
  
**HYP1: Manage Position and Employee Data**
  
 Presented by SDCOE CRC | January 29, 2019
   
 PRESENTERS:
   
 Kay Pugh
   
 Kim Harrison

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**Objectives**
  
 By the end of the session, you will be able to perform several common tasks.

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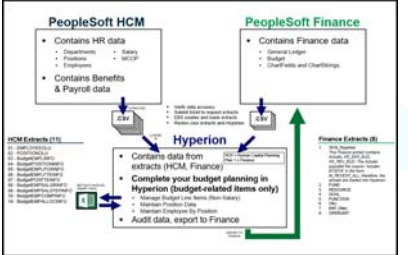
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**The Big Picture**



HCM Extracts (17)
   
 Finance Extracts (8)

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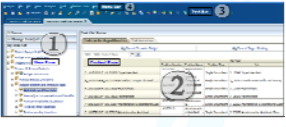
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## Navigating in Hyperion



**1 View Pane**

**2 Content Pane**

**3 Tool Bar**

**4 Menu Bar**

The View Pane is on the left side of the screen. This is how you navigate. It is organized by 6 bars: Forms, Manage Task Lists, My Task List, Dimension, Business Rule Security, and Preferences. You will use Forms and My Task List extensively. You can collapse the View Pane.

The Content Pane shows you the results of items chosen from the View Pane (like: opening your Task List and allows you to define your point of View (POV) between sites, for example) for viewing and entering data. This is where you view and add data.

**Forms:** Opens a new window at the time page.  
**Export:** Takes you to the report repository.  
**Save:** Saves data entered.  
**Refresh:** Refreshes the database.  
**Stop:** Allows you to end the page.  
**Lock/Unlock Code:** Allows you to lock/unlock the code.

**Annotations:** Allows you to add annotations.  
**Get, Copy & Paste:** For entering data.  
**Clear & Refresh:** Clears the current content pane to enter data, including analysis and Ad Hoc options - As of December 2015, do not use this with an alternate method.  
**Refresh:** Refreshes your session.  
**Print:** Prints to PDF, print to your printer, copy version, merge reports and user business rules.  
**Administration:** Manage forms and email (optional).  
**Help:** To see help topics for various components of Hyperion.

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## User Preferences

- You will need to set up user preferences for the new year.
- **Navigation: File > Preferences > Planning**
  - User Variable Options tab
- Year is FY20 for the budget year 2019-20.

Application Settings	Display Options	Printing Options	User Variable Options
Dimension	User Variable Name	Selected Member	
Version	Compare/Version	NOSTEP	
Scenario	Current Scenario	Budget	
Version	Current Stage	Working	
Year	Current Year of VL	FY20	

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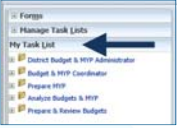
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## My Task List

- **Maintain Position Data (p.101)**
  1. Add a Position
  2. Assign a To-Be-Hired Employee
- **Maintain Employee By Position (p.108)**
  1. Add Employee Details
  2. Change the funding source
  3. Split-fund a position
  4. Add an additional earning (MCOP or Additional Pay)
  5. Change Benefits
  6. Change annual salary



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### Three Methods of Manipulating Data

	Method	Use
1	<b>My Task List</b> <i>"Delivered forms"</i>	<ul style="list-style-type: none"> <li>• Best for seeing the overall status of the sites and incumbent/position detail</li> <li>• Best for quick changes</li> <li>• Best for updating an employee</li> <li>• Most common tasks can be accomplished using My Task List</li> </ul>
2	<b>Forms</b> <i>"Custom forms" that begin with M_</i>	<ul style="list-style-type: none"> <li>• Forms are mostly used in conjunction with Smart View when manipulating data, however you can edit/update information from M_ forms</li> </ul>
3	<b>Smart View</b> <i>This is an Excel add-in that interfaces with Hyperion</i>	<ul style="list-style-type: none"> <li>• Best for changes to many employees</li> <li>• Use Smart View when you want to take advantage of Excel features (sort, filter, etc.)</li> </ul>

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### Incumbent Line vs Vacancy Line

**REMINDER:**  
Hyperion is employee-driven, not position-driven

- All of the detail information should be **on the Incumbent line**, not the Vacancy line
- Right-click Employee Name, Edit Employee Details
- Vacancy line will only have FTE
- For vacancies, assign a To-Be-Hired employee and budget on the Incumbent line (not the Vacancy line)

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### Maintain Position Data

Please turn to p.97 of your guide.

**Together we will:**

- Log into Hyperion for your district
  - Internet Explorer
- Review the Maintain Position Data
  - Complete the 2 common tasks
- Review the Maintain Employees by Position
  - Complete 6 common tasks

A diamond (◆) indicates a common task.

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### Other Tasks

- Manage Other Compensation Elements (p.40)
  - Forms menu, default values
  - My Task List, add options
- Run Business Rules (p.41)
- Add a Member to an Existing Smart List (p.65)

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### 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**

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  graph LR
    A[Calculate] --> B[Allocate]
    B --> C[Push]
    C --> D[Aggregate]
  
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### 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.65)
  - Refresh the database (p.50), then Map Reporting Refresh (p.51)

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**Support Tools**

<p><b>HEAT</b></p> <ul style="list-style-type: none"> <li>Submit a ticket for:             <ul style="list-style-type: none"> <li>Questions</li> <li>Issues</li> <li>Guidance</li> <li>Requests (Extract Request Form, Pseudo template, for example)</li> </ul> </li> </ul>	<p><b>Guide</b></p> <ul style="list-style-type: none"> <li>Getting Started</li> <li>Admin &amp; Coordinator Tasks</li> <li>Updating and Working with HCP Data</li> <li>Working With Extracts (see the HCM Extracts Key)</li> <li>Data Entry in Hyperion</li> <li>Smart View</li> <li>Manage Budget Line Items (Non-Salary)</li> <li>Maintain Position Data (FTEs)</li> <li>Maintain Employees By Position</li> <li>Audit &amp; Export to PeopleSoft Finance</li> <li>Appendices (HCM Navigations)</li> </ul>	<p><b>Video Tutorials</b></p> <ul style="list-style-type: none"> <li>Employee History Report</li> <li>Hyperion Data Export to PeopleSoft Budget Import Template</li> </ul> <p><b>Job Aids</b></p> <ul style="list-style-type: none"> <li>Troubleshooting</li> <li>Administration Export Data – Budget Upload Template Instructions</li> <li>Exception Hourly Employees in HCM – Conversion to Hyperion</li> <li>HCM Extracts versus Hyperion Audit Guidelines</li> </ul>	<p><b>1:1 Work Sessions</b></p> <ul style="list-style-type: none"> <li>Optional – as needed. These are in lieu of open labs.</li> <li>Schedule and attend 1:1 face-to-face work sessions held at SDCOE.</li> <li>To schedule: Contact Lori Free-Trout (lfreetrout@sdcoe.net). Provide 2-week lead time.</li> </ul>
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**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.

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**How to Request Extracts and Data Load**

**Directions:**

- Identify the date that you want the extracts to be created (at least 1 week).
- Make sure HCM is correct. Check your Departments, Department Budget Table, Positions, and Employee data carefully.
- 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.

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## Time to Practice!

**Directions:** ON YOUR OWN – Repeat desired common tasks.

**To Try:**

<p><b>- Maintain Position Data</b></p> <ol style="list-style-type: none"> <li>1. Add a Position (p.105)</li> <li>2. Assign a To-Be-Hired Employee (p.107)</li> </ol>	<p><b>- Maintain Employee By Position</b></p> <ol style="list-style-type: none"> <li>1. Add Employee Details (p.116)</li> <li>2. Change the Funding Source (p.125)</li> <li>3. Split-fund a position (p.126)</li> <li>4. Add Additional Earnings (p.128)</li> <li>5. Change Benefits (p.129)</li> <li>6. Change Annual Salary (p.131)</li> </ol>
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## Summary of Links

- **Sites:**
  - PeopleSoft Portal to access Hyperion: <http://peoplesoft.erp.sdcoe.net>
  - HEAT Self-Service: <http://hs.sdcoe.net>
  - Secure File Transfer System (SFTS): <http://sfts.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 Into the Employee History Report Template (7:22)
  - Hyperion Data Export to PeopleSoft Budget Input Template (8:39)
- **Hyperion announcements:** <http://crc.sdcoe.net/announcements/hyperionnews>
  - HCM auditing prior to pulling extracts' announcement: <http://crc.sdcoe.net/announcements/hyperionnews/hcm-auditing-prior-to-pulling-extracts>
  - Employee History Report announcement: <http://crc.sdcoe.net/announcements/peoplesoft/news/hyperionemployeehistoryreport>

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## 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.



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