = 12 pay
- Custom = 11 pay
- Ten_Months = 10 pay
- Nine_Months = 9 pay

BargUnit (Dimension): Same as Union Code. This is Empl Class (Certificated, Classified).

Business Rules: Similar to the Build process in BPS; this is comprised of Calculate, Allocate, Push, Aggregate

Chartfields

- **Fund (F):** Fund_List (Smart List)
- **Resource (R):** Project_List (Smart List)
- **Goal (G):** Goal_List (Smart List)
- **Function (U):** Program_List (Smart List)
- **Object:** Account (Dimension); Salary_Account_List (Smart List). Only includes Salary objects.
- **Site (S):** Entity (Dimension); Entity_List (Smart List)
- **Operating Unit (L):** Oper_Unit (Smart List)
- **Project Year (PY):** PY_List (Smart List)

Element (Dimension): Compensation type such as salary, additional earnings, benefits and employer-paid taxes.

Exception Hourly: Exception Hourly Employees work consistent weekly schedules and are not required to fill out a timesheet. They require work schedules. Legacy Term is "Fixed Schedule." Example: Instructional Aide working every Tuesday and Thursday for 5 hours.



Hyperion Terminology

Forms - Customized: These are in the Forms bar. These begin with M_ and were created specifically for districts and charter schools

Forms - Delivered: These are in the My Task List bar. These are the forms that come with the system.

HCM: Human Capital Management (PeopleSoft)

HCP: Human Capital Planning (Hyperion)

Option Value versus Override Option Value: You will use the Override Option Value field when changing data for salaries, additional pays, and other values (not the Option Value).

Period: Segments of time, such as quarters (Q1, Q2, Q3, Q4) or months (July, August, September for Q1). Includes BegBalance. Hyperion calculates on a monthly basis (not annual).

Plan 1: Finance data

POV (Point-of-View): The Site and ChartString values used on the forms

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

Smart View: An Excel add-in that interfaces with Hyperion. Use Smart View to do your analysis, make changes to data, and write back to Hyperion.

User Variable Options: A user-level setting (preference) to enter your Scenario (*Budget*), Version (*Working*), Year (like *FY18*), and Version (*NoStep*).

Zero-level member: Bottom level of a hierarchy tree, such as object code 1100000, or January for time period.



How Hyperion Calculates

Expense

Entity: S110 Parkway Middle		Position: P_10201083 Psychologist			Employee: EM_604617 Nxuszgfhcsdz-Mhmzkewsrixvzgf				
Current Year of View: FY18									
	YearTotal	Jul	Aug	Sep	Q1	Oct	Nov	Dec	Q2
Basic Salary Expense	52814.00	0	4801.27	4801.27	9602.55	4801.27	4801.27	4801.27	14403.82
Earnings Expense	1584.42		144.04	144.04	288.08	144.04	144.04	144.04	432.11
Benefits Expense	18427.60	743.23	1607.67	1607.67	3958.57	1607.67	1607.67	1607.67	4823.01
Total Taxes	3508.70		318.97	318.97	637.95	318.97	318.97	318.97	956.92
Total Compensation Expense	76334.72	743.23	6871.95	6871.95	14487.14	6871.95	6871.95	6871.95	20615.86
Gross Earnings	54398.42	0	4945.31	4945.31	9890.62	4945.31	4945.31	4945.31	14835.93
Taxable Compensation	54398.42	0	4945.31	4945.31	9890.62	4945.31	4945.31	4945.31	14835.93

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 07/01/2018	12 months	July		
8/1/2018	11 months		August	
9/1/2018	10 months			September
	YearTotal	101,000.04	101,000.02	101,000.00



Getting Started

How to log in, verify fiscal year, set up your preferences, change your password, and navigate within Hyperion.



Logging In to Hyperion Training

FOR USE IN TRAINING

Training Databases:

For use during training sessions at SDCOE only.

[Finance Training Database \(SDFR\)](#)

[HCM Training Database \(SDHR\)](#)

[Hyperion Training Database](#) *You must use IE or Firefox*



Oracle Enterprise Performance Management System Workspace, Fusion Edition

Log On

User Name:
HYP040

Password:
.....

Log On

ORACLE
ENTERPRISE PERFORMANCE
MANAGEMENT SYSTEM

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REMEMBER:

- Use Internet Explorer.
- Go to CRC Links page.
- Use the “HYP” information on your login slip (like HYP040, for example).
- Every HYP user is set up with all roles for DST165 (populated with District 20 data).



Screen Layout

Menu Bar 4

Tool Bar 3

1 View Pane

2 Content Pane

Task List Status

Task - Maintain position data Task Instructions

Current Scenario: Budget Current Stage: Working

S000 : S000 District Wide

	Position Number	Position Name	Position Type	No Year	Job
P_10171203:P_10171203 Superintendent	10171203	Superintende nt	Single Incumbent	J_17040	Superintendent
P_10171226:P_10171226 School & Categorical Coord.	10171226	School & Categorical	Single Incumbent	J_13031	Coordinator-Certificated Manag
P_10171629:P_10171629 Psychologist	10171629	Psychologist	Single Incumbent	J_15090	Psychologist
P_10171631:P_10171631 Psychologist	10171631	Psychologist	Single Incumbent	J_15090	Psychologist
P_10175007:P_10175007 Maintenance & Operations Supv	10175007	Maintenance &	Single Incumbent	J_22556	Maintenance & Operations Super
P_10175215:P_10175215 Administrative Assistant	10175215	Administrativ e Assistant	Single Incumbent	J_23062	Administrative Assistant-Class

REMEMBER:

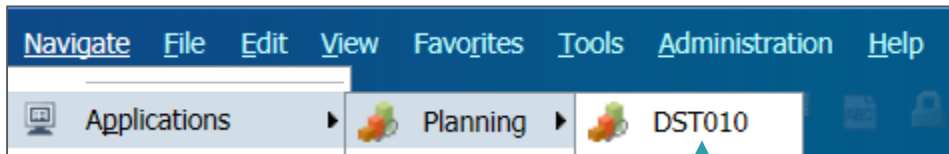
1 - View Pane = This is where you go to navigate

2 - Content Pane = This is where you view and edit data



Navigating to Your Application (District)

Navigate > Applications > Planning



Click on your **Application** (District #, like *DST010*).

The next time you log in, you will be taken to the selected application.



Verifying Fiscal Year Setup (Districtwide Setting)

DO NOT MAKE CHANGES ON THIS SCREEN.

Only one employee from your organization needs to verify the values on this screen for all users who access Hyperion.

For 2019 Budget Year

If FY18 is the current year...

PY2 Prior Year 2 = FY16

PY1 Prior Year 1 = FY17

CY Current Year = FY18

BY Budget Year = FY19

BY1 Subsequent Year 1 = FY20

BY2 Subsequent Year 2 = FY21

Variables			
User Variables		Substitution Variables	
Action	View	Detach	
Application	Plan Type	Name	Value
DST010	All Plan Types	CurrScenario	Budget
DST010	All Plan Types	PriorScenario	Budget
DST010	All Plan Types	PreviousStage	Working
DST010	All Plan Types	CurrentStage	Working
DST010	All Plan Types	CurrentYear	FY18
DST010	All Plan Types	ProposedYear	FY19
DST010	All Plan Types	PreviousYear	FY17
DST010	All Plan Types	Compensation_Budget_Start_Year	FY19
DST010	All Plan Types	Compensation_Budget_End_Year	FY19
DST010	All Plan Types	PY2	FY16
DST010	All Plan Types	PY1	FY17
DST010	All Plan Types	CY	FY18
DST010	All Plan Types	BY	FY19
DST010	All Plan Types	BY1	FY20
DST010	All Plan Types	BY2	FY21
DST010	All Plan Types	Working	Budget



Setting Up Your Preferences

Each Hyperion user needs to complete this setup.

USER VARIABLE OPTIONS (p.20)

Application Settings	Display Options	Printing Options	User Variable Options
Dimension	User Variable Name	Selected Member	
Version	CompareVersion	NOSTEP	
Scenario	Current Scenario	Budget	
Version	Current Stage	Working	
Year	Current Year of Vi...	FY19	

MEMBER NAME: ALIAS DISPLAY (p.26)

Alias Setting Use Application Default

Alias Table Default

Member Name/Alias Display Default

Approvals Options

Show Planning Units as Aliases Member Name

Show Planning Units That are Not Started Alias

Member Name:Alias

Alias:Member Name

COMMAS (IF DESIRED) (p.28)

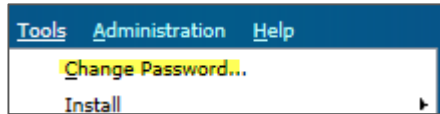
Number Formatting Use Application Default

Thousands Separator Comma



Changing Your Password

Tools > Change Password



Guidelines for creating a secure password/passphrase:

- At least 7 characters.
- Contains the following: an uppercase letter, lowercase letter, numeral, and a special character (%,!,&).

FORGOT YOUR HYPERION PASSWORD? To have your password reset, please create a HEAT ticket at <http://hss.sdcoe.net>. Only the CRC can reset forgotten Hyperion passwords.



Now we will log into the Training environment.

Please turn to p.16 of your guide.

Together we will:

1. Open IE and log in from the CRC website
2. Verify fiscal year setup (already set)
3. Enter user preferences: User variables options, member alias, commas
4. See where to change password (don't change in training)
5. See where to log out



ACTIVITIES: Viewing Data

Together we will use 3 “M_” forms (Forms) and 4 delivered forms (My Task List) to practice viewing data in Hyperion.



Let's look at Forms and My Task List in the Training environment.

Please turn to p.33 of your guide.

Together we will:

1. Look at “M_” forms (FORMS)
2. Look at delivered forms (MY TASK LIST)
3. See how to collapse the pane
4. Activities



ACTIVITIES: Viewing Data

These are the navigations we will use:

Forms:

- LEA > HCP Data View
([M_All PositionCompBySite](#))
- LEA > HCP Data View
([M_EMPINFO](#))
- LEA > PLAN1 Data Forms
([M_Expense_04](#))

My Task List:

- Prepare & Review Budgets > Manage Budget Line Items
([Expense Budget Drill Down](#) form)
- Prepare & Review Budgets > Manage Budget Line Items
([View Edit Expense Budgets By Version](#) form)
- Prepare & Review Budgets > Manage Position and Employee Data
([Maintain Position Data](#) form)
- Prepare & Review Budgets > Manage Position and Employee Data
([Maintain Employees by Position](#) form)



Coordinator Tasks

HCM Data Audit, Adding Dimension Elements, Run Business Rules, Requesting 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



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HCM Extracts Content and Audit Guidelines

Version 1.0 | February 16, 2017

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 v1.0 | 1

- The HCM Extracts versus Hyperion Audit Guidelines v1.0 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.



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CUSTOMER RESOURCE CENTER

How to Request Extracts and Data Load

Directions:

1. Identify the date that you want the extracts to be created (at least 1 week).
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.

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	
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		

Only one person needs to complete the form.

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



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 2/12/18

Date that HEAT ticket is submitted with request form attached

Mon 2/19/18

Date that extracts should be pulled

Mon 2/26/18 (2 weeks from HEAT ticket)

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



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

A: If you find errors because your HCM data were 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.



Running Business Rules

IMPORTANT NOTES

- All 4 business rules should be run prior to Data Export.
- When running the business rules, it is important to let the process run to completion. **Interrupting or canceling the process may cause the application to lock up.** Run the Business Rules in the order below and check the Job Console to verify each job ran to success and has no errors before running the next business rule.

Make sure all users are logged out of the system before running business rules

Business Rules Order of Operations



Adding a Dimension Element

- Used for adding new information to Hyperion that is not already loaded from the extracts.
- Examples of Elements:
 - Brand new chartfield, such as Resource (Project) or Object/Sub-Object
 - Union Code
 - Additional Earning
 - Benefit or Tax
- **Important:** If the new Dimension Member that you are adding will be used in any Salary, Additional Earning, Benefit or Tax calculations, you must also add them to the Smart Lists **(p.72)**
 - Refresh the database **(p.52)**, then Map Reporting Refresh **(p.53)**



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

- **Available:**
 - How to use Sandbox data
 - Employee History Report
- **Under Development:**
 - Auditing Your Data & Exporting to PS Finance
 - Troubleshooting

1:1 Work Sessions

- Optional – as needed. These are in lieu of open labs.
- Schedule and attend 1:1 face-to-face or remote 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

EMAIL 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/18 *(Please provide 2-week lead time. Specify AM or PM.)*
 - Second choice date/time: X/X/18 *(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.



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 guide, forms, templates are at <http://crc.sdcoe.net/resources/peoplesoft/guides>**
 - Newest Hyperion Guide will be published 12/11/17
 - [Hyperion Extracts Request Form v3.0.pdf](#) (Form – download for “fillable” fields)
 - [HCM Extracts versus Hyperion Audit Guidelines v1.0](#) (Job Aid)
 - [Employee History Report Template 10000 Lines - UNPROTECTED v1.0.xlsx](#) (Excel Template)
 - [Pseudo Data Request Template Information v1.0.xlsx](#) (Excel Template)
 - [Hyperion Role Assignment Request Form v1.0.xlsx](#) (Excel form)
- **Hyperion videos are at <http://crc.sdcoe.net/resources/peoplesoft/tutorials>**
 - [How to Use Sandbox Data](#) (5:41)
 - [How to Enter Data Onto the Employee History Report Template](#) (7:22)
 - Additional video tutorials will be created
- **Hyperion announcements are at <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>



On Your Own, Back at Work...

Directions: ON YOUR OWN – Repeat all of today’s activities in your Production environment (loaded with Sandbox data).

To Do:

1. Log in to Production (p.16)
2. Verify fiscal year setup (p.19)
3. Set up your user preferences (p.20)
4. Change your password (p.29)
5. Replicate the 7 activities but *use your own data* (find positions/employees of your choice, use Sites and ChartStrings of your choice, etc.)



Q & A

Before we go to the course evaluation, what kinds of questions can we answer?

COURSE EVALUATION

Please go to the Links page on the CRC website. Scroll all the way to the bottom and click on Peri the Muppet.

