## **Miami-Dade County**



## **Department End User Training Guide**

**Course Code: HYP.DEP.PS** 

Course Title: Hyperion Department Personnel End User Training Guide

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	Course Overview
Course Description	This course provides a comprehensive review of the Hyperion Personnel planning processes.
	This course consists of the following modules:
	Module 1: Course Introduction
	Module 2: Big Picture Items
	Module 3: Hyperion Basics
	Module 4: Position and Employee Forms
	Module 5: Position and Employee Modifications
	Module 6: Personnel Buckets
	Module 7: Review Personnel
	Module 8: Running Position Reports
	Module 9: Personnel Current Year Forecast
	Module 10: Course Summary
Training Audiences	The following audience(s), by Hyperion Security role(s), are required to complete this course prior to being granted related system access:
	Department Users with both Personnel and Financials access
	Department Users with only Personnel access
Delivery Method	• This course is intended to be delivered through Instructor-led Training.
Estimated Duration	The total duration of this course, when delivered through Instructor-led Training, is 6 hours.

Course Outline	
Content	06:00
Module 1: Course Introduction	00:15
Module 2: Big Picture Items	00:30
Topic 1: Application architecture	
<ul> <li>Topic 2: Nightly position and employee refresh from HCM</li> </ul>	
Topic 3: Attrition and personnel buckets	
<ul> <li>Topic 4: Data map and rounding schedule</li> </ul>	
Module 3: Hyperion Basics	00:30
<ul> <li>Lesson 1: Logging into the application</li> </ul>	
Lesson 2: Hyperion Account Set Up	
<ul> <li>Lesson 3: Using member selectors</li> </ul>	
<ul> <li>Lesson 4: Using data form point of views (POVs)</li> </ul>	
<ul> <li>Lesson 5: Saving data to a data form</li> </ul>	
Module 4: Position and Employee Forms	00:30
<ul> <li>Lesson 1: Manage Employees by Department</li> </ul>	
<ul> <li>Lesson 2: Manage Positions by Department</li> </ul>	
<ul> <li>Lesson 3: Manage Single Employee</li> </ul>	
<ul> <li>Lesson 4: Manage Single Position</li> </ul>	
Lesson 5: Personnel Details	
Module 5: Position and Employee Modifications	02:00
<ul> <li>Lesson 1: Change Position from Full Time to Part Time</li> </ul>	
Lesson 2: Change Part Time FTE	
<ul> <li>Lesson 3: Change Position from Part Time to Full Time</li> </ul>	
<ul> <li>Lesson 4: Change Position Max Headcount</li> </ul>	
Lesson 5: Move Position	
Lesson 6: Sync Position with HCM	
Lesson 7: Inactivate / Reactivate Position	
<ul> <li>Lesson 8: Add / Delete New Position</li> </ul>	
Lesson 9: Terminate / Reactivate Employee	
Lesson 10: Update Accrued Balances	
<ul> <li>Lesson 11: Transfer Employee / Undo Employee Transfer</li> </ul>	
<ul> <li>Lesson 12: Change Salary – Step</li> </ul>	
<ul> <li>Lesson 13: Change Salary – Range</li> </ul>	
Lesson 14: Add / Delete Pay Component	
<ul> <li>Lesson 15: Add / Delete Executive Benefits</li> </ul>	



Lesson 16: Update Retirement	
Lesson 17: Update Allocation	
Lesson 18: Set Attrition Rates	
<ul> <li>Lesson 19: Manage Department Allocation Defaults</li> </ul>	
<ul> <li>Lesson 20: View HCM Refresh Flag</li> </ul>	
Module 6: Personnel Buckets	0:40
<ul> <li>Lesson 1: Manage Overtime Buckets</li> </ul>	
<ul> <li>Lesson 2: Manage Seasonal and Temp Buckets</li> </ul>	
Lesson 3: Manage FTE Buckets	
Module 7: Review Personnel	0:25
Lesson 1: Review All Personnel Records	
<ul> <li>Lesson 2: Attrition Budget Impact Review</li> </ul>	
Lesson 3: PSTN Driven Account Review	
Module 8: Running Position Reports	0:45
<ul> <li>Lesson 1: BAT Annual Position Report</li> </ul>	
<ul> <li>Lesson 2: BAT Department Summary</li> </ul>	
<ul> <li>Lesson 3: BAT Employee by Position Report</li> </ul>	
<ul> <li>Lesson 4: BAT Employee by Position with Union Code</li> </ul>	
<ul> <li>Lesson 5: BAT Employee Position (Full Time) Variance Report</li> </ul>	
<ul> <li>Lesson 6: BAT Employee Position (Part Time) Variance Report</li> </ul>	
<ul> <li>Lesson 7: BAT Fringe Expense by Employee Report</li> </ul>	
<ul> <li>Lesson 8: BAT FTE and Compensation Total by Department</li> </ul>	
<ul> <li>Lesson 9: BAT PSTN vs. OP Plan Compensation Reconciliation Report</li> </ul>	
<ul> <li>Lesson 10: BAT Position Summary Report</li> </ul>	
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<ul> <li>Lesson 12: BAT Employee Position by Project and Activity</li> </ul>	
<ul> <li>Lesson 13: BAT Personnel Overrides</li> </ul>	
<ul> <li>Lesson 14: BAT Attrition Impact Report - Detail</li> </ul>	
<ul> <li>Lesson 15: BAT Attrition Impact Report - Summary</li> </ul>	
Module 9: Personnel Current Year Forecast	0:15
<ul> <li>Lesson 1: View Current Year Forecast</li> </ul>	
Module 10: Course Summary	0:10

Total Duration 06:00



## Module 1: Course Introduction Topics This module covers the following topics:

- Course Administrative and Logistical Matters
- Course Learning Objectives

	Module 1: Course Introduction
Course Administration	To receive credit for completing this course, which is necessary to be granted system access for performing related tasks in Hyperion, participants must:
and Logistics	Stay logged into the Training Teams session
	To get the most benefit from this course, participants should:
	Activaly participate in the training and ack questions as peeded

- Actively participate in the training, and ask questions as needed
- Please keep your computer microphone on mute unless speaking
- There will be breaks throughout the training

	Module 1: Course Introduction
Learning	At the conclusion of this course, participants will be able to:
Objectives	<ul> <li>Understand big picture concepts related to the Hyperion personnel model</li> </ul>
	Understand Hyperion end user functionality basics
	<ul> <li>Navigate to and become familiar with position and employee forms</li> </ul>
	<ul> <li>Make modifications to positions and employees</li> </ul>
	<ul> <li>Manage, create, and delete personnel buckets</li> </ul>
	• Review all personnel records, attrition budget impact, and PSTN driven accounts
	Run all position reports
	<ul> <li>View the results of the current year personnel forecast</li> </ul>



# Module 2: Big Picture Items Overview This module includes the following topics: • Topic 1: Application architecture • Topic 2: Nightly position and employee refresh from HCM

- Topic 2: Nightly position and employee renes
   Topic 3: Attrition and personnel buckets
- Topic 4: Data map and rounding schedule

#### **Topic 1: Application Architecture**

The Hyperion application, MDCBUD, is made up of three "cubes" (databases):

- 1. PSTN: The position cube (PSTN) is used for position, employee, personnel bucket and attrition planning. Detailed data from PSTN is mapped into FINSTMT and PSTN\_RPT on a scheduled basis
- 2. FINSTMT: The financials cube (FINSTMT) is used for chart of accounts level planning. Data is entered into FINSTMT at the combination of Account, Department, Fund, Grant, Project and Activity (and Revenue Description for revenue data). FINSTMT is also used for aggregate view financial reporting. Detailed data from PSTN is mapped into FINSTMT on a scheduled basis.
- 3. PSTN\_RPT: The position reporting cube (PSTN\_RPT) is used to report and analyze position and employee data at the chart of accounts level. For example, users would use this cube to report on COLA impact by fund or pay exception data by department.



Inbound Integrations:

- 1. PeopleSoft Financials 9.2: Miami Dade chart of account values along with Actuals and Current Budget data is loaded into Hyperion on a nightly basis
- 2. PeopleSoft HR 9.1 / EDW: Position and employee data is loaded into Hyperion on a nightly basis. This data is then copied into the budget on a nightly basis until OMB turns the feed off
- 3. WASD / Aviation: WASD and Aviation chartfield values and Actuals data is loaded into Hyperion on an ad hoc basis

**Outbound Integrations:** 

- 1. PeopleSoft Financials 9.2: The Adopted Budget is loaded back into PeopleSoft Financials
- 2. RFRO: Hyperion will interface with RFRO and source budget, current year forecast and actuals data on a regular basis
- 3. WASD / Aviation: The Adopted Budget for WASD and Aviation is sent back to WASD and Aviation

#### **Topic 2: Nightly Position and Employee Refresh from HCM**

Position and employee data is loaded into Hyperion from PeopleSoft HR 9.1 and EDW on a nightly basis. This data is "refreshed" in the budget on a nightly basis until OMB turns the feed off.

What this now means for users:

- 1. If you notice an issue with a position or employee in Hyperion, fix the issue in HR and the corrected data will be loaded into Hyperion the following night
- 2. You no longer need to try to keep Hyperion in sync with HR. As positions and employees change in HR, the updates will be loaded into Hyperion on a nightly basis.
- 3. Once you make a change to a position or employee in Hyperion, the entire position is excluded from the nightly HCM refresh, unless the position is re-synchronized with HR (refer to the Sync with HCM position change rule)

The following **employee** attributes are part of the nightly HCM refresh:

- 1. Employee Name
- 2. Pay Anniversary Date
- 3. Longevity Date
- 4. Longevity Years
- 5. Biweekly Salary Amount
- 6. Step (if applicable)
- 7. Assigned Pay Exceptions
- 8. Assigned Retirement Code
- 9. Assigned Executive Benefit Code (if applicable)

The following **position** attributes are part of the nightly HCM refresh:

- 1. Position Description
- 2. Full Time / Part Time
- 3. FTE
- 4. Job Code
- 5. Salary Grade
- 6. Union
- 7. Headcount
- 8. Standard Hours
- 9. Standard FTE
- 10. Max Headcount

If a user makes ANY type of change to a position or employee in Hyperion (transfer an employee, terminate the employee, add a pay exception to an employee, change the allocation assigned to a position or employee, change the max headcount on a position, etc.), the entire position is excluded from the HCM refresh. This allows users to make budget year specific changes to personnel that will not be reflected in the HR data, and then not have the HR feed wipe out those changes.



If a position has been excluded from the nightly HCM refresh, the EMPVacancy member will be flagged with "Yes" in the Exclude from HCM Update column.

sk - Manage P	ositions by Depa	rtment Task Inst	ructions				
	Years:FY22			Scenario:Budg	👷 Requests:Ba		
FN06100100 -	CREDIT & COLLEC	✓ Working		•			
	Budget Amount	Exclude from HCM Update	Position Status	Transfer Month	Position Description	FT_PT	FTE
POS00003983	51,410	Yes	Active		CREDIT & COL FIN SECT MGR	Part Time	
POS00003986			Active		FINANCE COLLECTION SPECIALIST	Full Time	
POS00003987		Yes	Transferred	0ct	FINANCE COLLECTION SPECIALIST	Full Time	
POS00003988			Active		CREDIT & COLLECTIONS REP	Full Time	
POS00003989			Active		ACCOUNT CLERK	Full Time	

OMB also has the ability to exclude an entire department from the nightly HCM refresh. This will occur once departments are close to finalizing budgets or OMB no longer wants personnel budgets changing. Department users can check for this flag on the HCM Refresh Flag task. If the department is set to "Yes", then all positions and employees in the department are excluded from the nightly HCM refresh.

	Years EY22	Scenario:
	FN00000000 - FINANCE DEPART 💌 🍉	
<ul> <li>Personnel Management</li> <li>Panage Personnel</li> <li>Som Manage Employees by Department</li> </ul>	Exclude Department from Nightly HCM Update	
Source of the second seco	Yes	
<ul> <li>Manage Single Position</li> <li>Manage Overtime Buckets</li> </ul>		
Manage Seasonal and Temp Buckets		
Manage Department Allocation Defaults		

#### **Topic 3: Attrition and Personnel Buckets**

The following personnel components are now managed and calculated in the position cube (PSTN) and then mapped into the financials cube (FINSTMT) on a scheduled basis:

- 1. Overtime and associated fringes
- 2. Temp / Seasonal and associated fringes
- 3. Attrition

For detailed steps on how to enter and calculate budgets for these personnel components, refer to the **Set Attrition Rates** lesson in the **Position and Employee Modifications** module and the **Overtime Buckets** lesson and the **Seasonal and Temp Buckets** lesson in the **Personnel Buckets** module.

#### **Overtime Buckets**

- 1. The Overtime Type selection drives the retirement bucket assignment (Regular or Special Risk)
- 2. The Overtime Annual Amount will be allocated to the Overtime account (5001600000)
- 3. Taxes are applied to all overtime buckets

			(A)			A				
Scenario:Budget	Years:F	Y22	Requests:Base	Employee:EMPVacancy		Department User V	/ariable: FN00000000 - FINA	NCE DEPARTMENT		
Vorking 👻	•									
Departments in Row Department										
1									Other	
1		Overtime Annual							Compensation	🔺 Total
	Overtime Type	Amount	Allocated Fund	Allocated Grant	Allocated Project	Allocated Activity	Allocation Percent	Salary Amount	Amount	Compensati
		10.000	1001 - GENERAL FUND OPERATIONS	No Grant	No Project	No Activity	100%	10,000	1,634	11
FN01010000 - D Overtime Bucket	Regular Overtime Bucket	10,000								
Overtime Bucket 2	2	10,000								
Overtime Bucket 2	2	10,000								
	2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	10,000								

#### Temp and Seasonal Buckets

- 1. Users will enter the bucket type (Seasonal, Part Time Temp, Poll Worker), Headcount, Average Hourly Rate, and Hours / Month in the run time prompt, which will drive the bucket salary calculation
- 2. Taxes are applied to all temp / seasonal buckets
- 3. FTE is calculated based on the headcount and hours entered

Wears:	=Y22		<b></b> ,	Scenario:Budget	
FN01010000 - DIRECTOR'S ADMIN	▼ Working	_	-		
	Budget Amount	Job Code	Position Description	Full Time / Part Time	
Seasonal and Temporary Bucket 1	96,885	easonal Bucket	Training Test	Temp / Seasonal	

unf@rms

Scen	nario:Budget			departm.	ent:FN010100	000 - DIRECTOR'S A	ADMIN		Version:Working Years:FY22				Desition:Seasonal and			
Req	uests:Base				Employee:	EMPVacancy										
Header Salary	Other Comper	Allocation	on Ca	lculated Compensation	Allocated 0	Compensation										
				Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	YearTotal		
Temp Seasonal Bi	ucket Salary Sa	alary Amount							20,000.00	20,000.00	20,000.00	20,000.00	10,000.00	90,000.00		
Current Year Sala	ary Si	alary Amount				Bas	ed on Hou	rs /	20,000.00	20,000.00	20,000.00	20,000.00	10,000.00	90,000.0		
Total Salary	Т	otal Compensation	1			Month	Haadaau	at and	20,000.00	20,000.00	20,000.00	20,000.00	10,000.00	90,000.0		
Social Security Ra	ate O	ther Compensatio	n Amoun	t		MOIL	, neaucou		1,240.00	1,240.00	1,240.00	1,240.00	620.00	5,580.00		
Medicare Rate	0	ther Compensatio	n Amoun	t			lourly Rate		290.00	290.00	290.00	290.00	145.00	1,305.0		
Total Other Comp	pensation Te	otal Compensation	1						1,530.00	1,530.00	1,530.00	1,530.00	765.00	6,885.0		
Total Pay Elemen	t Te	otal Compensation							21 530 00	21 530 00	21 530 00	21 530 00	10 765 00	96 885 0		

#### **Attrition**

- 1. Attrition rates are still set at the department, division and/or section level
- 2. Attrition is assigned and calculated on each position and employee and then mapped to FINSTMT, however users will not see attrition data at the employee and position level

In this example, each position and employee in Finance will be calculated with a 4% attrition except for positions and employees in the Controllers Division, which will be calculated with a 3% attrition.

My Task List	Task - Attrition Rates Task Instructions	
<ul> <li>Personnel Management</li> <li>Manage Personnel</li> <li>Manage Employees by Department</li> <li>Manage Positions by Department</li> </ul>	Image: SegBalance         Image: SegBalance	Years:FY22
<ul> <li>S<sup>®</sup> Manage Single Employee</li> <li>S<sup>®</sup> Manage Single Position</li> <li>S<sup>®</sup> Manage Overtime Buckets</li> <li>S<sup>®</sup> Manage Seasonal and Temp Buckets</li> <li>S<sup>®</sup> Attrition Rates</li> <li>S<sup>®</sup> HCM Refresh Flag</li> <li>S<sup>®</sup> Manage Department Allocation Defaults</li> <li>Review Personnel</li> <li>Operating Preparation</li> </ul>	<ul> <li>&gt; FN01000000 - DIRECTOR'S OFFICE</li> <li>&gt; FN02000000 - CONTROLLERS DIVISION</li> <li>&gt; FN03000000 - FIN BUSINESS SOLUTIONS SUPPORT FN04000000 - BOND ADMINISTRATION DIVISION</li> <li>&gt; FN05000000 - CASH MANAGEMENT DIVISION</li> <li>&gt; FN06000000 - TAX COLLECTOR'S DIVISION</li> <li>&gt; FN07000000 - FIN, COMPLIANCE &amp; ADMIN DIV</li> <li>&gt; FN0CP000000 - FINANCE CAPITAL</li> </ul>	
Expanded Requests	FN00000000 - FINANCE DEPARTMENT	0.04

#### **Topic 4: Data Map and Rounding Schedule**

During the budget cycle, data is mapped between PSTN and FINSTMT and then PSTN and PSTN\_RPT on an ongoing basis. In addition, the budget is rounded in FINSTMT into a rounded period member (YearTotal-Rounded) as part of the scheduled mapping. During these times, users might notice that data has been cleared from the target databases while the mapping are in process.

Each scheduled data map is expected to take approximately 10 minutes to complete. The noon mapping will include additional calculations.

The mid-day mappings will run at the following times:

- 1. 6:00 AM
- 2. 9:00 AM
- 3. 12:00 PM (additional calculations also happen at noon, which takes approximately 30 minutes to complete)
- 4. 3:00 PM
- 5. 6:00 PM
- 6. 9:00 PM



	Module 3: Hyperion Basics
Overview	This module includes the following lessons:
	<ul> <li>Lesson 1: Logging into the application</li> <li>Lesson 2: Hyperion Account Set Up</li> <li>Lesson 3: Using member selectors</li> <li>Lesson 4: Using data form point of views (POVs)</li> <li>Lesson 5: Saving data to a data form</li> </ul>



#### Module 3: Key Terms

The following key terms are used in this Module:

Point of View (POV)	A dimension selection that applies to an entire data form or report
Member Selector	Out of the box Hyperion functionality to select a dimension member to for a business rule, user variable or report



	Lesson 1: Logging into the Application
Lesson Overview	This lesson will guide users through the steps to log into the application.
In this lesson you will learn:	<ul> <li>Navigate to the portal</li> <li>Log into Hyperion with your user eKey and password</li> </ul>

Step	Action	Notes
1	From Google Chrome or Microsoft Edge, enter the following URL, <u>https://informsuat.miamidade.gov/.</u>	
2	You will then arrive at the Single Sign On landing page shown below:	Please note that
2	HOME A Q R :	the Single Sign
	Finance / Supply Chain (FSCM) Approvals Budget Scorecard	uses network
		credentials to log you into the system.
	Employee Self-Service Manager Self-Service Muman Resources (HCM) COMING SOON COMING SOON COMING SOON	,
	Analytics (OBIA) Control SOCH CONTROL SOCH CONTROL SOCH CONTROL SOCH CONTROL SOCH CONTROL SOCH	
3	This page will have tiles that will allow you log into all INFORMS systems that you currently have access to. You will then click on the Budget tile shown below:	
	номе	
	Finance / Supply Chain (FSCM)	
	Employee Self-Service Human Resources (HCM) Learning (ELM)	
4	After clicking on the tile shown above, INFORMS will automatically take you to the Hyperion home page shown below:	1
	Form add in Color Add in Col	



	Lesson 2: Hyperion Account Set Up		
Lesson	This lesson will guide users through the steps to set up their application settings, reporting		
Overview	settings, and user variable.		
In this	Set the application as your home page		
lesson	Set up your financial reporting preferences		
you will	Set up your department user variable		
learn:			

#### Hyperion Department Personnel End User Training Guide

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Step	Action	Notes
1	To set the application to your home page, first click "File" in the toolbar, then select "Preferences" from the drop-down menu.	
3	To set Financial Reporting preferences, select the third vertical tab titled "Financial Reporting".	
4	Select the radio buttons to make the following selections: Default Preview Mode: PDF Preview User Point of View: On Leave all other preferences at their default selections and click "OK".	

	Preferences ×	
	General Default Preview Mode Merge Equivalent Prompts	
	ChTML Preview Annotation Print Details	
	Vuer Point of View Thousands Separator Preview © Comma	
	Francial Reporting     Off     O Prend       On     O Indexsore     O Space	
	Planning December Security Decimal Security Predicts and Decimal Security	
	Mode     Export To     Orama       Mode     Export To     Ø Period       © smart View     Ø Worksheet     O Underscore	
	Constant free Constant Co	
	Word Export	
	Export As O Image / deal	
	Doament(.doc)	
	1960 IX Cancel	
5	To see these changes take place, click "Log Off" in the top right area of the	
	screen.	
	Logged in as TrainingTest Help Log Off	
	<b></b>	
	Search: 💽 Advanced	
	*	
	<u>Vi</u> ew •	
6	Log back in by entering your eKey and password and click "Log On".	
	User Name:	
	ekey	
	Password:	
	Log On	
_	To set your Department user variable, select the arrow next to "Preferences"	
7	in the bottom left of your screen.	
	Preferences	
8	Select the 4th horizontal tab titled "User Variable Options".	
_		
9	Select your Department User Variable to the top level of your department by	
	either typing in the department member name, or by using the member	
	selector to navigate through the hierarchy. Click "Save".	
	User Preferences	
	Application Settings Display Options Printing Options User Variable Options	
	Dimension User Variable Name Selected Member	
	Department Department User V DPFN00000000	



	Lesson 3: Using Member Selectors
Lesson Overview	This lesson will guide users through the steps to open and use member selectors throughout the application.
In this lesson you will learn:	<ul> <li>Navigate to the Manage Expanded Requests form</li> <li>Use the member selector to select a member in a runtime prompt</li> </ul>

Step	Action	Notes
1	Navigate to the Manage Expanded Requests form by going to My Task List $ ightarrow$	
<b>–</b>	Position Management → Manage Single Position.	
	Forms         My Task List         Personnel Management         Manage Personnel         Manage Enployees by Department         Manage South Sty Department         Manage Department         Manage Department <th></th>	
	▷     Image: Network Personnel       ▷     Image: Operating Preparation       ▷     Image: Expanded Requests       ▷     Image: Actuals Rapping       ▷     Image: Personnel View CY Processt	
2	Right click on this form, then click "Move Position" from the right click menu.	
2	This will display a runtime prompt.	
	Terminate Employee	
	Change Full Time / Part Time Status	
	Cange Max Headcount	
	inactivate Position ►	
	C Sync Position with HCM	
	Edit.	
3	In the field that says "Select Target Department", you can either type in the	
	Department ID, or use the <b>member selector</b> to select your Department by	
	clicking the member selector icon to the right of the input field. Click on the	
	member selector icon.	
	Runtime Prompts - PSTN_RULESET_STATUSCHANGE_Move_Position     X       Prompt. Text.     Vale       Image: Start Registry of the start	
4	The member selection window now displays a list of all the departments that	
	you have access to.	
	Runtime Prompts - FJISTINT_Add_Budget_Request × Member Selection ×	
	Dimensions Department lue  Hembers Vagables	
	Image: Control of the second secon	
	C PRI02010000     PRI02010000     C CONTROLLERS AD.     O PRI0201000     C PRI020100     C PRI02010     C PRI020100     C PRI02010     C PRI020100     C PRI020100     C PRI020100	



5	On the left side of the window, click on a department to select it. Then click on the blue "Add" arrow to move the selected department to the right side of the window. Click "OK".	You can also search for a member by typing all or part of the member name in the search bar and then clicking the search icon. To clear filtered search results, clear the search criteria and then click the Refresh icon
6	Now the "Enter Department" field displays with the department that you selected using the member selector.	The member selector tool is useful when you are unsure of the exact dept ID number that you would like to select.
7	When using the member selector within report prompts, there are a few differences to be aware of. Navigate to the "Explore" page, then click on the Position Reports folder to open it.	
8	Double click on the BAT Department Summary to open it—the prompt window will display.	
9	The first prompt entry, "Enter Department", also has the member selector icon next to the text box. Click on the member selector icon.	





	Lesson 4: Using Data Form Point of Views (POVs)
Lesson Overview	This lesson will guide users through the steps to change the Point of View (POV) on a data form.
In this lesson	Navigate to a form that utilizes the point of view feature

- you will learn:
- Change the point of view on a data form

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Step	Action	Notes
1	Navigate to the Manage Employees by Department form by going to My Task List → Personnel Management → Manage Personnel → Manage Employees by Department.	
2	At the top of this form, you will see the Point of View bar with a "Go" arrow to the right of the POV. On this form, the Department and Version dimensions are located in the POV.	
3	To change your Point of View and select a different Department, click on the arrow next to the Department dimension. This will display the list of Department members that you are able to select.	
4	Select a new Department member from the drop-down list, then click the "Go" arrow to save your POV selection.	After changing your POV, you must click the "Go" arrow to save your changes.

#### Hyperion Department Personnel End User Training Guide

	Task List Sta	itus			
	Task - Mana	ge Employees by Department	Task Instructions		
		Wears:FY	22		
	EN07010	000 - ADMINISTRATION Vorking			
	Page Dim	ension	×		
	Member		mount from HC		
	FN0203	0100 - CAPITAL & GRANT ADMIN 0200 - FEMA REPORTING 0300 - CAPITAL ACCOUNTING	▲ 168,874 Yes		
	FN0203	0400 - GRANT ACCOUNTING	70,189 Yes		
	FN0204	0100 - DISBURSEMENTS ADMIN 0200 - ACCOUNT'S PAYABLE 0300 - PAYROLL	93,992		
		0400 - BANK RECONCILIATION 0500 - ACCOUNTS PAYABLE WORKFLO	78,409		
	FN0301	0000 - ADMINISTRATION 0000 - ERP SUPPORT	68,655		
	FN0303	0000 - FIN BUS SOLUTIONS APP SUPPO			
		0000 - ADMINISTRATION	62,833		
			64,007		
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	Lesson 5: Saving Data to a Data Form
Lesson Overview	This lesson will guide users through the steps to enter and save data on a data form.
In this lesson you will learn:	<ul> <li>Navigate to a writeable form where users can enter and save data</li> <li>Enter data to a data form</li> <li>Save the data you entered to the form</li> </ul>

Step	Action	Notes
1	Navigate to the Expense Input – ChartFields in Row form by going to My Task	
1	List ->Personnel Management ->Manage Personnel ->Attrition Rates.	
	Forms	
	My Task List	
	Personnel Management	
	Manage Personnel     Se Manage Employees by Department	
	Manage Positions by Department	
	▷ S <sup>M</sup> Manage Single Employee ▷ S <sup>M</sup> Manage Single Position	
	Section 2 Section 2 and 2	
	Set Attrition Rates	
	Review Personnel	
2	Expand the form until you see your divisions	
	Second:BegBalance     Image: Second Sec	
	Budget Rate	
	> FN01000000 - DIRECTOR'S OFFICE	
	> FN02000000 - CONTROLLERS DIVISION	
	FN03000000 - FIN BUSINESS SOLUTIONS SUPPOR T	
	<ul> <li>FN04000000 - BOND ADMINISTRATION DIVISION</li> <li>FN05000000 - CASH MANAGEMENT DIVISION</li> </ul>	
	FN06000000 - TAX COLLECTOR'S DIVISION	
	> FN07000000 - FIN, COMPLIANCE & ADMIN DIV	
	> FNCP0000000 - FINANCE CAPITAL	
	N00000000 - FINANCE DEPARTMENT	
3	Click in a white cell and begin typing in a number to enter data at that	White cells signify a
5	intersection. After typing in an amount, the cell color will change from white	writeable cell, while
	to yellow, signifying that the data has not yet been saved.	gray cells signify
	Period:BegBalance	that they are read-
	September 2015     Septembe	only.
	Pudget Pate	
	▶ FN01000000 - DIRECTOR'S OFFICE .02	
	▷ FN02000000 - CONTROLLERS DIVISION .03 ▷ FN03000000 - FIN BUSINESS SOLUTIONS SUPPORT .04	
	FN04000000 - BOND ADMINISTRATION DIVISION	
	> FN05000000 - CASH MANAGEMENT DIVISION	
	FN06000000 - TAX COLLECTOR'S DIVISION	
	FN07000000 - FIN, COMPLIANCE & ADMIN DIV     FNCP0000000 - FINANCE CAPITAL	
	FN00000000 - FINANCE DEPARTMENT	
		22



	Module 4: Position and Employee Forms
Overview	This module includes the following lessons:
	<ul> <li>Lesson 1: Manage Employees by Department</li> <li>Lesson 2: Manage Positions by Department</li> </ul>
	Lesson 3: Manage Single Employee
	<ul> <li>Lesson 4: Manage Single Position</li> </ul>

• Lesson 5: Personnel Details



#### Module 4: Key Terms

The following key terms are used in this Module:

EMPVacancy	Vacancy record for the selected position. The Budget Amount will be blank for this record if a vacancy does not exist.
Level 0	Lowest level of a dimension and hierarchy in Hyperion. For department, Level 0 would be the lowest level of department in the department / division / section / sub-section / unit structure

## inf**e**rms


- Navigate to the Manage Employees by Department form
- Select your Department in the Point of View

# In this lesson you will learn:

Review the form

Step	Action	Notes
1	From the home screen, navigate to the Manage Employees by Department form by going to My Task List ->Personnel Management ->Manage Employees by Department.	
	> Forms         My Task List         ✓       Personnel Management         ✓       Manage Personnel         ✓       Manage Single Employees by Department         >       Ø Manage Single Employee         >       Ø Manage Single Employee         >       Ø Manage Covertine Bluckets         >       Ø Manage Covertine Bluckets         >       Ø Manage Covertine Bluckets         >       Ø Manage Department Halocaton Defaults         >       Ø Manage Department Halocaton Defaults         >       Ø Manage Department Halocaton Defaults         >       Ø Review Personnel	
2	Click on the drop-down arrows next to the Department dimension in the point of view (POV) and select your Department. Click the "Go" arrow to save your selection.	
	Task List Status         Task - Manage Employees by Department Task Instructions         Task - Manage Employees by Department Task Instructions	
3	Review the form. You will now see employees listed in the rows according to the Department selected in the POV.	<ul> <li>This form will not show any vacancies in the</li> </ul>
	Table List Soution     Table - Makes in the productions in the productions in the production of the production o	selected department.
	PROC0000001         CRETING MORE - 1990-1386         TEXAS         Procession         <	
	PO000000000000000000000000000000000000	

	Lesson 2: Manage Positions by Department
Lesson Overview	<ul> <li>The Manage Positions by Department form allows users to select their Level 0 Department in the Point of View and displays the position vacancy records in the rows. This form displays the following Accounts in the columns:</li> <li>Budget Amount -&gt;Budget amount (salary plus other compensation) for the vacancy. This value is calculated in Hyperion.</li> <li>Position Description -&gt;Text field describing the position which can provide additional detail that the job code does not provide. For existing positions, this value is sourced from HR.</li> <li>Full Time / Part Time -&gt;Full Time / Part time status for the position. On the Manage form, the value displayed is the budget year ending value (September value) since this value can change mid-budget year. For existing positions, this value is sourced from HR.</li> <li>FTE – Vacancy FTE value for the position. This value should match the Total Vacant</li> </ul>
	<ul> <li>FTE. On the Manage form, the value displayed is the budget year ending value (September value) since this value can change mid-budget year.</li> <li>Job Code -&gt;Job Code for the position. For existing positions, this value is sourced from HR.</li> <li>Salary Grade -&gt;Salary grade assigned to the position. For existing positions, this value is sourced from HR.</li> <li>Step - Default step assigned to the position. This value is assigned in Hyperion based on a default table managed by OMB (usually the mid-point step). For positions assigned a range salary grade, this field will be blank.</li> <li>Union -&gt;Union code for the position. For existing positions, this value is sourced from HR.</li> </ul>
	<ul> <li>Standard Hours -&gt;Standard hours for employee. This value is for reporting purposes only and does not drive any calculations. For existing employees, this value is sourced from HR.</li> <li>Standard FTE – Standard FTE for the position. This value should match the FTE for all of the employees assigned to the position. On the Manage form, the value displayed is the budget year ending value (September value) since this value can change mid-budget year. For existing positions, this value is sourced from HR.</li> <li>Total Vacant FTE – Total number of vacant FTE's in the position. This value is calculated in Hyperion by subtracting the total number of filled FTE's from the Max FTE. On the Manage form, the value displayed is the budget year.</li> <li>Total Filled FTE -&gt;Total number of filled FTE's in the position. This value is calculated in Hyperion by adding up the FTE field for all employees assigned to the position. On the Manage form, the value displayed is the budget year.</li> <li>Max FTE -&gt;Total number of filled FTE's in the position. This value is calculated in Hyperion by adding up the FTE field for all employees assigned to the position. On the Manage form, the value displayed is the budget year ending value (September value) since this value can change mid-budget year.</li> <li>Max FTE - Max FTE for the position. This value is calculated in Hyperion by adding up the Standard FTE. On the Manage form, the</li> </ul>



value displayed is the budget year ending value (September value) since this value can change mid-budget year.

- Max Headcount ->Max Headcount for the position. On the Manage form, the value displayed is the budget year ending value (September value) since this value can change mid-budget year. For existing positions, this value is sourced from HR.
- Navigate to the Manage Positions by Department form
- Select your Department in the Point of View
- you will learn:

In this lesson

• Review the form

#### Hyperion Department Personnel End User Training Guide



Step	Action	Notes
1	From the home screen, navigate to the Manage Positions by Department form by going to My Task List ->Personnel Management ->Manage Positions by Department.	
2	Click on the drop-down arrows next to the Department dimension in the point of view (POV) and select your Department. Click the "Go" arrow to save your selection.	

## 3 Review the form. You will now see positions listed in the rows according to the Department selected in the POV.

	Mears:FY22		Scen:	ario:Budget		🖳 Req	uests:Base			
FN06100100 - C	REDIT & COLLEC	Working								
	Budget Amount	Position Description	FT PT	FTE	1	Job Code	Salary Grade	Step	Union	
PO500003983		CREDIT & COL FIN SECT MGR	Full Time	0.00	CRANE & MAINT	F SUPPLY SUP - 001342	SG0003		Non Bargaining - L	
PO500003986		FINANCE COLLECTION SPECIALIST	Full Time	0.00	FINANCE COLLE	CTION SPECIALIST - 000308	SG0003	5	Local199 - General Employees -	н
PO500003987		FINANCE COLLECTION SPECIALIST	Full Time	0.00	FINANCE COLLE	CTION SPECIALIST - 000308	SG0003	5	Local199 - General Employees -	н
PO500003988		CREDIT & COLLECTIONS REP	Full Time	0.00	CREDIT & COLLI	ECTIONS REP - 000311	SG0003	5	Local199 - General Employees -	н
POS00003989		ACCOUNT CLERK	Full Time	0.00	ACCOUNT CLER	к - 000310	SG0003	5	Local199 - General Employees -	н
PO500003990		MEDICAL BILLING CLERK	Full Time	0.00	MEDICAL BILLIN	IG CLERK - 000304	SG0003	5	Local199 - General Employees -	н
PO500003991		HOSPITAL ACCOUNT CLERK	Full Time			DUNT CLERK - 000307	SG0003		Local199 - General Employees -	
PO500003992		ACCOUNTANT 2	Full Time	0.00	ACCOUNTANT 2	2 - 000316	SG0003	5	GSAF - OPEIU Local 100 - K	

The Budget
Amount will be
blank of the
position does
•
not have any
vacancies

-

\_

The FTE column
will indicate if
the position has
any vacancies at
the end of the
budget year. If
there is a
Budget Amount
and the FTE
column is blank,
that means the
vacancy went
away sometime
in the budget
year. The FTE
row on the
Personnel
Details-Salary
tab will provide
that detail.

	Lesson 3: Manage Single Employee
Lesson Overview	The Manage Single Employee form allows users to select an employee in the Point of View and displays the associated Level 0 Department and Position number in the rows. This form displays the following Accounts in the columns:
	<ul> <li>Budget Amount – Budget amount (salary plus other compensation) for the employee. This value is calculated in Hyperion</li> </ul>
	• <b>Employee Name</b> – First and last name of employee. For existing employees, this value is sourced from HR
	• <b>Position Description</b> – Text field describing the position which can provide additional detail that the job code does not provide. For existing employees, this value is sourced from HR
	• Full Time / Part Time – Full Time / Part time status for the position. On the Manage form, the value displayed is the budget year ending value (September value) since this value can change mid-budget year. For existing employees, this value is sourced from HR
	• FTE –FTE value for the position or employee. On the Manage form, the value displayed is the budget year ending value (September value) since this value can change mid-budget year. For existing employees, this value is sourced from HR. For the vacancy record, this value should be the same as the Total Vacant FTE field.
	• Job Code – Job Code for the position and employee. For existing positions, this value is sourced from HR
	• Salary Grade – Salary grade assigned to the position and employee. For existing positions and employees, this value is sourced from HR
	• <b>Step</b> – Step assigned to the employee. For employees on a range salary grade, this field will be blank. For existing employees, this value is sourced from HR.
	• <b>Pay Anniversary Date</b> – Current pay anniversary date for the employee. This date is used to calculate step and merit increases. For existing employees, this value is sourced from HR
	• Longevity Date – Longevity date for the employee. This date is used to determine timing of the budget year longevity bonus. For existing employees, this value is sourced from HR
	• Longevity Years – Current longevity years for the employee. This number is used to calculate longevity bonus percent. For existing employees, this value is sourced from HR
	• <b>Union</b> – Union code for the position. For existing employees, this value is sourced from HR
	• <b>Headcount</b> – Headcount for employee. Should always be 1 for existing employees. This value is for reporting purposes only and does not drive any calculations. For existing employees, this value is sourced from HR
	• Standard Hours – Standard hours for employee. This value is for reporting purposes only and does not drive any calculations. For existing employees, this value is sourced from HR

• Review the form



In this lesson you will learn:

- Navigate to the Manage Single Employee form
- Select an Employee in the Point of View

#### Hyperion Department Personnel End User Training Guide

Step	Action	Notes
1	From the home screen, navigate to the Manage Single Employee form by going to My Task List ->Personnel Management ->Manage Single Employee.	
2	Click on the drop-down arrows next to the Employee dimension in the point of view (POV) and select an Employee. Click the "Go" arrow to save your selection.	
3	Review the form. You will now see data reflected on the form for the employee selected in the POV.      Task List Status     Tesk Instructors     Wers:FY22     Wers:	

	Lesson 4: Manage Single Position
Lesson Overview	The Manage Single Position form allows users to select a Position in the Point of View and displays the Level 0 Department, vacancy record and assigned employees in the row. This form displays the following Accounts in the columns:
	<ul> <li>Budget Amount – Budget amount (salary plus other compensation) for the employee or vacancy. This value is calculated in Hyperion</li> <li>Employee Name – First and last name of employee. This will be blank for the EMPVacancy record. For existing employees, this value is sourced from HR</li> <li>Position Description – Text field describing the position which can provide additional detail that the job code does not provide. For existing employees, this value is sourced from HR</li> <li>Full Time / Part Time – Full Time / Part time status for the position. On the Manage form, the value displayed is the budget year. For existing employees, this value is sourced from HR</li> <li>FTE –FTE value for the employee. On the Manage form, the value displayed is the budget year. For existing employees, this value is sourced from HR</li> <li>FTE –FTE value for the employee. On the Manage form, the value displayed is the budget year. For existing employees, this value is sourced from HR</li> <li>Job Code – Job Code for the employee. For existing employees, this value is sourced from HR</li> <li>Salary Grade – Salary grade assigned to the employee. For existing employees, this value is sourced from HR</li> <li>Step – Step assigned to the employee. For employees on a range salary grade, this field will be blank. For existing employees, this value is sourced from HR</li> <li>Step – Step assigned to the default value assigned in Hyperion</li> <li>Pay Anniversary Date – Current pay anniversary date for the employee. This date is sourced from HR</li> <li>Longevity Date – Longevity date for the employee. This number is used to calculate step and merit increases. For existing employees, this value is sourced from HR</li> <li>Longevity Years – Current longevity years for the employee. This number is used to calculate longevity bonus percent. For existing employees, this value is sourced from HR</li> <li>Longevity Years – Current longevity years for the employee. This numb</li></ul>

- Total Vacant FTE Total number of vacant FTE's in the position. This value is calculated in Hyperion by subtracting the total number of filled FTE's from the Max FTE. On the Manage form, the value displayed is the budget year ending value (September value) since this value can change mid-budget year. Only applies to the vacancy record.
- Total Filled FTE ->Total number of filled FTE's in the position. This value is calculated in Hyperion by adding up the FTE field for all employees assigned to the position. On the Manage form, the value displayed is the budget year ending value (September value) since this value can change mid-budget year. Only applies to the vacancy record.
- Max FTE Max FTE for the position. This value is calculated in Hyperion by multiplying the Max Headcount by the Standard FTE. On the Manage form, the value displayed is the budget year ending value (September value) since this value can change mid-budget year. Only applies to the vacancy record.
- Max Headcount ->Max Headcount for the position. On the Manage form, the value displayed is the budget year ending value (September value) since this value can change mid-budget year. For existing positions, this value is sourced from HR. Only applies to the vacancy record.

In this lesson you will learn:

- Navigate to the Manage Single Position form
- Select a Position in the Point of View
- Review the form

Step	Action	Notes
1	From the home screen, navigate to the Manage Single Position form by going to My Task List ->Personnel Management ->Manage Single Position.	
2	Click on the drop-down arrows next to the Position dimension in the point of view (POV) and select a Position. Click the "Go" arrow to save your selection.	If you do not know the position number, you can find the position on Manage Positions by Department and note the number, then come back to this form
3	Review the form. You will now see data reflected on the form for the position selected in the POV.	This form will show both the vacancy record and all employees assigned to the position



	Lesson 5: Personnel Details
Lesson Overview	<ul> <li>The Personnel Details composite form contains 6 horizontal tabs that display data specific to an employee or position record. These 6 tabs are:</li> <li>Header</li> <li>Salary</li> <li>Other Compensation</li> <li>Allocation</li> <li>Calculated Compensation</li> </ul>
In this lesson you will learn:	<ul> <li>Calculated Compensation</li> <li>Allocated Compensation</li> <li>Navigate to the Personnel Details form from the right click menu</li> <li>Review each tab in the Personnel Details composite form</li> </ul>

Step	Action	Notes
1	From the home screen, navigate to the Manage Employees by Department form by going to My Task List ->Personnel Management ->Manage Employees by Department.	
2	Personnel       Personnel         Wanage Toploves by Department         Wanage Postions by Department         Wanage Postion by Department         Wanage Postion by Personnel         Wanage Postion by Department Allocation Defaults         Wanage Postion         W	
	your selection.	
	Task - Manage Employees by Department         Task Instructions	
	Image: Scenario:Budget       FN06100100 - CREDIT & COLLECT Working       Page Dimension	
	Page Dimension     ×     Salary       Member     Job Code     Grade	
	Member     FN06040000 - FAST PAYMENT SECTION     AMINT SUPPLY SUP - 001342     SG000355       FN060500000 - AUTO TAG SECTION     COLLECTION SPECIALIST - 000308     SG000308	
	FN06070000 - CONVENTION & TOURISM SECTION FN06080000 - LOCAL BUSINESS TAX SECTION EN06090000 - TPP & ENEORCEMENT SECTION	
	FN05100100 - CREDIT & COLLECTIONS Z FN07010000 - ADMINISTRATION COLLECTIONS REP - 000311 SG000311	
	FN07020000 - FIN COMPLIANCE         CLERK - 000310         SG000310           FN07030000 - FIN PROCUREMENT         BILLING CLERK - 000304         SG000304           FNCP020000 - FIN - INTANG. CAP - ERP         V         V	
3	Right click on an employee or position record and select "Personnel Details" from the right click menu. This brings you to the Personnel Details composite form.	

	Task List Status			
	Task - Manage Employees by Department         Task Instructions			
	∰Vears:FY22 Budget			
	FN06100100 - CREDIT & COLLECT V Working			
	Exclude Employee			
	Budget Amount from HCM Update Employee Name CRISTINA MEKIN			
	POS00003983 CRISTINA MEKIN - 00 Yes CHARLYN Y RAMIREZ			
	POS00003986 CHARLYN RAMIREZ - Terminate Employee 189			
	POS00003987 DAMARIS RAUDALES Undo Transfer Employee 992			
	Edit EMFANIE C DAVIS			
	Adjust DENISE 8 POPPS			
	POS00003989 DENISE POPPS - 0021 555	The beader tab		
4	After navigating to the Personnel Details composite form, you will see there	The header tab		
	are 6 horizontal tabs. Click on the first tab: "Header" and review the	repeats most of the		
	information on this tab.	same accounts as		
		the Manage form.		
	Task List Status Task - Manage Employees by Department Task Instructions	For employees, this		
	Manage Employees by Department > Personnel Details	form will also show		
	CREATE COLLECTIONS     MyCepartment:FN06100 100 - CREDIT & COLLECTIONS     MyCesson:Working     MyCessFY22     Position:PO500003983	the Accrued Sick,		
	Requests:Base     Requests:Base     Quests:Base     Quest	Vacation and		
	Full Time /Part Salary Anniversary Longevity Standard			
	Position Description         Employee Name         Time         FTE         Job Code         Union         Grade         Date         Date         Years         Hours         Head           CREDIT & COL FID SECT         CRISTIDA         MSR         Part Time         0.50         GRAME & MAINT SUPPLY SUP-001342         Non Bergaining -L. SG000355         10/7/20         12/29/86         33.00         20.00	Holiday Hours,		
	10 St	which drive the		
		termination payout		
		calculation if the		
		calculation if the		
		calculation if the employee is		
		calculation if the employee is terminated in		
		calculation if the employee is terminated in Hyperion		
5	Click on the second tab: "Salary" and review the information on this tab.	calculation if the employee is terminated in Hyperion The Salary tab will		
5	Click on the second tab: "Salary" and review the information on this tab.	calculation if the employee is terminated in Hyperion		
5	Click on the second tab: "Salary" and review the information on this tab.	calculation if the employee is terminated in Hyperion The Salary tab will		
5	Task List Status	<ul> <li>calculation if the</li> <li>employee is</li> <li>terminated in</li> <li>Hyperion</li> <li>The Salary tab will</li> <li>show the</li> <li>breakdown of base</li> </ul>		
5	Task List Status Task - Hanage Employees by Department Task Instructions	<ul> <li>calculation if the employee is terminated in Hyperion</li> <li>The Salary tab will show the breakdown of base salary and then any</li> </ul>		
5	Task List Status         Task Instructions         Manage Employees by Department - Personnel Details         Image Employees Department - Personnel Details	<ul> <li>calculation if the employee is terminated in Hyperion</li> <li>The Salary tab will show the breakdown of base salary and then any adjustments,</li> </ul>		
5	Task List Status         Task - Manage Employees by Department Task Instructions         Manage Employees by Department > Personnel Details         Im_Scenario-Budget       Im_Seconario-Budget         Im_Scenario-Budget       Im_Seconario-Budget         Im_Scenario-Budget       Im_Seconario-Budget         Im_Scenario-Budget       Im_Seconario-Budget         Im_Scenario-Budget       Im_Seconario-Budget         Image: Task - Task	calculation if the employee is terminated in Hyperion The Salary tab will show the breakdown of base salary and then any adjustments, including COLA,		
5	Task List Status         Task - Manage Employees by Department Task Instructors         Manage Employees by Department > Personnel Details         Image Employees by Department > Personnel Details       Image Employees by Department > Personnel Details         Image Employees by Department > Personnel Details       Image Employees by Department > Personnel Details         Image Employees by Department > Personnel Details       Image Employees by Department > Personnel Details         Image Employees by Department > Personnel Details       Image Employees by Department > Personnel Details         Image Employees by Department > Personnel Details       Image Employees by Department > Personnel Details         Image Employees by Department > Personnel Details       Image Employees by Department > Personnel Details         Image Employees by Department > Personnel Details       Image Personnel Details       Image Personnel Details         Image Employees by Department > Personnel Details       Image Personnel Details       Image Personnel Details       Image Personnel Details         Image Employees Details = D	calculation if the employee is terminated in Hyperion The Salary tab will show the breakdown of base salary and then any adjustments, including COLA, merit, step		
5	Task List Status         Task - Hanage Employees by Department       Task Instructions         Manage Employees by Department > Personnel Details         Missinge Employees by Department > Personnel Details         Missinger Employees Department > Personnel Detai	calculation if the employee is terminated in Hyperion The Salary tab will show the breakdown of base salary and then any adjustments, including COLA, merit, step increases and even		
5	Task List Status         Task - Manage Employees by Department Task Instructions         Manage Employees by Department - Personnel Details         Manage Employees by Department - Personnel Details       Employees colspan="2">Employees colspan="2"Employees colspan="2"E	calculation if the employee is terminated in Hyperion The Salary tab will show the breakdown of base salary and then any adjustments, including COLA, merit, step		
5	Task: Initial Colors           Task: Initial Colors           Wanage Employees by Department - Personnel Details           Manage Employees by Department - Personnel Details         Employee: CRISTINA MEXIN - 00013185         Employee: CRISTINA MEXIN - 00013185           Requests:Base         Employee: CRISTINA MEXIN - 00013185         Employee: CRISTINA MEXIN - 00013185         More Transmission         Alocated Compensation           Header         Salary         Other Compensation         Alocated Compensation         Alocated Compensation         Alocated Compensation           NoFE         Full Time / Part Time	calculation if the employee is terminated in Hyperion The Salary tab will show the breakdown of base salary and then any adjustments, including COLA, merit, step increases and even		
5	Task List Status         Task - Hanage Employees by Department Task instructors         Minage Employees by Department > Personnel Details         #inage Employees by Department > Personnel Details       State = 100000000000000000000000000000000000	calculation if the employee is terminated in Hyperion The Salary tab will show the breakdown of base salary and then any adjustments, including COLA, merit, step increases and even furlough.		
5	Task List Status           Task Instructions           Manage Employees by Department: Plo5/00:000 - CREDIT & COLLECTIONS           Were subject to the provide of the provi	<ul> <li>calculation if the employee is terminated in Hyperion</li> <li>The Salary tab will show the breakdown of base salary and then any adjustments, including COLA, merit, step increases and even furlough.</li> <li>The Salary tab will</li> </ul>		
5	Fask: List Status           Task: Instructions           Manage Employees by Department: Personnel Details           Manage Employees by Department: Personnel Details         Seconario:Budget         Apployee:CRISTINA MEXIN - 00013185           Memory Employees by Department: Personnel Details         Seconario:Budget         Apployee:CRISTINA MEXIN - 00013185           Memory Defaultion         Apployee:CRISTINA MEXIN - 00013185         Personnel Details         Mory           Media         Salary         Other Compensation         Alocated Compensation         Alocated Compensation           Mo. FE         Full Time / Part Time	<ul> <li>calculation if the employee is terminated in Hyperion</li> <li>The Salary tab will show the breakdown of base salary and then any adjustments, including COLA, merit, step increases and even furlough.</li> <li>The Salary tab will also show the full</li> </ul>		
5	Fask: List Status           Task: Instructions           Manage Employees by Department: Personnel Details           Manage Employees by Department: Personnel Details         Seconario:Budget         Apployee:CRISTINA MEXIN - 00013185           Memory Employees by Department: Personnel Details         Seconario:Budget         Apployee:CRISTINA MEXIN - 00013185           Memory Defaultion         Apployee:CRISTINA MEXIN - 00013185         Personnel Details         Mory           Media         Salary         Other Compensation         Alocated Compensation         Alocated Compensation           Mo. FE         Full Time / Part Time	<ul> <li>calculation if the employee is terminated in Hyperion</li> <li>The Salary tab will show the breakdown of base salary and then any adjustments, including COLA, merit, step increases and even furlough.</li> <li>The Salary tab will also show the full time / part time</li> </ul>		
5	Fask: List Status           Task: Instructions           Manage Employees by Department: Personnel Details           Manage Employees by Department: Personnel Details           Manage Employees by Department: Personnel Details         Colspan="2">Colspan="2"           Figure Colspan="2"         Colspan="2"         Colspan="2"         Colspan="2"         Colspan="2"         Colspan="2"         Colspan="2"         Colspan="2"          Colspan="2" <th <<="" colspan="2" td=""><td><ul> <li>calculation if the employee is terminated in Hyperion</li> <li>The Salary tab will show the breakdown of base salary and then any adjustments, including COLA, merit, step increases and even furlough.</li> <li>The Salary tab will also show the full time / part time status and FTE by</li> </ul></td></th>	<td><ul> <li>calculation if the employee is terminated in Hyperion</li> <li>The Salary tab will show the breakdown of base salary and then any adjustments, including COLA, merit, step increases and even furlough.</li> <li>The Salary tab will also show the full time / part time status and FTE by</li> </ul></td>		<ul> <li>calculation if the employee is terminated in Hyperion</li> <li>The Salary tab will show the breakdown of base salary and then any adjustments, including COLA, merit, step increases and even furlough.</li> <li>The Salary tab will also show the full time / part time status and FTE by</li> </ul>
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	Task List Statust         Task List Statust         Task List Statust         Task Prisonel Details         Image Employees by Department > Personel Details         Image Employees by Cepartment > Personel Details         Image Employees Dig Department > Personel Details         Image Employee: Castron Allocation Calculated Compensation         Image Employee: Castron Personel Details         Image Employee Details         Image Part Time Dig Part Time Part Time Part Time Part Time Part Time Dig Part Time Part Time Part Time Dig Part Time Part Time Dig Part Time Dig Part Time Part Time Part Time Dig Pa	<ul> <li>calculation if the employee is terminated in Hyperion</li> <li>The Salary tab will show the breakdown of base salary and then any adjustments, including COLA, merit, step increases and even furlough.</li> <li>The Salary tab will also show the full time / part time status and FTE by</li> </ul>		
5	Task 1.81 Status         Task 1.91 Sage Employees by Department Task Instructions         Task 1.91 Sage Employees by Department 2.Provide Details         Task 1.91 Sage Employees Details         Task 2.91 Sage Andread Engloyee Details	<ul> <li>calculation if the employee is terminated in Hyperion</li> <li>The Salary tab will show the breakdown of base salary and then any adjustments, including COLA, merit, step increases and even furlough.</li> <li>The Salary tab will also show the full time / part time status and FTE by month</li> <li>The other</li> </ul>		
	Task List Statust         Task List Statust         Task List Statust         Task Prisonel Details         Image Employees by Department > Personel Details         Image Employees by Cepartment > Personel Details         Image Employees Dig Department > Personel Details         Image Employee: Castron Allocation Calculated Compensation         Image Employee: Castron Personel Details         Image Employee Details         Image Part Time Dig Part Time Part Time Part Time Part Time Part Time Dig Part Time Part Time Part Time Dig Part Time Part Time Dig Part Time Dig Part Time Part Time Part Time Dig Pa	<ul> <li>calculation if the employee is terminated in Hyperion</li> <li>The Salary tab will show the breakdown of base salary and then any adjustments, including COLA, merit, step increases and even furlough.</li> <li>The Salary tab will also show the full time / part time status and FTE by month</li> <li>The other compensation tab</li> </ul>		
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	Task 1.81 Status         Task 1.91 Sage Employees by Department Task Instructions         Task 1.91 Sage Employees by Department 2.Provide Details         Task 1.91 Sage Employees Details         Task 2.91 Sage Andread Engloyee Details	<ul> <li>calculation if the employee is terminated in Hyperion</li> <li>The Salary tab will show the breakdown of base salary and then any adjustments, including COLA, merit, step increases and even furlough.</li> <li>The Salary tab will also show the full time / part time status and FTE by month</li> <li>The other compensation tab</li> </ul>		

	Task List Status         Task - Hanage Employees by Department       Task / Hanage Employees by Department / Hots (10:00 - CREDT & COLLECTIONS       Werescript20       Peartment / Hots (10:00 - CREDT & COLLECTIONS         Werescript20       Peartment / Hots (10:00 - CREDT & COLLECTIONS       Werescript20       Peartment / Hots (10:00 - CREDT & COLLECTIONS         Werescript20       Peartment / Hots (10:00 - CREDT & COLLECTIONS       Werescript20       Peartment / Hots (10:00 - CREDT & COLLECTIONS         Register Compensation       Register Compensation       Peartment / Hots (10:00 - CREDT / ACULECTIONS         Register Compensation       Peartment / Colladated Compensation         Register Compensation       Peartment / Hots (10:00 - CREDT / Acula Salary       No       V res       Oct       Nov       Peartment / Hots (10:00 - CREDT / Acula Salary       No       V res       Oct       Nov <th colspa<="" th=""><th>position or employee along with their associated rates. The <b>Budget Rate</b> is the rate used when calculating the position or employee</th></th>	<th>position or employee along with their associated rates. The <b>Budget Rate</b> is the rate used when calculating the position or employee</th>	position or employee along with their associated rates. The <b>Budget Rate</b> is the rate used when calculating the position or employee
7	Click on the fourth tab: "Allocation" and review the information on this tab.	The allocation tab shows how the position or employee will be costed in the budget. Users will be able to modify the values shown on this form.	
8	Click on the fifth tab: "Calculated Compensation" and review the information on this tab:	The Calculated Compensation tab shows how the position or employee is calculated in the budget year. Each personnel record is calculated at the month level. Monthly amounts are driven off of a budget year pay period table	
9	Click on the sixth tab: "Allocated Compensation" and review the information on this tab.	managed by OMB. The allocation compensation tab shows how the calculated compensation is allocated to the chart of accounts	

M	Ianage Employees by Depa	rtment > Person	nel Details									(driven off of the
	ianage cripioyees by bepa	rulient > Person	ici Detalis									Allocation tab).
4			9								0	Anocation tabj.
	Scenario:Budget			artment:FN06100100 - CREDIT 8		EE V	ersion:Workin	ng l	Years:FY	22	Position:POS00003983	
	Requests:Base			Employee:CRISTINA MEKIN - C								
	Header Salary Othe	r Compensation	Allocation	Calculated Compensation	llocated Compensation							The very last row o
		Bude	et Amount	Allocated Account	Allocated Fu	ind	Allocated	Allocated	Allocated	Allocation	Allocated Job Code	
	SG000355	Oct	4,790.02	5001120000 - PART TIME EMPL	DYEE G5004 - CREDIT & COL	LECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - ^	the form will show
		Nov	4,790.02	5001120000 - PART TIME EMPL	DYEE G5004 - CREDIT & COL	LECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	
		Dec	7,185.02	5001120000 - PART TIME EMPL	DYEE G5004 - CREDIT & COL	LECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP	the FTE allocation.
		Jan	4,790.02	5001120000 - PART TIME EMPL	DYEE G5004 - CREDIT & COL	LECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	
		Feb	4,790.02	5001120000 - PART TIME EMPL	OYEE G5004 - CREDIT & COL	LECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	
		Mar	4,790.02	5001120000 - PART TIME EMPL	DYEE G5004 - CREDIT & COL	LECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	
		Apr	4,790.02	5001120000 - PART TIME EMPL	DYEE G5004 - CREDIT & COL	LECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	
		May	4,790.02	5001120000 - PART TIME EMPL	DYEE G5004 - CREDIT & COL	LECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	
		Jun	4,790.02	5001120000 - PART TIME EMPL	DYEE G5004 - CREDIT & COL	LECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	
		Jul	7,185.02	5001120000 - PART TIME EMPL	DYEE G5004 - CREDIT & COL	LECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	
		Aug	4,790.02	5001120000 - PART TIME EMPL	DYEE G5004 - CREDIT & COL	LECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	
		Sep		5001120000 - PART TIME EMPL			-				CRANE & MAINT SUPPLY SUP -	
		Yr2		5001120000 - PART TIME EMPL							CRANE & MAINT SUPPLY SUP -	
		Yr3		5001120000 - PART TIME EMPL							CRANE & MAINT SUPPLY SUP -	
		Yr4	62,270.21	5001120000 - PART TIME EMPL	DYEE G5004 - CREDIT & COL	LECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - V	



#### Module 4: Course Summary

Objectives Achieved Congratulations! You have completed the Position and Employee Forms course. You now should be able to:

- Navigate to the main forms within the Personnel Management task list
- Change the Point of View to see data for your Department, Employees, and Positions



	Module 5: Position and Employee Modifications
Overview	This module includes the following lessons:
	<ul> <li>Lesson 1: Change Position from Full Time to Part Time</li> <li>Lesson 2: Change Part Time FTE</li> <li>Lesson 3: Change Position from Part Time to Full Time</li> <li>Lesson 4: Change Position Max Headcount</li> <li>Lesson 5: Move Position</li> <li>Lesson 6: Sync Position with HCM</li> <li>Lesson 7: Inactivate / Reactivate Position</li> <li>Lesson 8: Add / Delete New Position</li> <li>Lesson 9: Terminate / Reactivate Position</li> <li>Lesson 10: Transfer Employee / Undo Employee Transfer</li> <li>Lesson 11: Change Salary – Step</li> <li>Lesson 12: Change Salary – Range</li> <li>Lesson 13: Add / Delete Executive Benefits</li> <li>Lesson 14: Add / Delete Executive Benefits</li> <li>Lesson 15: Update Retirement</li> <li>Lesson 17: Set Attrition Rates</li> <li>Lesson 18: Manage Department Allocation Defaults</li> <li>Lesson 19: View HCM Refresh Flag</li> </ul>



#### Module 5: Key Terms

The following key terms are used in this Module:

EMPVacancy	Vacancy record for the selected position. The Budget Amount will be blank for this record if a vacancy does not exist.
Level 0	Lowest level of a dimension and hierarchy in Hyperion. For department, Level 0 would be the lowest level of department in the department / division / section / sub-section / unit structure
Move Position	Transfer a position and all assigned employees from one level 0 department to another
Exclude from HCM Update	Flag set at the position level to indicate if the position and all assigned employees are going to be excluded from the nightly HCM refresh



L	esson 1: Change Position from Full Time to Part Time
Lesson Overview	This lesson will guide users through the steps to change a position from Full Time status to Part Time status in the budget year. This status change occurs at the position level and will impact all employees assigned to the position and the EMPVacancy record.
	The steps listed below will navigate the user to the <b>Manage Single Position</b> task, but users can also make this change from <b>Manage Positions by Department</b> .
In this lesson you will learn:	<ul> <li>Navigate to the Manage Single Positions task</li> <li>Change a position from full time to part time</li> <li>Validate the results of the calculation</li> </ul>

Step	Action	Notes
1	From the home screen, select "My Task List" and select the arrow next to the "Personnel Management" task list to expand this folder. To access the Manage Single Position form, expand the Manage Personnel folder and select the fourth task: "Manage Single Position"	
2	Click on the drop-down arrow next the Position dimension in the POV in the point of view and select a Full Time Position from the drop-down list of members. Click the "Go" arrow.	
3	Note the following values for both the EMPVacancy record and the employees in the position: ->The Full Time / Part Time column values ->The FTE value(s) for the employee(s) ->The Standard FTE value for the EMPVacancy ->The Max FTE, Total Filled FTE, Total Vacant FTE, and FTE values for the EMPVacancy	
4	Right click on the EMPVacancy record and select "Change Full Time / Part Time Status-Change Full Time to Part Time" Personnel Details Terminate Employee Change Full Time / Part Time Status Change Full Time / Part Time Status Change Max Headcount Move Position Transfire Desition	
5	In the run time prompt, select / enter the following: ->Select Position: Confirm the position to change ->Enter FTE: Enter the Part Time FTE value ->Enter Standard Hours: Enter the Standard Hours for the position ->Start Month: Use the Member Selector to select a start month. The change will take effect at the beginning of the selected month in the budget year Select Launch.	->Users should not change the "Select Position" prompt ->The Standard Hours field is for reporting only and does not drive any calculations







	Lesson 2: Change Part Time Position FTE
Lesson Overview	This lesson will guide users through the steps to change the FTE assigned to a part time position in the budget year. This status change occurs at the position level and will impact all employees assigned to the position and the EMPVacancy record.
	The steps listed below will navigate the user to the Manage Single Position task, but users can also make this change from Manage Positions by Department.
In this lesson you will learn:	<ul> <li>Navigate to the Manage Single Positions task</li> <li>Change the FTE assigned to a part time position</li> <li>Validate the results of the calculation</li> </ul>

Step	Action	Notes
1	From the home screen, select "My Task List" and select the arrow next to the "Personnel Management" task list to expand this folder. To access the Manage Single Position form, expand the Manage Personnel folder and select the fourth task: "Manage Single Position"	
	My Task List  My Task List  Personnel Administration  Personnel Management  Manage Personnel  Manage Personnel  Manage Employees by Department  Manage Positions by Department  Manage Single Employee  Manage Single Desition  Manage Overtime Buckets  Manage Seasonal and Temp Buckets  Manage Seasonal and Sea	
	Click on the drop-down arrow next the Position dimension in the POV in the	
2	point of view and select a PART TIME Position from the drop-down list of members. Click the "Go" arrow.	
	FN06100100 - CREDIT & COLLECTIONS         Budget Amount         Employee Name         Position Description         Full Transmission           EMPVacancy         CRISTINA MEKIN         CRISTINA MEKIN         CREDIT & COL FIN SECT MGR         Full Transmission         Ful	
3	Note the following values for both the EMPVacancy record and the employees in the position: ->The FTE value(s) for the employee(s) ->The Standard FTE value for the EMPVacancy ->The Max FTE, Total Filled FTE, Total Vacant FTE, and FTE values for the EMPVacancy	
4	Right click on the EMPVacancy record and select "Change Full Time / Part Time Status-Change Part Time FTE"	



5	In the run time prompt, select / enter the following:	->Users should not
5	->Select Position: Confirm the position to change	change the "Select
	->Enter FTE: Enter the new Part Time FTE value	Position" prompt
	->Start Month: Use the Member Selector to select a start month. The change	
	will take effect at the beginning of the selected month in the budget year	->The Standard
		Hours field is for
	Select Launch	reporting only and
	Runtime Prompts - PSTN_RULESET_STATUSCHANGE_PT_FTE X Prompt Text Value	does not drive any
	Select ProSton: "Porstonno2022"	calculations
	1:Enter Standard Hours:     30       1:Select Start Month:     Oct	
6	Confirm the following for both the EMPVacancy record and the employees in	
	the position:	
	->The FTE column for the employee is now the FTE value you entered in the	
	rule	
	->The Standard FTE column for the EMPVacancy record is now the FTE value	
	you entered in the rule	
	->The Max FTE, Total Filled FTE, Total Vacant FTE, and FTE columns for the	
	EMPVacancy record have been recalculated	
	2000/01/00 • VIULING • UIL H 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
	Permittation         Open State         Pret Time         0.00         CMI213 (VIII-12 UP)         Pret Time         0.00         CMI213 (VIII-12 UP)         End State         0.01 <th0.01< th="">         0.01         <th0.01< th="">         0.01         0.01<th></th></th0.01<></th0.01<>	
7	Right click on the employee record and select "Personnel Details"	
· /	E	
	Personnel Details	
	Terminate Employee	
	😨 Transfer Employee	
	Change Full Time / Part Time Status 🕨	
	Select the Salary tab and confirm the following:	
8		
	->The FTE value changes in the start month you selected in the rule	
	Header Subary Other Compensation Adocation Galaxies Compensation Adocated Compensation Verifical CV	
	BigSbluck         Age/Left         Orr         Nov         Dar         Nov         Nov         Mor	
	Annierszy Dzze 10/7/20 2007/22	
	Budget Rete         4,790.0160         4,790.	
	Cost of Living Adjustment         Budget Rate         0.01	

9	Select the Calculated Compensation tab and confirm the following:	The elements that
	->Confirm the calculated amounts starting in the start month you selected ->Elements that only apply to personnel with an FTE greater than or equal to 0.75 will not appear if the FTE was changed to a value lower than 0.75	only apply to personnel with an FTE greater than 0.74 (ex: health, dental, flex,
	Instant         Salary         Other Compensation         Advance         Code         Nov         Yes         Yes         Nov         Yes         Y	longevity bonus, pay components) will still appear on the Other Compensation tab, but they won't be calculated
10	Select the Allocated Compensation tab and confirm the following: ->The correct budget year-end FTE is allocated to the part time filled FTE account (very bottom of the data form)	These amounts will be mapped to the operating database (FINSTMT) during the next scheduled data map
11	Select the "Manage Positions ->Single" breadcrumb to return to the manage form	
12	If the vacancy member has an FTE value, you can validate the calculated and allocated compensation for that member as well	The EMPVacancy member won't have calculated or allocated compensation if the FTE is 0



13	Because you have made a change to the positionthe "Exclude from HCM	This flag on the
10	Update" column should now be marked as "Yes", indicating that this change is	EMPVacancy record
	excluded from the nightly HCM refresh.	indicates the
		position and
		assigned employees
		will no longer get
		updated as part of
		the nightly refresh
		from HCM. In order
		to clear this flag,
		users will need to
		run the Sync
		Position with HCM
		rule



Lesson 3: Change Position from Part Time to Full Time		
Lesson Overview	<ul> <li>This lesson will guide users through the steps to change the position from Part Time status to Full Time status in the budget year. This status change occurs at the position level and will impact all employees assigned to the position and the EMPVacancy record.</li> <li>The steps listed below will navigate the user to the Manage Single Position task, but users can also make this change from Manage Positions by Department.</li> </ul>	
In this lesson you will learn:	<ul> <li>Navigate to the Manage Single Positions task</li> <li>Change a position from Full Time status to Part Time Status</li> <li>Validate the results of the calculation</li> </ul>	

Step	Action	Notes
1	From the home screen, select "My Task List" and select the arrow next to the "Personnel Management" task list to expand this folder. To access the Manage Single Position form, expand the Manage Personnel folder and select the task: "Manage Single Position"	
	My Task List         Personnel Administration         Operating Administration         Personnel Management         Manage Personnel         Signal Manage Employees by Department         Signal Manage Positions by Department         Signal Manage Single Position         Signal Manage Overtime Buckets         Signal Manage Seasonal and Temp Buckets         Signal Attrition Rates         Signal Ratetres <th></th>	
2	Click on the drop-down arrow next the Position dimension in the POV in the	
	point of view and select a Part Time Position from the drop-down list of members. Click the "Go" arrow.	
3	Note the following values for both the EMPVacancy record and the employees in the position: ->The Full Time / Part Time column values ->The FTE value(s) for the employee(s) ->The Standard FTE value for the EMPVacancy	
	->The Max FTE, Total Filled FTE, Total Vacant FTE, and FTE values for the EMPVacancy	
4	Right click on the EMPVacancy record and select "Change Full Time / Part Time Status-Change Part Time to Full Time"	
5	In the run time prompt, select / enter the following: ->Select Position: Confirm the position to change ->Enter Standard Hours: Enter the standard hours for the Full-Time position	->Users should not change the "Select Position" prompt



	Chart Marth, Use the Marshey Calestente calest a start worth. The shows	
	->Start Month: Use the Member Selector to select a start month. The change will take effect at the beginning of the selected month in the budget year Select Launch Nutime Prompts - PSTN_RULESET_STATUSCHANGE_PT_TO_FT         Prompt Text         * Select Start Month:	->The Standard Hours field is for reporting only and does not drive any calculations ->Full time positions are automatically defaulted to a 1.0
6	Confirm the following for both the EMPVacancy record and the employees in the position: ->The Full Time / Part Time column is now Full Time ->The FTE column for the employee is now displaying 1 FTE indicating it as full time	FTE
	->The Standard FTE column for the EMPVacancy record is now displaying 1 FTE indicating it as full time ->The Max FTE, Total Filled FTE, Total Vacant FTE, and FTE columns for the EMPVacancy record have been recalculated	
7	Right click on the employee record and select "Personnel Details"	
8	Select the Salary tab and confirm the following: ->The Full Time / Part Time value changes in the start month you selected in the rule ->The FTE value changes in the start month you selected in the rule ->The FTE value changes in the start month you selected in the rule $ \frac{1}{10000000000000000000000000000000000$	
9	Select the Calculated Compensation tab and confirm the following: ->Confirm the calculated amounts starting in the start month you selected ->Full time position specific elements start calculating in the start month you selected in the rule ->Because the position is now Full Time, all assigned elements should be calculated	

10	Select the Allocated Compensation tab and confirm the following: ->The Allocated Account changes from part time employee to employee regular in the start month you selected in the rule ->The correct budget year-end FTE is allocated to the ""Full Time filled FTE"" account (very bottom of the data form)	These amounts will be mapped to the operating database (FINSTMT) during the next scheduled data map
11	Select the "Manage Positions ->Single" breadcrumb to return to the manage form           Task - Manage Single Position         Task Instructions           Manage Position         Scenario:Budget           Position         Personnel Details           Position         Compensation           Allocation         Calculated Compensation           Position         Description           Position         Employee Name           View         File           No_BL         MGR           MGR         Part           Part         Discon           Part         Time           No_BL         MGR	
12	If the vacancy member has an FTE value, you can validate the calculated and allocated compensation for that member as well	The EMPVacancy member won't have calculated or allocated compensation if the FTE is 0
13	Because you have made a change to the positionthe "Exclude from HCM Update" column should now be marked as "Yes", indicating that this change is excluded from the nightly HCM refresh.	This flag on the EMPVacancy record indicates the position and assigned employees will no longer get updated as part of the nightly refresh from HCM. In order to clear this flag, users will need to run the Sync Position with HCM rule

Lesson 4: Change Position Max Headcount			
Lesson Overview	This lesson will guide users through the steps to change the max headcount of a position in the budget year. This status change occurs at the position level and will impact the FTE vacancy calculation for the EMPVacancy record.		
	The steps listed below will navigate the user to the <b>Manage Single Position</b> task, but users can also make this change from <b>Manage Positions by Department</b> .		
In this lesson you will learn:	<ul> <li>Navigate to the Manage Single Position task</li> <li>Change the max headcount of a position</li> <li>Validate the results of the calculation</li> </ul>		

Step	Action	Notes
1	From the home screen, navigate to the Manage Single Position form by going to My Task List ->Personnel Management ->Manage Personnel ->Manage Single Position.	
2	Click on the drop-down arrow next to the Position dimension in the point of view (POV) and select a Position. Click the "Go" arrow to save your selection.	
3	Note the following values for the EMPVacancy record: ->Budget Amount: Budget amount for the vacancy member. Will be 0 if the FTE column is 0 for the vacancy ->Max Headcount: Max headcount for the position ->The Standard FTE: the standard FTE for the position ->The Max FTE: max headcount * standard FTE ->Vacant FTE: Max FTE ->Filled FTE (sum of employee FTE assigned to the position) ->FTE: Equal to the Vacant FTE. Used to calculate the vacancy	
	Tesk - Hanage Single Position     Task Instructions <ul> <li></li></ul>	

4	Right click on the EMPVacancy record and select "Change Max Headcount"	
	from the right click menu.	
	Task - Manage Single Position     Task Instructions	
	POS00003983 V Working V	
	Excluded from Nichtly HCM	
	Budget Amount Update	
	EMPVa Yes	
	CRISTI Terminate Employee	
	Change Full Time / Part Time Status	
	ि Change Max Headcount	
	Inactivate Position	
	문 Sync Position with HCM C Delete New Position	
5	In the run time prompt, select / enter the following:	If you enter a
5	->Select Position: Confirm the position to change	headcount lower
	->Enter New Max Headcount: Enter new max headcount for the position.	than the sum of
	->Start Month: Use the Member Selector to select a start month. The change	current employees,
	will take effect at the beginning of the selected month in the budget year	the rule will fail to
	Select Launch.	execute.
	Runtime Prompts - PSTN_RULESET_STATUSCHANGE_Max_Headcount × Prompt Text Value I	
	***         ***         ***         ***           ***         ***         2         ****	
	Oct     Vill	
6	Confirm the following for both the EMPVacancy record and the employees in	
	the position:	
	->The Budget Amount column reflects the increase / decrease to the max	
	headcount	
	->The FTE column reflects the increase / decrease to the max headcount	
	->The Max FTE and Total Vacant FTE reflects the increase / decrease to the max headcount	
	->The Max Headcount columns reflect the number you entered in the run	
	time prompt Task - Manage Single Position Task Instructions	
	Excluded from Nightly HOM Full Time / Part	
	Budget Amount         Update         Employee Name         Paration Description         Time         FTE           FN06100100 - CREDIT & COLLECTIONS         EMPVacancy         \$1,410         Yes         MGR         Part Time         0.50	
	CRISTINA MECIN - 000 13185 73,302 CRISTINA MECIN CREDIT & COL FIN SECT MGR Part Time 0.50	
	Task - Hanage Single Position     Task Instructions       Image Single Position     Task Instructions	
	POS0003983 V Working V D	
	Image: Non-Standard         Standard         Total         Total         Total         File         Max         Max Headcount           FN06100100 - CREDIT & COLLECTIONS         Exemption         Exemption	
	EMPPlacancy         Non Bargaining - L         20.00         0.50         0.50         1.00         2.00           CR1STINA MEXIN - 00013185 0         Non Bargaining - L         1.00         20.00         1.00         2.00         1.00         1.00         2.00         1.00         2.00         1.00 <td></td>	
### Right click on the EMPVacancy record and select "Personnel Details". 7 Task - Manage Single Position Task Instructions iii s Years:FY22 POS00003983 ▼ Working -E Budget Amount FN06100100 - CREDIT & COLLECTIONS EMPVacan Personnel Details Terminate Employee CRISTINA ট Transfer Employee Change Full Time / Part Time Status Select the Salary tab and confirm the following: 8 ->The FTE value is updated starting in the start month you selected ask - Manage Single Position Task Instruct sitions - Single > Personnel Detail Scenario:Budget Wersion:Working Years:FY22 .Position: Bupertment:FN06100100 - CREDIT & COLLECTIONS Requests:Base Reployee:EMPVacancy Header Salary Other Compensation Allocation Calculated Compensation Allocated Compensation YearTotal CY Adjusted BegBalance Oct No\_PE Full Time / Part Time Part Time FTE Max Headcow Standard FTE 1.00 0.50 0.50 0.50 0.50 0.50 SG000355 Pay Basis 3,359.41 Budget Rate 3,359.41 3,359.41 3,359.41 3,359.41 3,359.41 3,359.41 Budget Rate Ann 87,344.66 87,344.66 87,344.66 87,344.66 87,344.66 Cost of Liv Budget Rate 0.01 0.01 0.01 0.01 0.01 873.4466 873.4466 873.4466 873.4466 873.446 Budget Rate A Budget Rate 6.6667 6.6667 6.6667 6.6667 6.6667 Select the Calculated Compensation tab and confirm the following: 9 ->Confirm the calculated amounts starting in the start month you selected ask - Manage Single Position Task Ins W.c. Department:FN06100100 - CREDIT & COLLECTIONS Wersion:Working Means:FY22 enario:Budget Employee:EMPl/acancy Allocated Compensation Requests:Base Header Salary Other Compensation Allocation Calculated Comp Feb Salary Amount SG000355 3,359,41 3,359,41 5.039.12 3,359,41 3,359,41 3.359.41 3.359 Current Year Salary Salary Amount 3,359.41 3,359.41 5,039.12 3,359.41 3,359.41 3,359.41 3,359 Cost of Living Adjustment Salary Amount 33.59 33,59 50.39 33.59 33,59 33, 59 Total Salary Total Compensa 3,393.00 3,393.00 5,089.51 3,393.00 3,393.00 3,393.00 Life Insurance Rate Other Compensation A 7.16 7.16 10.74 7.16 7.16 7.16 FRS INVESTMENT PLAN - REGULAR (13) Other Compensation Amount 294.85 294.85 447.78 294.85 294.85 294.85 294. 210. Social Security Rate 210.37 210.37 315.55 210.37 210.37 210.37 Other Compensation Amoun Medicare Rate Other Compensation Amount 49.20 49.20 73.80 49.20 49.20 49.20 49. Total Other Compe Total Compensation 561.58 561.58 842.37 561.58 561.58 561.58 561.5 Total Pay Element Total Compensation 3,954.58 3,954.58 5,931.88 3,954.58 3,954.58 3,954.58 3.954.5 These amounts will Select the Allocated Compensation tab and confirm the following: 10 ->The correct budget year-end FTE is allocated to the full-time vacant FTE be mapped to the account (very bottom of the data form) operating database (FINSTMT) during the next scheduled data map.

	Task - Manage Single Position Ta	Total Backson Manage					
	Manage Positions - Single > Personnel D						
	Manage Posidoris - Single > Personne d	Detais					
	Scenario:Budget	් Department:FN06100100 - CREDIT & CC	LLECTIONS Wersion:W	orking Mears:FY	22 S. Position:POS0000	3983	
		S.,Employee:EMPVacancy					
	Header Salary Other Compens	sation Allocation Calculated Compensation Alloc	ated Compensation				
		Budget Amount Allocated Account	Allocated Fund Gram		Allocation Percent Allocated Job 0	Code	
	Dec	73.80 5011130000 - MICA MEDICARE H	G5004 - CREDIT & COLLECTION OP. No_Gr	ant No_Project No_Activity	100% CRANE & MAINT SUPPLY	r SUP - ^	
	Jan	49.20 5011130000 - MICA MEDICARE H		ant No_Project No_Activity	100% CRANE & MAINT SUPPLY		
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	Sep	49.20 5011130000 - MICA MEDICARE H					
	Yr2	645.98 5011130000 - MICA MEDICARE H	G5004 - CREDIT & COLLECTION OP. No_Gr	ant No_Project No_Activity	100% CRANE & MAINT SUPPLY	Y SUP -	
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	igle Position form ask - Manage Single Posi						
M	Manage Positions - Single > P	Personnel Details					
	Scenario:Budget	都Depa	rtment:FN06100100 - CRE	DIT & COLLECT	IONS		
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		r Compensation Allocation	Calculated Compensation		Compensation		
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		Budget Amount	Allocated Accourt	nt	Allocated F		
Be	cause vou have					HCM	
12	•	made a change t	o the position-	-the "Exc	lude from H		
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Up	date" column sł	made a change t	o the position- rked as "Yes",	-the "Exc	lude from H		

	Lesson 5: Move Position
Lesson Overview	This lesson will guide users through the steps to move a position from one department to another in the budget year. This rule will move both the position and all assigned employees to the selected department.
	The steps listed below will navigate the user to the <b>Manage Single Position</b> task, but users can also make this change from <b>Manage Positions by Department</b> .
In this lesson you will learn:	<ul> <li>Navigate to the Manage Single Position task</li> <li>Move a position from one department to another</li> <li>Validate the results of the calculation</li> </ul>

Step	Action	Notes
1	From the home screen, navigate to the Manage Single Position form by going to My Task List → Personnel Management → Manage Personnel → Manage Single Position.	
2	Click on the drop-down arrow next to the Position dimension in the point of view (POV) and select a Position. Click the "Go" arrow to save your selection.	
3	Right click on the EMPVacancy record and select "Move Position".	



In the run time prompt, select / enter the following: -Source Department (DO NOT CHANGE): Confirm the source department for the position ->Target Department: Use the member selector to select the target department for the move ->Select Department: Do not change this value. This is the variable that will calculate after the move is initiated. This should be set to your user variable Select Launch. Select Launch. Select Select Select the select is to your user variable Select Launch. Select Leunch. Select Select Leunch. Do not change the first prompt. Source Department is the value is incorrect, close the prompt. Source Department is the value. Source Department is the value. Select Department user vaniable. Select Department user vani			et colort ( optow the following)	Maxing a position
<ul> <li>-&gt;Source Department (DO NOT CHANGE): Confirm the source department for the position</li> <li>-&gt;Target Department: Use the member selector to select the target department for the move</li> <li>-&gt;Select Department: Do not change this value. This is the variable that will calculate after the move is initiated. This should be set to your user variable</li> <li>Select Launch.</li> <li>Select Launch.</li> <li>Select Comment with the selection of the move is initiated. This should be set to your user variable. The selected start month onwards, budget dollars will be cleared from the source department.</li> <li>Do not change the insurance were in the selected start month onwards, budget dollars will be cleared from the source department.</li> <li>Do not change the first prompt, Source Department.</li> <li>Do not change the rule again. If you are running the rule from one of the "Single" forms, be sure you right click on the source department in the rows</li> <li>The "Select Department."</li> </ul>	4	in the run time prom	pt, select / enter the following:	Moving a position
<ul> <li>the position</li> <li>-&gt;Target Department: Use the member selector to select the target department for the position</li> <li>-&gt;Start Month: Use the member selector to select the budget year start month for the move</li> <li>-&gt;Select Department: Do not change this value. This is the variable that will calculate after the move is initiated. This should be set to your user variable</li> <li>Select Launch.</li> <li>Select Members and all employees in the selected start month on wards, budget department and calculate in the target department. From the start month on and the selected start month on and the selected is the selected start month on and the selected is the selected start month on and the selected is the selected start month on and the selected is the selec</li></ul>		Source Department	(DO NOT CHANCE): Confirm the course department for	
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department for the position       ->Start Month: Use the member selector to select the budget year start month for the move       ->Select Department: Do not change this value. This is the variable that will calculate after the move is initiated. This should be set to your user variable       from one         Select Launch.       Image: Comparison of the move is initiated. This should be set to your user variable       form one         Select Launch.       Image: Comparison of the move is initiated. This should be set to your user variable       form one         Select Launch.       Image: Comparison of the move is initiated. This should be set to your user variable.       form one         Select Launch.       Image: Comparison of the move is initiated. This should be set to your user variable.       form one         Select Launch.       Image: Comparison of the move is initiated.       form one       department to another starting in the selected start month.         Select Launch.       Image: Comparison of the move is initiated.       form one of the move is initiated.       form one of the source department.         Do not change the first prompt, Source       Department.       form one of the "Single" forms, be sure you right click on the source department in the rows       form one of the "Single" forms, be sure you right click on the source department in the rows         The "Select       Department 'sprompt should show your department user variable. Do not       form one of the "Single" forms, be sure you right click on the source department 'spromet should show your departm			· Lice the member collector to collect the target	
->Start Month: Use the member selector to select the budget year start month for the move ->Select Department: Do not change this value. This is the variable that will calculate after the move is initiated. This should be set to your user variable Select Launch.			_	•
month for the move ->Select Department: Do not change this value. This is the variable that will calculate after the move is initiated. This should be set to your user variable Select Launch. Select Launch. Select move the start month onwards, budget dollars will be cleared from the source department. - Do not change the first prompt, Source Department. If this value is incorrect, close the prompt and right click and select the rule again. If you are running the rule from one of the "Single" forms, be surce department in the rows The "Select Department" prompt should show your department user variable. Do not		department for the position ->Start Month: Use the member selector to select the budget year start		
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Select Launch.				
Image: Note: The state of the source of t		Select Launch.          Runtime Prompts - PSTH_RULESET_STATUSCHANGE_Move_Position       ×         Prompt Text       Value		
cleared from the source department and calculated in the target department. - Do not change the first prompt, Source Department. If this value is incorrect, close the prompt and right click and select the rule again. If you are running the rule from one of the "Single" forms, be sure you right click on the source department in the rows The "Select Department" prompt should show your department user variable. Do not			iE_Move_Position ×	
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show your department user variable. Do not				Department"
show your department user variable. Do not				prompt should
variable. Do not				
				department user
change this value.				variable. Do not
				change this value.



10	Select the "Manage Positions ->Single" breadcrumb to return to the Manage
10	Single Positions form.
	Task - Manage Single Position Task Instructions
	Manage Positions - Single > Personnel Details
	Scenario:Budget
	Base         Base           Header         Salary         Other Compensation         Allocation         Calculated Compensation         Allocated Compensation
	Budget Amount Allocated Account Allocated F
11	Right click on the employee record in the TARGET department and select
11	"Personnel Details".
	Task - Manage Single Position     Task Instructions
	Years:FY22
	POS00003987 V Working V
	Excl
	Budget Amount U
	EMPVacancy Yes
	DAMARIS F
	FN06100100 - CREDIT & COLLECTIONS
	Controlation Control C
	DAMARIS R Change Full Time / Part Time Status  Change Max Headcount
	Orange Frank Redeard
4.2	Select the Salary tab and confirm the following:
12	->The Position Status changes from Inactive to Active starting in the start
	month you selected
13	Select the Allocation tab and confirm the following:
	->Department's default fund, grant, project, and activity is displayed on
	Allocation 1
	Task - Hunage Saugle Position Menoge Position - Single > Presonel Details
	Head of Safery Other Compensation Allocated Compensation Allocated Caregorisation Allocated Fund Allocated Fund Allocated Facet Allocated Frequet Allocated
	Alexation 1 dobt - CPERAL PLIC OPERATIONS No_Drawt No_Project No_Drawt No_Project No_Drawt Nov
	4 Alcadoro J Alcadoro 4 Alcadoro 5
14	Select the Calculated Compensation tab and confirm the following:
	->Calculated amounts are calculated starting in the start month you selected
	Task - Manage Single Position Task Instructions Manage Position - Single > Personnel Details
	A     Byperstment:PN0203000 - CAPITAL ACCOUNTING     Byverson:Working
	Requests:Base         Employee:DAMANIS RAUDALES - 00209284           Header         Salary         Other Compensation         Allocated Compensation
	Oct         Nev         Dec         Jan         Feb         Mar         Apr           50000308         Salary Amount         4,636,48         4,636,48         4,636,48         4,636,48         4,636,48
	Cf:Step Increases         Salary Amount         227.34         227.34         341.01         227.34         227.34         227.34         227.34         227.34           # Current Year Salary         Salary Amount         4,863.82
	L2 Step Increases         Salary Amount           Cost of Living Adjustment         Salary Amount         48.64         72.95         48.64         48.64         48.64
	Total Solary         Total Compensation         4,912.46         7,368.69         4,912.46         4,912.46         4,912.46           HALF STEP (HS)         Solary Annunt         4         <
	PREMIUM PAY AFSCME F, G &H (3C)         Other Compensation Amount         140.00
	Fire Remeffs         Other Compensation Amount         84.62         84.62         126.52         84.62         84.62         84.62           Health Insurance Rate         Other Compensation Amount         1.153.85         1.153.85         1.153.85         1.153.85         1.153.85           Utif Insurance Rate         Other Compensation Amount         10.37         10.37         10.37         10.37         10.37
	Utfe Insurance Rate         Other Compensation Amount         10.37         10.37         10.37         10.37         10.37           Dental Plans         Other Compensation Amount         18.69         18.69         18.69         18.69         18.69           FLORED STATE RETIREMENT SYSTEM (2) Other Compensation Amount         430.66         439.06         439.06         439.06         439.06         439.06
	FURIDAD STATE registration Amount         439,06         439,06         439,06         439,06         439,06           Social Security Rate         Offer Compensation Amount         313,25         313,25         313,25         313,25         313,25           Medicare Rate         Offer Compensation Amount         73,36         73,26         73,26         73,26         73,26
	Total Pay Element         Total Compensation         7,145,55         7,



	Lesson 6: Sync Position with HCM
Lesson Overview	This lesson will guide users through the steps to sync a position and employees assigned to the position with the latest data loaded from HR. This status change occurs at the position level and will impact all employees assigned to the position and the EMPVacancy record. The steps listed below will navigate the user to the <b>Manage Single Position</b> task, but users can also make this change from <b>Manage Positions by Department</b> .
	<ul> <li>Navigate to the Manage Single Position task</li> </ul>

In this lesson you will learn:

- Navigate to the Manage Single Position task
- Sync a position with HCM
- Validate the results of the calculation

Step	Action	Notes
1	From the home screen, navigate to the Manage Single Position form by going to My Task List → Personnel Management → Manage Personnel → Manage Single Position.	
2	Click on the drop-down arrow next to the Position dimension in the point of view (POV) and select any <b>Position that has been modified in Hyperion</b> (and therefore has the "Exclude from HCM Update" flag marked as Yes). Click the "Go" arrow to save your selection. Right click on the EMPVacancy record and select "Sync Position with HCM".	
	Years:FY22	
	POS00003987 Vorking Excluded from Nightly HCM	
	FN06 100 100 - CREDIT & COLLECTIONS       EMPVacancy       Personnel Details         DAMARIS RAUDALES       Terminate Employee       Image: Change Full Time / Part Time Status         Change Full Time / Part Time Status       Change Max Headcount         Move Position       Inactivate Position         Image: Sync Position with HCM       Delete New Position	
4	In the run time prompt, select / enter the following: - Select Position: Confirm the position to sync - Select Department: Confirm the department. This should be the department the position resides in	

	Select L	aunch.						
		Runtime Prompt	s - PSTN_RULESET		_Position_Actuals_	Final	×	
		Prompt Text			Value			
		* Select Posi			"POS00003987"	-	18	
		🐺 * Select Dep	artment:		"DPFN00000000"		Ø.,	
5	Update'	' will no lo	nger be dis	s position wit splayed on the ntly HCM refre	e screen, ind		m HCM	This is the only way to remove the "exclude" flag from
		ge Single Position T		-,				a position and its
		Years:FY2			Scenario:Budget		Re.	assigned employees
	POS000039		Working		scenano:budget		35 KE	and to have the
	FN0610010	) - CREDIT & COLLECTIO	NS EMPVacancy	Budget Amount	Employee Name	Position Description FINANCE COLLECTION SPECIALIST FINANCE COLLECTION	Full Time / Part Time Full Time	position resync from HR
		Also f - U -	damaris raudales			SPECIALIST	Full Time	The sync will copy all data for the position and employees assigned to the position from the HR staging version into the budget.
6	the posi	tion:	-	th the EMPVa	-			
	- The re	cords only	appear in	one departme	ent now (the	e original dep	artment)	
	- Positio	n Status a	nd Employ	ee Status colu	imns have b	een suppress	ed,	
	indictin	g the positi	ion and em	nployee is acti	ve for the fu	ıll budget yea	ar	

# inf**e**rms

	Lesson 7: Inactivate/Reactivate Position
Lesson Overview	This lesson will guide users through the steps to inactivate or reactivate a position in the budget year. This status change occurs at the position level and will impact all employees assigned to the position and the EMPVacancy record.
	The steps listed below will navigate the user to the Manage Single Position task, but users can also make this change from Manage Positions by Department.
In this lesson you will learn:	<ul> <li>Navigate to the Manage Single Position task</li> <li>Inactivate and reactivate a position</li> <li>Validate the results of the calculation</li> </ul>

Step	Action	Notes	
1	From the home screen, navigate to the Manage Single Position form by going to My Task List → Personnel Management → Manage Personnel → Manage Single Position.		
2	Click on the drop-down arrow next to the Position dimension in the point of view (POV) and select an ACTIVE Position. Click the "Go" arrow to save your selection.		
3	Note the following values for the EMPVacancy record and the employees assigned to the vacancy: ->Budget Amount: Note the budget amount for the employee(s) and EMPVacancy record. The EMPVacancy Budget Amount will be blank if the FTE value is 0		
	Task - Manage Single Position Task Instructions         Image: Instructions <th colspan<="" td=""><td></td></th>	<td></td>	
4	Right click on the EMPVacancy record and select "Inactivate Position - >Inactivate Position". Inactivate Position Tak Instructions POS00003990 V Working POS00003990 V Working Posonel Details MAYEA MAY		





### Select the Salary tab and confirm the following: 8 ->The Position Status changes to Inactive starting in the start month you selected Task - Manage Single Position Task Instructions Manage Positions - Single > Personnel Details Scenario:Budget Department: FN06100100 - CREDIT & COLLECTIONS Requests:Base Employee:MARILYN MAYEA - 00312693 Salary Other Compensation Allocation Calculated Compensation Allocated Compensation Header YearTotal CY Adjusted BegBalance Oct Nov No PE Position Status Inactive Inactive Inactive Inactive Full Time / Part Time Eul Time Full Time Full Time Full Time FTE 1.00 1.00 1.00 1.00 Step 7 7 8 8 8 Anniversary Date 10/7/20 10/7/21 SG000304 Pay Basis Biweekly Step Select the Calculated Compensation tab and confirm the following: 9 ->Calculated amounts are cleared starting in the start month you selected Task - Manage Single Position Task Instructions Manage Positions - Single > Personnel Details Scenario:Budget Department: FN06100100 - CREDIT & COLLECTIONS Requests:Base Employee:MARILYN MAYEA - 00312693 Header Salary Other Compensation Allocation Calculated Compensation Allocated Compensation Oct Dec Feb Nov Jan Termination Pay Other Compensation Amount 9,356,92 Social Security Rate Other Compensation Amount 580.13 135.68 Medicare Rate Other Compensation Amount Total Other Compensation Total Compensation 10,072.72 Total Pay Element 10,072.72 Total Compensation Select the Allocated Compensation tab and confirm the following: These amounts 10 ->Budget amounts are cleared starting in the start month you selected (or cleared ->No FTE is allocated (at the bottom of the form) amounts) will be mapped to the ask List Status Task - Manage Single Position Task Instructions operating nage Positions - Single > Personnel Details database Scenario:Budget Wersion:Working Department: FN06100100 - CREDIT & COLLECTIONS Requests:Ba A - 00312693 Allocated Compensation (FINSTMT) on Allocation Calculated C Header Salary Other Compet Allocated Allocated Allocated Allocation Grant Project Activity Percent during the next Budget Amount Allocated Account Allocated Fund Allocated Job Code CREDIT & COLLECTION OP. No\_Grant No\_Project No\_Activity 100% ME ion Pay Oct 9,356.92 5001550 000 - TERMINATION PA scheduled data Social Security Rate Oct 580, 13, 50.10.100000 - SOCTAL SECURITY G5004 - CREDIT & COLLECTION OP. No Grant No Project No Activity 100% MEDICAL BILLING CLERK - 000304 135.68 5011130000 - MICA MEDICARE HOSPITAL INS G5004 - CREDIT & COLLECTION OP. No\_Grant No\_Project No\_Activity 100% MEDICAL BILLING CLERK - 000304 Medicare Rate Oct map. Select the "Manage Positions ->Single" breadcrumb to return to the Manage 11 Single Position form. Task - Manage Single Position Task Instructions lanage Positions - Single > Personnel Details Scenario:Budget Department:FN06100100 - CR Requests:Base Employee:MARILYN MA Header Salary Other Compensation Allocation Calculated Compensation Allocated Compensation

### Action Notes Step Right click on the EMPVacancy record and select "Inactivate Position 1 → Reactivate Position". Task - Manage Single Position Task Instructions Years:FY22 POS00003990 - -▼ Working Excluded from Nightly HCM Update Position Status Budget Amount FN06100100 - CREDIT & COLLECTIONS Inactive EMPVacancy Personnel Details Terminate Employee MARILYN MAYE Inactive Transfer Employee Change Full Time / Part Time Status Change Max Headcount Move Position Inactivate Position Inactivate Position Reactivate Position Sync Position with HCM Delete New Position In the run time prompt, select / enter the following: Reactivating a position will 2 - Select Position: Confirm the position to reactivate reset the position and Select Launch. employees back to the budget amounts from Runtime Prompts - PSTN\_RULESET\_STATUSCHANGE\_Reactivate\_Position Prompt Text Value before the inactivation. "POS00003990 Ø8\_ The rule will fail if you try to reactivate a position that has not been inactivated or has been transferred to a different department. Confirm the following for both the EMPVacancy record and the 3 employees in the position: - The Budget Amount column should be back to how it was before you inactivated the position Task - Manage Single Position Task Instructions Years:FY22 - -POS00003990 ▼ Working Excluded from Nightly HCM Update Employee Name Budget Amount FN06100100 - CREDIT & COLLECTIONS EMPVacancy MARILYN MAYEA MARILYN MAYEA - 00312693 62.833 Right click on the employee record and select "Personnel Details". 4 Task - Manage Single Position Task Instructions Years:FY22 POS00003990 ▼ Working - -Excluded from Nightly HCM Update Budget Amount FN06100100 - CREDIT & COLLECTIONS EMPVacancy Yes MARILYN MAYE Personnel Details minate Employe Transfer Employee Change Full Time / Part Time Status Change Max Headcount Move Positio

### Select the Salary tab and confirm the following: 5 - The Position Status row has been suppressed (indicating the position is active for the budget year) Task - Manage Single Position Task Instruction anage Positions - Single > Personnel Detail Scenario:Budget Department: FN06100100 - CREDIT & COLLECTIONS Requests:Base Employee:MARILYN MAYEA - 00312693 Other Compensation Allocation Calculated Compensation Allocated Compensation Header Salary YearTotal CY BegBalance Oct Nov Dec Adjusted No\_PE Full Time / Part Time Full Time Full Time Full Time Full Time 1.00 1.00 FTE 1.00 1.00 Step 7 7 8 8 8 Anniversary Date 10/7/20 10/7/21 Select the Calculated Compensation tab and confirm the following: 6 Calculated amounts are recalculated for the year Task - Manage Single Position Task Ins ge Positions - Single > Personnel Detail Ξ.v Scenario:Budget Department:FN06100100 - CREDIT & COLLECTIONS Requests:B plovee:MARILYN MAYEA - 00312693 Header Salary Other Con Calculated Compensation ocated Compe Nos Dec Jan Feb Mar 2,789.62 2,789,62 4,184.43 2,789.62 2,789.62 2,789.6 Salary Amount Current Year Salary Salary Amount 2,789.62 2,789.62 4,184.43 2,789.62 2,789.62 2,789.62 Merit Step Increase Salary Amount 111.60 111.60 111.60 111.6 Cost of Living Adjustment Salary Amount 29.01 29.01 Total Salary Total Compense 2.930.23 2.930.23 2,908,42 2,930,23 4,395.35 2,930.23 HALF STEP (HS) Salary Amount PREMIUM PAY AFSCME F, G & H (3C) Other Compensation Amoun 140.00 140.00 210.00 140.00 140.0 140.00 Flex Benefits Other Compensation Amoun 84.67 84.62 126.92 84.62 84.62 84.6 Health Insurance Rate Other Compensation Amount 1,153.85 1,153.85 1,730.77 1,153.85 1,153.85 1,153.85 Life Insurance Rate 6.14 9.28 6.19 18.69 6,19 Other Compensation Amount 6,19 6.1 Dental Plans 18.69 18.69 18.69 28.04 Other Compensation Amount 18.69 FRS INVESTMENT PLAN - REGULAR (I3) Other Compensation Amount 264.91 266.80 400.20 266.80 266.80 266.80 Social Security Rate 285.53 190.35 190.35 Other Compensation Amount Medicare Rate Other Compensation Amount 44.20 44.52 66.78 44.52 44.52 44.52 1,905.02 Total Other Con Total Compensation 1,905.02 1,905.0 otal Pay Element Total Comp 4,809.82 4,835.25 7,252.87 4,835.25 4,835.25 Select the Allocated Compensation tab and confirm the following: These amounts will be 7 - Budget amounts are reallocated for the year mapped to the operating - FTE is allocated (at the bottom of the form) database (FINSTMT) during the next scheduled data Augenantment:FN06100100 - CREDIT & COLLECTIONS Vers Scenario:Budge map. Requests:Bas -MARTLYN MAYEA - 00312693 Header Salary Other Comp cation Calculated Com Allocated Compensation Allocated Allocated Allocated Allocation Grant Project Activity Percent Budget Amount Allocated Account Allocated Fund Allocated Job Code SG000304 2,789.62 5001100000 - EMPLOYEE REGULAR G5004 - CREDIT & COLLECTION OP. No\_Grant No\_Project No\_Activity 100% MEDICAL BILLING CLERK - 0003 Oct 2,789.62 5001100000 - EMPLOYEE REGULAR G5004 - CREDIT & COLLECTION OP. No\_Grant No\_Project No\_Activity 100% MEDICAL BILLING CLERK - 00030 4,184.43 5001100000 - EMPLOYEE REGULAR G5004 - CREDIT & COLLECTION OP. No\_Grant No\_Project No\_Activity 100% MEDICAL BILLING CLERK - 00030 Dec Jan 2,789.62 5001100000 - EMPLOYEE REGULAR G5004 - CREDIT & COLLECTION OP. No Grant No Project No Activity 100% MEDICAL BILLING CLERK - 00030 2,789.62 5001100000 - EMPLOYEE REGULAR G5004 - CREDIT & COLLECTION OP. No\_Grant No\_Project No\_Activity 100% MEDICAL BILLING CLERK - 0003 Feb 2,789.62 5001100000 - EMPLOYEE REGULAR G5004 - CREDIT & COLLECTION OP. No\_Grant No\_Project No\_Activity 100% MEDICAL BILLING CLERK - 00030 Mar Apr 2,789.62 5001100000 - EMPLOYEE REGULAR G5004 - CREDIT & COLLECTION OP. No\_Grant No\_Project No\_Activity 100% MEDICAL BILLING CLERK - 00030 2,789.62 5001100000 - EMPLOYEE REGULAR G5004 - CREDIT & COLLECTION OP. No\_Grant No\_Project No\_Activity 100% MEDICAL BILLING CLERK - 00030 May 2,789.62 5001100000 - EMPLOYEE REGULAR G5004 - CREDIT & COLLECTION OP. No\_Grant No\_Project No\_Activity 100% MEDICAL BILLING CLERK - 00030 Jun Jul 4,184.43 5001100000 - EMPLOYEE REGULAR G5004 - CREDIT & COLLECTION OP. No Grant No Project No Activity 100% MEDICAL BILLING CLERK - 00030-2,789.62 5001100000 - EMPLOYEE REGULAR G5004 - CREDIT & COLLECTION OP. No\_Grant No\_Project No\_Activity 100% MEDICAL BILLING CLERK - 00030 Aug 2,789.62 5001100000 - EMPLOYEE REGULAR G5004 - CREDIT & COLLECTION OP. No\_Grant No\_Project No\_Activity 100% MEDICAL BILLING CLERK - 00030 FTE\_PE 1.00 Full Time Filled FTE G5004 - CREDIT & COLLECTION OP. No\_Grant No\_Project No\_Activity 100% MEDICAL BILLING CLERK Select the "Manage Positions $\rightarrow$ Single" breadcrumb to return to the 7 Manage Single Position form. Task - Manage Single Position Task Instructions Manage Positions - Single Personnel Details Scenario:Budget Department:FN06100100 - CRED Requests:Base Employee:MARILYN MAYE Salary Other Compensation Allocation Calculated Compensation Allocated Compensation Header

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<b>9</b>			

8	HCM Upda	ou have made a ch ate" column should e is excluded from	d now be mark	ed as "Y	es", indicati		
			sk Instructions				
			Years:FY22				
		POS00003990	Working	▼ →			
				Budget Amount	Excluded from Nightly HCM Update		
		FN06100100 - CREDIT & COLLECTION	S EMPVacancy		Yes		
			MARILYN MAYEA - 00312693	62,833			



	Lesson 8: Add/Delete New Position
Lesson Overview	This lesson will guide users through the steps to add or delete a new position in the budget year. The Add rule will create a generic position record (New Position 1, New Position 2, etc.) and assign it to the EMPVacancy record.
	The steps listed below will navigate the user to the <b>Manage Positions by Department</b> . This is the only form with the Add Position menu.
In this lesson you will learn:	<ul> <li>Navigate to the Manage Single Position task</li> <li>Add or delete a new position</li> <li>Validate the results of the calculation</li> </ul>

### Hyperion Department Personnel End User Training Guide



Step	Action	Notes
1	From the home screen, navigate to the Manage Positions by Department form by going to My Task List → Personnel Management → Manage Personnel → Manage Positions by Department.	
2	Click on the drop-down arrow next to the Department dimension in the point of view (POV) and select a level 0 department. Click the "Go" arrow to save your selection.	
3	Right click on the form and select "New Position ->Add New Position"	
4	In the run time prompt, select / enter the following: ->Select a New Job Code: Select the job code for the new position. This will drive the salary, retirement and premium pay assignment for the new position ->Enter New Position Description: Text description of new position ->Enter New Position Description: Text description of new position ->Select FT / PT: Select FT / PT status. ->Enter FTE: Enter FTE for new position ->Enter Max Headcount: Enter max headcount. Max headcount is multiplied against FTE to determine the cost of the new position ->Select Start Month: Use the member selector to select the budget year start month for the new position Select Launch.	Adding a new position is similar to adding a new job code today. This functionality should be used if a new job code is planned to be added to your department. The new position number is defaulted and is not tied to anything.

	Runtime Prompts - PSTH_RULESET_STATUSCHANGE_Add_Ikew_Position       X         Prompt Text       Yalue         Image: State New Xob Code:       311 CALC ENTRE SPEC - 001188         Image: State New Xob Code:       311 CALC ENTRE SPEC - 001188         Image: State New Xob Code:       311 CALC ENTRE SPEC - 001188         Image: State New Xob Code:       311 CALC ENTRE SPEC - 001188         Image: State New Xob Code:       311 CALC ENTRE SPEC - 001188         Image: State New Xob Code:       311 CALC ENTRE SPEC - 001188         Image: State New Xob Code:       311 CALC ENTRE SPEC - 001188         Image: State New Xob Code:       311 CALC ENTRE SPEC - 001188         Image: State New Xob Code:       311 CALC ENTRE SPEC - 001188         Image: State New Xob Code:       311 CALC ENTRE SPEC - 001188         Image: State New Xob Code:       311 CALC ENTRE SPEC - 001188         Image: State New Xob Code:       311 CALC ENTRE SPEC - 001188         Image: State New Xob Code:       311 CALC ENTRE SPEC - 001188         Image: State New Xob Code:       311 CALC ENTRE SPEC - 001188         Image: State New Xob Code:       311 CALC ENTRE SPEC - 001188         Image: State New Xob Code:       311 CALC ENTRE SPEC - 001188         Image: State New Xob Code:       311 CALC ENTRE SPEC - 001188         Image: State New Xob Code:       311 CALC	
	Launch Cancel	
5	Right click on the new position and select "Personnel Details".	
6	Select the Header tab and confirm the following: ->Full Time / Part Time is what you selected in the run time prompt ->FTE, Standard FTE and Total Vacant FTE's is the value you entered in the run time prompt ->Union is correct for the job code ->Standard hours is correct for the job code ->Standard hours is correct for the job code ->Max Headcount is the value you entered in the run time prompt $\frac{1}{100} \frac{1}{100} \frac{1}{100}$	New positions work just like the vacancy record on existing positions. The salary and other compensation elements are all assigned based on default tables managed by OMB
7	Select the Salary tab and confirm the following: ->The correct salary grade and midpoint step or rate is assigned to the new position ->COLA (if applicable) is assigned to the new position $\frac{tak + temperature}{tak / temperature} = testion to the new position = testion to the selection of the concentration of the conce$	

-	Select the Other Compensation tab and confirm the following:	
8	->The correct premium pay component and retirement element is assigned to	
	the new position	
	->Flex pay, benefits and taxes are assigned to the new position	
	Task - Manage Positions by Department Task Instructions	
	Manage Positions by Department > Personnel Details	
	Contrain-Budget     Appentment-FN06100100 - CREDIT & COLLECTIONS     Requests/Base     Department-FN06100100 - CREDIT & COLLECTIONS	
	Header Salary Other Compensation Allocation Calculated Compensation Allocated Compensation	
	BegBalance Oct Nov FFE FFE Greater Maximum Apply to to Calculation Type Than Value Retirement Taxes Budget Rate Budget Rate	
	PREMILM PAY GSAF (7C)         Monthly         Yes         Yes         Yes         151.6700         151.6700           Flex Benefits         Monthly         0.7400         No         Yes         91.6667         91.6667	
	Health Travance Rate         Monthly         0.7400         1,250,0000         1,250,0000           U/E Insurance Rate         Percent of Salary         0.0021         0.0021	
	Dental Plans         Monthly         0.7400         20.2500         20.2500           FRS INVESTMENT FLAN - REGULAR (3)         Present of Retirement Eligible Earnings         0.0669         0.0669	
	Notification         Point P	
	Select the Allocation tab and confirm the following:	The allocation is
9	->The correct default fund, grant, project and activity was assigned to the	defaulted from the
	new position Task - Planage Positions by Department Task Performance	Department
	Manage Positions by Department > Personnel Details	Allocation Defaults
	Illipserand/Budget         Allipserand/Budget         Allipse	form
	Header Salary Other Compensation Allocated Compensation Allocated Compensation Allocated Grant Allocated Project Allocated Activity Allocated Project Allocated Activity Allocation Percent	
	Allocation 1         COUNT-CENERAL FUED CPERATIONS         No_Grant         No_Project         No_Admity         100%           Allocation 2	
	Market 1	
	Advants 1	
	Total Orea         2001 - 024544, R.1-0 OPARTOZO         Lg. Cant.         No. Street         No. Attomy         100%	
10	Select the Calculated Compensation tab and confirm the following:	
10	Select the Calculated Compensation tab and confirm the following:           ->Calculated amounts are correct	
10	Select the Calculated Compensation tab and confirm the following:         ->Calculated amounts are correct         ->If you created a part time position, confirm that flex pay and benefits are	
10	Select the Calculated Compensation tab and confirm the following: ->Calculated amounts are correct ->If you created a part time position, confirm that flex pay and benefits are calculating correctly	
10	Select the Calculated Compensation tab and confirm the following:         ->Calculated amounts are correct         ->If you created a part time position, confirm that flex pay and benefits are	
10	Select the Calculated Compensation tab and confirm the following: ->Calculated amounts are correct ->If you created a part time position, confirm that flex pay and benefits are calculating correctly	
10	Select the Calculated Compensation tab and confirm the following: ->Calculated amounts are correct ->If you created a part time position, confirm that flex pay and benefits are calculating correctly	
10	Select the Calculated Compensation tab and confirm the following: ->Calculated amounts are correct ->If you created a part time position, confirm that flex pay and benefits are calculating correctly Tak- Manage Positions by Department Tak Instruction Manage Compensation Manage Manage Department Tak Instruction Manage Positions by Department Tak Instruction Manage Department	
10	Select the Calculated Compensation tab and confirm the following: ->Calculated amounts are correct ->If you created a part time position, confirm that flex pay and benefits are calculating correctly Tesk: Hange Positions by Department Tesk Instructors Hade Selery Other Compensation Allocation Calculated Compensation Allocation Calculated Compensation Allocation Calculated Compensation Select the Calculated Compensation and confirm that flex pay and benefits are calculating correctly Tesk: Hange Positions by Department Tesk Instructors Hade Selery Other Compensation Allocation Calculated Compensation Allocation Calculated Compensation Allocation Calculated Compensation Select the Collections of the Select the Collections of the Select the Collections of the Select the	
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10	Select the Calculated Compensation tab and confirm the following: ->Calculated amounts are correct ->If you created a part time position, confirm that flex pay and benefits are calculating correctly	
10	Select the Calculated Compensation tab and confirm the following: ->Calculated amounts are correct ->If you created a part time position, confirm that flex pay and benefits are calculating correctly	
10	Select the Calculated Compensation tab and confirm the following: ->Calculated amounts are correct ->If you created a part time position, confirm that flex pay and benefits are calculating correctly	
10	Select the Calculated Compensation tab and confirm the following: ->Calculated amounts are correct ->If you created a part time position, confirm that flex pay and benefits are calculating correctly Text-Itange Positions by Department Text Instructions Were presented by Department Text Instructions Were presented by Department Text Instructions Were presented by Department Presented Data Select Units Select Sel	
10	Select the Calculated Compensation tab and confirm the following: ->Calculated amounts are correct ->If you created a part time position, confirm that flex pay and benefits are calculating correctly	
	Select the Calculated Compensation tab and confirm the following: ->Calculated amounts are correct ->If you created a part time position, confirm that flex pay and benefits are calculating correctly	These amounts (or
10	Select the Calculated Compensation tab and confirm the following: ->Calculated amounts are correct ->If you created a part time position, confirm that flex pay and benefits are calculating correctly Image Position by Department         Tak - Hange Position by Department         Tak - Hange Position by Department         Tak - Hange Position by Department           Image Position by Department         Tak - Hange Position by Department	These amounts (or cleared amounts)
	Select the Calculated Compensation tab and confirm the following: ->Calculated amounts are correct ->If you created a part time position, confirm that flex pay and benefits are calculating correctly	cleared amounts)
	Select the Calculated Compensation tab and confirm the following: ->Calculated amounts are correct ->If you created a part time position, confirm that flex pay and benefits are calculating correctly	cleared amounts) will be mapped to
	Select the Calculated Compensation tab and confirm the following: ->Calculated amounts are correct ->If you created a part time position, confirm that flex pay and benefits are calculating correctly	cleared amounts) will be mapped to the operating
	Select the Calculated Compensation tab and confirm the following: ->Calculated amounts are correct ->If you created a part time position, confirm that flex pay and benefits are calculating correctly	cleared amounts) will be mapped to the operating database (FINSTMT
	Select the Calculated Compensation tab and confirm the following: ->Calculated amounts are correct ->If you created a part time position, confirm that flex pay and benefits are calculating correctly	cleared amounts) will be mapped to the operating database (FINSTMT during the next
	Select the Calculated Compensation tab and confirm the following: ->Calculated amounts are correct ->If you created a part time position, confirm that flex pay and benefits are calculating correctly	cleared amounts) will be mapped to the operating database (FINSTMT

12       Select the "Manage Positions by Department form.         12       The select the "Manage Positions by Department form.		Task - Manage Positions by Departmen	t Task instructions
12       Select the "Manage Positions by Department Takk Instructions         12       Select the "Manage Positions by Department Takk Instructions         12       Takk 15 Status		Manage Positions by Department > Personne	el Detals
12       Select the "Manage Positions by Department Tak.net Processing Sec. 0018         12       Select the "Manage Positions by Department Tak.net Processing Sec. 0018         12       Select the "Manage Positions by Department Tak.net Processing Sec. 0018         12       Select the "Manage Positions by Department Tak.net Processing Sec. 0018		4	
12       Select the " Manage Positions by Department form.         12       Select the " Manage Positions by Department form.		Scenario:Budget	ポ <sub>y</sub> Department:FN06100100 - CREDIT & COLLECTIONS 題。Wersion:Working
12       Select the "Manage Positions by Department form.         12       Select the "Manage Positions by Department form.			
12       Regist House to Abcated Account       <		Header Salary Other Compensation	Allocation Calculated Compensation Allocated Compensation
12 Select the "Manage Positions by Department Task Instructions 1 10 Control Full The Vacant FTE Control Face Instructions (Figure 10, Figure		Budg	
12       Select the " Manage Positions by Department form.         12       Select the " Manage Positions by Department form.         12       Task List Status		SG001188 Oct	3,403.94 5001100000 - EMPLOYEE REGULAR G1001 - GENERAL FUND OPERATIONS No_Grant No_Project No_Activity 100% 311 CALL CENTER SPEC - 001188
12 Select the "Manage Positions by Department form. 13 14 10		Nov	3,403.94 5001100000 - EMPLOYEE REGULAR G1001 - GENERAL FUND OPERATIONS No_Grant No_Project No_Activity 100% 311 CALL CENTER SPEC - 001188
12       Preprint       3,403.94 500110000 - DPR/OTER REGULAR G1001 - GREAR FIND OPERATIONS No_Great No_Project No_Activity       100% 311 CALL CRITES SPEC - 01188         14       3,403.94 500110000 - DPR/OTER REGULAR G1001 - GREAR FIND OPERATIONS No_Great No_Project No_Activity       100% 311 CALL CRITES SPEC - 01188         15       3,403.94 500110000 - DPR/OTER REGULAR G1001 - GREAR FIND OPERATIONS No_Great No_Project No_Activity       100% 311 CALL CRITES SPEC - 01188         16       16       Spin S0110000 - DPR/OTER REGULAR G1001 - GREAR FIND OPERATIONS No_Great No_Project No_Activity       100% 311 CALL CRITES SPEC - 01188         17       Spin S0110000 - DPR/OTER REGULAR G1001 - GREAR FIND OPERATIONS No_Great No_Project No_Activity       100% 311 CALL CRITES SPEC - 01188         12       See       1.00 Full The Vacant FITE       G1001 - GREAR FIND OPERATIONS No_Great No_Project No_Activity       100% 311 CALL CRITES SPEC - 01188         12       Select the " Manage Positions by Department" breadcrumb to return to the Manage Positions by Department form.         Task - Manage Positions by Department Task Instructors         18       Seconario:Budget       #		Dec	5,105.91 5001100000 - EMPLOYEE REGULAR G1001 - GENERAL FUND OPERATIONS No_Grant No_Project No_Activity 100% 311 CALL CENTER SPEC - 001188
12 Select the "Manage Positions by Department Test Instructions Task List Status Task - Manage Positions by Department Test Instructions Manage Positions By Department Test Instructions Manag		Jan	3,403.94 5001100000 - EMPLOYEE REGULAR G1001 - GENERAL FUND OPERATIONS No_Grant No_Project No_Activity 100% 311 CALL CENTER SPEC - 001188
12       Select the " Manage Positions by Department form.         12       Select the " Manage Positions by Department form.         12       Task List Status         13       Select the " Manage Positions by Department form.		Feb	3,403.94 5001100000 - EMPLOYEE REGULAR G1001 - GENERAL FUND OPERATIONS No_Grant No_Project No_Activity 100% 311 CALL CENTER SPEC - 001188
12 Select the "Manage Positions by Department Task Instructions Manage Positions by Department Personnel Details			
12 Select the "Manage Positions by Department form. <b>Task List Status Task Manage Positions by Department Manage Positions By Department Manage Positions By Department Manage Positions By Department Manage Positio</b>			
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12 Aug 3,493.94 500100000 - EMPLOYEE REGULAR G1001 - GENERAL FUND OPERATIONS No_Grant No_Project No_Activity 100% 311 CALL CENTER SPEC - 001188 THE_PE Sep 1.00 Full Time Vacant FTE G1001 - GENERAL FUND OPERATIONS No_Grant No_Project No_Activity 100% 311 CALL CENTER SPEC - 001188 Select the "Manage Positions by Department" breadcrumb to return to the Manage Positions by Department form. Task List Status Task - Manage Positions by Department Task Instructions Manage Positions by Department Personel Details Manage Positions by Department Task Instructions Manage Positions by Department Personel Details			
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12 Select the "Manage Positions by Department" breadcrumb to return to the Manage Positions by Department form.		St Sep	3/40/34 200100000-BMPLOTER REPORTER (2001-ORDERATIONS NOTIVER NOTWARK NOTWORK) 2012 CHITCHILCHARK 2661-001108
12 Select the "Manage Positions by Department" breadcrumb to return to the Manage Positions by Department form.		FTE PE Seo	1.00 Full Time Vacant FTE G1001-GENERAL FUND OPERATIONS No Grant No Protect No Activity 100% 311 CALL CENTER SPEC - 001188
Manage Positions by Department form.			
Manage Positions by Department form.	12	Select the Manage	e Positions by Department breadcrumb to return to the
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Task - Manage Positions by Department       Task Instructions         Manage Positions by Department > Personnel Details         Image Positions > Personnel Details </th <th></th> <th></th> <th></th>			
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Cenario:Budget  Cenario:Budget Cenario:Budget Cenario:Budget Cenario:Budget Cenario:Budget Cenario:Budget Cenario:Budget Cenario:Budget Cenario:Budget Cenario:Budget Cenario		Manage	Positions by Department > Personnel Details
🖳 Requests:Base		- Charles - Char	
D. Requests:Base			
			Scenario:Budget

### Step Action Notes Right click on the new position record and select "New Position ->Delete New 1 Position". Task - Manage Positions by Department Task Instructions Years:FY22 FN06100100 - CREDIT & COLLECT 🔽 Working -Budget Amount Update Position Status Tra unount of Active New Positi Personnel Details POS00002 Change rull Inne , Change Full Time / Part Time Status Active POS00003 D Move Position Active Inactivate Position POS0000 Add New Position Sync Position with HCM Delete New Position POS00003 Edit In the run time prompt, select / enter the following: This rule will delete 2 the new position ->Select Position: Confirm the new position to delete from the budget. Select Launch. Runtime Prompts - PSTN\_STATUSCHANGE\_Delete\_New\_Position Prompt Text \* Select Position: Value "New Position 3" Ŵn\_ Cancel Confirm that the new position has been deleted from the department. The delete rule 3 cleared the allocated compensation for the new position. The operating database will be updated the next time the scheduled data maps run.

	Lesson 9: Terminate/Reactivate Employee
Lesson Overview	This lesson will guide users through the steps to terminate an employee and then reactivate a terminated employee in the budget year. This status change occurs at the employee level and impacts the vacancy calculation at the position level.
	The steps listed below will navigate the user to the <b>Manage Single Position</b> task, but users can also make this change from <b>Manage Single Employee</b> or <b>Manage</b> <b>Employees by Department</b> .
In this lesson you will learn:	<ul> <li>Navigate to the Manage Single Position task</li> <li>Terminate and reactivate an employee</li> <li>Validate the results of the calculation</li> </ul>

Step	Action	Notes
1	From the home screen, navigate to the Manage Single Position form by going to My Task List → Personnel Management → Manage Personnel → Manage Single Position.	
2	Click on the drop-down arrow next to the Position dimension in the point of view (POV) and select a Position. Click the "Go" arrow to save your selection.	
3	Note the following on the EMPVacancy and employee record: ->The FTE, Vacant FTE and Filled FTE for the EMPVacancy ->The Budget Amounts for the employee and EMPVacancy ->The Budget Amounts for the employee and EMPVacancy Full Time / Part FTE Poston Decorption Full Time / Part FTE Poston Decorption Full Time / Part FTE REP Public 00 100 - CREDIT & COLLECTIONS Full Time / Part FTE Standard FTE Total Filled FTE's Max FTE Max Headcount 1.00 1.00 1.00 1.00 1.00	
4	Right click on the employee record and select "Terminate Employee → Terminate Employee".	



5	In the run time prompt, select / enter the following: ->Select Start Month: Use the member selector to select the budget year start month of the termination. ->Apply Termination Payout: This is defaulted to "Yes", but if a user changes it to "No", termination pay will <b>not</b> be calculated Select Launch. Runtime Prompts - PSTN_RULESET_STATUSCHANGE_Terminate_Employee Prompt Text * 1:Select Start Month: * 1:Apply Termination Payout: Yes	This rule will clear calculated compensation for the employee starting in the selected start month but will apply termination pay in the start month. The rule will also create a vacancy in the position by increasing the Vacant FTE and ultimately the FTE for the vacancy member.
7	Right click on the employee record and select "Personnel Details".         Task - Manage Single Position         Task - Manage Single Position         Task - Manage Single Position         Budget Amount         Nightly HCM         POS00003988         Working         Budget Amount         Nightly HCM         Update         Employee Status         EMFANIE DAVIS         Terminate Employee         Select the Salary tab and confirm the Employee Status changes to         Terminated in the selected start month.         Task - Manage Single Position         Task Instructions         Manage Positions - Single > Personnel Details         Manage Positions - Single > Personnel Details         Manage Single Position         Task Instructions         Manage Positions - Single > Personnel Details         Manage Positions - Single > Personnel Details         Manage Single > Personnel Details         Manage Positions - Single > Personnel Details	
8	Header       Salary       Other Compensation       Allocation       Calculated Compensation       Allocated Compensation         No_PE       BegBalance       YearTotal CY       Oct       Nov         Full Time       Full Time       Full Time       Full Time       Full Time         FTE       1.00       1.00       1.00       1.00         Step       8       9       9       9         Anniversary Date       10/7/20       10/7/21       10/7/21	
	and vacation hours (from the header tab) appear in the selected start month on the termination row.	

	Task - Manage Single Position Task Instructions	
	Manage Positions - Single > Personnel Details	
	Image: Constraints/Budget         MyDepartment-FN06100100 - CREDIT & COLLECTIONS           Image: Constraints/Base         Image: Constraints/Base           Header         Salary         Other Compensation           Allocated Compensation         Allocated Compensation	
	PE         Decision         Second Sec	
9	Select the Calculated Compensation tab and confirm termination pay	These amounts will be
9	and taxes are calculated (and correct) in the termination start month. All other pay elements should be cleared starting in the start month. All other pay elements should be cleared starting in the start month. Task-Manage Single Position Task Instructions Manage Positions - Single > Personnel Details Manage Positions - Single > Details Manage Positions - Detail	mapped to the operating database (FINSTMT) during the next scheduled data map.
	Select the Allocated Compensation tab and confirm termination pay is	
10	allocated correctly, the rest of the allocations end in the selected start month, and the allocated FTE (at the bottom) has been cleared.	
11	Select the "Manage Positions ->Single" breadcrumb to return to the	
11	Manage Single Position form.	
10	Right click on the EMPVacancy record and select "Personnel Details".	
12	Task - Manage Single Position       Task Instructions         Image: Single Position       Temployee	



		Task List S	tatus				
		Task - Manage Single Position Task Instructions					
		Manage Po	ositions - Sir	ngle : Personnel Details			
			ill,Sce	enario:Budget		đ	Department:FN06100100 - CRE
		Requests:Base					Employee:EMFANIE DAVI
		Header	Salary	Other Compensation	Allocation	Calculated Compensation	Allocated Compensation



Step	Action	Notes				
1	Right click on the employee record and select "Terminate Employee $\rightarrow$ Reactivate Employee".					
	Task - Manage Single Position Task Instructions					
	FN06100100 - CREDIT & COLLECTIONS     Budget Amount     Excluded from Nyfity HOM     Employee Status     Emp       EMPFANIE DAVIS - 003107     Personnel Details     emmated     EMFANIE C       Terminate Employee     QTerminate Employee     QTerminate Employee					
	Change Full Time / Part Time Status					
2	In the run time prompt, select / enter the following: ->Select Employee: Confirm the employee to sync	This rule will reactivate the employee and reduce the vacancy.				
	Select Launch.					
	Runtime Prompts - PSTN_RULESET_STATUSCHANGE_Reactivate_Employee	The rule will fail if the				
	Prompt Text Value	vacancy no longer exists				
	* Select Employee:     "EMP00310772"	to reactivate the employee.				
3	Confirm the employee record and vacancy record have been reset to their values before the termination.					
4	Because you only reactivated the employee and did not synchronize the position, the "Exclude Employee from HCM Update" column should still					
	be marked as "Yes", indicating that this change is excluded from the nightly HCM refresh.					
	Task - Manage Single Position Task Instructions					
	Years:FY22					
	POS00003988 V Working V					
	FN06100100 - CREDIT & COLLECTIONS     EMPVacancy     Yes       EMFANIE DAVIS - 00310772     78,409     EMFANIE C DAVIS					



	Lesson 10: Update Accrued Balances
Lesson Overview	This lesson will guide users through the steps to update accrued balances in the budget year. This status change occurs at the employee level, not at the vacancy level.
	The steps listed below will navigate the user to the Manage Single Employee task, but users can also make this change from Manage Employees by Department.
In this lesson you will learn:	<ul> <li>Navigate to the Manage Single Employee task</li> <li>Update accrued balances in the budget year</li> <li>Validate the results of the calculation</li> </ul>

Step	Action	Notes
1	From the home screen, navigate to the Manage Single Employee form by going to My Task List → Personnel Management → Manage Personnel → Manage Single Employee.	
2	Click on the drop-down arrow next to the Employee dimension in the point of view (POV) and select an Employee. Click the "Go" arrow to save your selection. Right click on the employee row and select "Personnel Details".	
3	Task - Manage Single Employee       Task Instructions         Image: Single Employee       Task Instructions         Image: Single Employee       Image: Single Employee         Image: Single Employee<	
4	Ensure that you have selected the "Header" tab. If you scroll to the right you will see the last three columns are: Accrued Vacation Hours, Accrued Sick Hours, and Accrued Holiday Hours.	Make note of the accrued balances listed in the last three columns as you will be adjusting them in the next step.

5	Manage Employees - Single > Personnel Detail	te Accrued Balances" from the <pre>nstructions ls  dbpDepartment:FN06</pre>	
6	Adjust  In the run time prompt, select / enter accrued balances as necessary: ->Enter Accrued Vacation Hours: enter ->Enter Accrued Sick Hours: enter a n ->Enter Accrued Holiday Hours: enter ->Enter Accrued Comp Hours: enter a Select Launch.	er a number of vacation hours umber of sick hours a number of holiday hours number of comp hours	The run time prompt has you enter in the new accrued hour balances and you can leave a prompt blank if a category doesn't have any hours.
7	Once the rule finishes, verify that the columns are the same as what you en	tered in the run time prompt.	If the employee was already terminated, the Other Compensation tab will show the updated hour count and the Calculated Compensation tab will show the updated payout amount.



	Lesson 11: Transfer Employee/Undo Transfer
Lesson Overview	This lesson will guide users through the steps to transfer an employee to a different position and then undo a transfer in the budget year.
	The steps listed below will navigate the user to the <b>Manage Single Position</b> task and <b>Manage Single Employee task,</b> but employee transfers can also be initiated from <b>Manage Employees by Department</b> .
In this lesson you will learn:	<ul> <li>Navigate to the Manage Single Position task</li> <li>Navigate to the Manage Single Employee task</li> <li>Transfer an employee</li> <li>Undo an employee transfer</li> <li>Validate the results of the calculation</li> </ul>

Step	Action	Notes
1	From the home screen, navigate to the Manage Single Position form by going to My Task List ->Personnel Management ->Manage Personnel ->Manage Single Position.	
2	Click on the drop-down arrow next to the Position dimension in the point of view (POV) and select a <b>target position you want to move the employee</b> <b>into</b> . Click the "Go" arrow to save your selection.	
3	The target position must have a vacancy available. If there isn't a vacancy, increase the max headcount on the target position.	Note the target position number and target department number. You will need to enter these values in the Transfer Employee run time prompt
4	Navigate to the Manage Single Employee form under Personnel Management ->Manage Personnel ->Manage Single Employee.	
5	Click on the drop-down arrow next to the Employee dimension in the point of view (POV) and select the employee you'd like to transfer. Click the "Go" arrow to save your selection.	
6	Right click on the employee record you'd like to transfer and select "Transfer Employee".	
----	--	--
7	In the run time prompt, select / enter the following: ->Start Month: Enter the budget year start month for the employee transfer ->Select Target Department: Use the member selector to select the target department from Step 3. You should not need to change this value if you are transferring to a position in the same level 0 department ->Select position to transfer into: Use the member selector to the target position from Step 3 ->Select Employee: Confirm the employee you want to transfer ->Select Position: Leave at Total Positions ->Select Department: Leave at your department user variable	->The transfer rule will go find copy the employee and employee specific attributes into the target position / department. The rule will fail if you try to transfer an employee into a
	Select Launch.	position without a vacancy.
8	Navigate back to the Manage Single Position form (My Task List ->Personnel Management ->Manage Single Position), click on the drop-down arrow next to the Position dimension in the point of view (POV) and select the <b>target</b> <b>position you moved the employee into</b> . Click the "Go" arrow to save your selection.	
9	Confirm the following for the target position: ->The employee you selected in the run time prompt now appears on the form ->The Budget Amount and FTE for the EMPVacancy has been reduced	
10	Right click on the EMPVacancy record in the target position and select "Personnel Details".	



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16	Right click on the employee record that was transferred into the target	
10	position and select "Personnel Details".	
	POS00003969 ▼ Working ▼ ●	
	POS00003989 Vorking Excluded from Nightly HCM	
	FN06100100 - CREDIT & COLLECTIONS Budget Amount Update Employee Name Po	
	EMPVacancy Yes DENISE B POPPS ACCOL DENISE POPPS - 00211982 68,655	
	MARILYN MAYE	
	Compersonnel Detais Terminate Employee	
17	Select the Header tab and confirm the pay anniversary date reflects the first	The pay anniversary
1/	day of the transfer month.	date gets updated
	Manage Postons - Single > Personnel Detals	for the employee in
	Scenaro@udget     Appartment:PH06100100 - CREDIT & COLLECTIONS     COLLECTIONS     Appartment:PH06100100 - CREDIT & COLLECTIONS     Appartment:PH061000 - CREDIT & COLLECTIONS     Ap	the target position
	Full Time Sabor Pay Innaulty Innaulty Stanfard	to the first day of
	Posteco         Description         Employee Name         Time         FTE         Job Code         Union         Grade         Ster         Date         Date         Views         Hours         He           ACCOUNT         LEXX         MARIL/NI         MAYEA         Full Time         1.00         ACCOUNT         CLEXX         5000037         10/1/21         10/6/14         5.00         80.00	the transfer month.
		This could impact
		merit and step
		increase
		calculations on the
		target position.
18	Select the Salary tab and confirm the following:	If the employee is
	->Confirm the Employee Status is "Inactive" for all of the months before the	assigned a range
	start month you selected in the transfer run time prompt	salary grade, there
	->Confirm the correct salary rate (if assigned a range salary grade) or step (if	should be a 5%
	assigned a step grade) appears on the salary grade-budget rate row	increase (assuming
	Science/Laboration         Approximate/Laboration	the increase doesn't
	BegBaince         Oct         Nov         Dec         Jan         Feb         Mar         Apr         May         Jan         Jan           ND_FE         Full Time	put the employee
	FTE         1.00	over the max).
	Store         Pay Essa         Bureedey         Pay Essa         Bureedey           5xep         7         7         7         7         7         7         7	If the employee is
	Nas Stop 10 11.58 ap 11 12.59 12	assigned a step salary grade, the
	Index ten         1.436.66	step should be the
		first step with a
		budget rate higher
		than the current
		salary rate
4.0	Select the Other Compensation tab and confirm the employee's original list of	Other
19	other compensation elements all appear on the form.	Compensation
	Control Contro Control Control Control Control Control Control Control Control Co	elements should
	Header Salay Other Compensation     Allocated Compensation     Allocated Compensation	have been copied
	BegBalance         Oct         Nov         Dec         Jan         Fe           Budget         Graff or Barle         Maxmum         Apply to to         Tan         Fe           Budget         Calculation Type         Tan         Value         Referent Taxes         Budget Rate         Bud	from the source
	HALF STEP (HS)         Step         Than         Value         Referement         Taxes         Budget Rate	position to the
	Paix Benefits         Monthly         0.7400         No         Yes         91.6667         91.6667         91.6667           Termination Pay         Hours         No         Yes	target position
	Health Issuance Rate         Monthly         0.7400         1.250.0000         1.25	
	PRS INVESTMENT PLAN - REGULAR (D)         1.0000         Percent of Returnent: Eigble Eamin.         0.0869         0.0869         0.0869         0.0869           Social Security State         Percent of Taxable Eamings         8.833.6000         0.0623         0.0623         0.0869           Hedicare Rate         Percent of Taxable Eamings         0.0145         0.0145         0.0145	
	Medicare Rate         Percent of Taxable Earnings         0.0145         0.0145         0.0145	

	the target position is shown on the form.	
	Header         Stary         Other Compensation         Allocated Compensation           Allocated Final         Allocated Final         Allocated Final         Allocated Final           Allocated Final         Allocated Gener         Allocated Final         Allocated Final           Allocated Gener         Final         Allocated Final         Allocated Final	
21	Select the Calculated Compensation tab and confirm the employee calculated	
21	compensation starts in the start month and the calculated amounts are	
	correct	
	Image: Mail of the second of the s	
	Bester         Salary         Other Compensation         Allocation         Calculated Compensation           Header         Salary         Other Compensation         Allocated Compensation         Allocated Compensation           Oct         Nov         Dec         Jan         Feb         Har         Apr	
	S6000310         Salary Amount         2,873.32         2,873.32         4,309.98         2,873.32	
	Cost of Lineng Adjustment         Salary Amount.         28.73         28.73         43.10         28.73         28.73         28.73         28.73         28.73           Total Salary         Total Compensation         2,902.05	
	PREMIUM PAY AFSCHE F, 6 & H (3C)         Other Compensation Amount         140.00         140.00         210.00         140.00         140.00         140.00           Fixe Benefits         Other Compensation Amount         84.62         84.62         84.62         84.62         84.62         84.62         84.62         84.62         84.62         125.92         155.85         1,153.85	
	Interactive Mater         Outer Unifermation mature         1,133-00	
22	Select the Allocated Compensation tab and confirm the employee allocated	
22	compensation starts in the start month and an allocated FTE appears for the	
	employee (last row of the form).	
	Important         Important <t< td=""><td></td></t<>	
	Header         Salary         Other Compensation         Allocated Compensation           Budget Amount         Allocated Account         Allocated Andread         Allocated Account         Allocated Fund	
	Dec         66.16         5011120000         HEX A MEDIARE H.         G1001         GENERAL F.R.D.OFERATIO         Is Grant	
	Mar         44.11         S011130000         HEIZA MEDIZARE H.         G1001         GEHERAL RUID OFEANTID         Ing. Grant         Ing. Project         Ing. Activety         100%         ACCOUNT CLERK - 000310           Apr         44.11         S01130000         HMC MEDIZARE H.         G1001         GEHERAL RUID OFEANTID         Ing. Grant         Ing. Project         Ing. Activety         100%         ACCOUNT CLERK - 000310           Mar         44.11         S01130000         HMC MEDIZARE H.         G1001         GEHERAL RUID OFEANTID         Ing. Grant         Ing. Project         Ing. Activety         100%         ACCOUNT CLERK - 000310           Mar         44.11         S01130000         HMC MEDIZARE H.         G1001         GEHERAL RUID OFEANTID.         Ing. Grant         Ing. Project         Ing. Activety         100%         ACCOUNT CLERK - 000310	
	Jun         44.11         5011130000 - HICA HEDICARE H         G1001 - GEHERAL FUND OFEN TIO         No_Start. No_Project. No_Activity         100% ACCOUNT CLEW - 000310           Jul         66.16         5011130000 - HICA HEDICARE H         G1001 - GEHERAL FUND OFEN TIO         No_Grant. No_Project. No_Activity         100% ACCOUNT CLEW - 000310	
	Jam         44.11         9011.20000 - HICA HEDCARE H.         61001 - GERBAR H. BD0 OFBATTD2         No. Gavet No. J-mode TMCA         No. Mode TMCA         House - Mode TMCA	
	Jam         44.11         5011120000 - HICA HEDLKREH.         G1001 - GEHERAL RIND OFERATIO         ING_Grant. Hu_Project. Hu_Activery         100%         ACCOUNT CLERK-000310           Jal         66.16         501110000 - HICA HEDLKREH.         G1001 - GEHERAL RIND OFERATIO         ING_Grant. Hu_Project. Hu_Activery         100%         ACCOUNT CLERK-000310           Aug         64.11         501113000 - HICA HEDLKREH.         G1001 - GEHERAL RIND OFERATIO         ING_Grant. Hu_Project. Hu_Activery         100%         ACCOUNT CLERK-000310           Sep         44.11         501113000 - HICA HEDLKREH.         G1001 - GEHERAL RIND OFERATIO         ING_Grant. Hu_Project. Hu_Activery         100%         ACCOUNT CLERK-000310           Y2         598.42         5011130000 - HICA HEDLKREH.         G1001 - GEHERAL RIND OFERATIO         ING_Grant. Hu_Project. Hu_Activery         100%         ACCOUNT CLERK-000310           Y2         598.42         5011130000 - HICA HEDLKREH.         G1001 - GEHERAL RIND OFERATIO         ING_Grant. Hu_Project. Hu_Activery         100%         ACCOUNT CLERK-000310           Y4         598.00         501130000 - HICA HEDLKREH.         G1001 - GEHERAL RIND OFERATIO         ING_Grant. Hu_Project. Hu_Activery         100%         ACCOUNT CLERK-000310           Y4         599.00         501130000 - HICA HEDLKREH.         G1001 - GEHERAL RIND OFERATIO         ING_Grant. Hu_Project.	
	Jam         44.11         901120000HICA MEDICARE L.         61001 - GERBAR, RIDO OFRATUS.         Houghert. Houghert. Houghert.         10094. ACCOUNT CLERK - MODIDI           Jad         66.16         901120000HICA MEDICARE L.         61001 - GERBAR, RIDO OFRATUS.         Houghert. Houghert.         10094. ACCOUNT CLERK - MODIDI           App         44.11         9011120000HICA MEDICARE L.         61001 - GERBAR, RIDO OFRATUS.         Houghert. Houghert.         10094. ACCOUNT CLERK - MODIDI           540         44.11         9011120000HICA MEDICARE L.         61001 - GERBAR, RIDO OFRATUS.         Houghert. Houghert. Houghert.         10094. ACCOUNT CLERK - MODIDI           720         578.00         9011120000-HICA MEDICARE L.         61001 - GERBAR, RIDO OFRATUS.         Houghert. Houghert. Houghert.         10094. ACCOUNT CLERK - MODIDI           793         584.42         9011120000-HICA MEDICARE L.         61001 - GERBAR, RIDO OFRATUS.         Houghert. Houghert.         10094. ACCOUNT CLERK - MODIDI           793         584.42         9011120000-HICA MEDICARE L.         61001 - GERBAR, RIDO OFRATUS.         Houghert. Houghert.         10094. ACCOUNT CLERK - MODIDI           794         596.40         9011120000-HICA MEDICARE L.         61001 - GERBAR, RIDO OFRATUS.         Houghert. Houghert.         10094. ACCOUNT CLERK - MODIDI           795         596.21         9011120000-HICA MEDICARE L. <td></td>	
23	Select the "Manage Positions ->Single" breadcrumb to return to the Manage	
23	set       44.11       5011/2000 - HEX A HED/XHF 1, 100 - GEBAAL TWO OFBATTD ING. Set IL: Typest III, Active J       1004 A ACCOUNT CLERK - 000310         set       44.11       5011/2000 - HEX A HED/XHF 1, 1001 - GEBBAAL TWO OFBATTD ING. Set IL: Typest III, Active J       1004 A ACCOUNT CLERK - 000310         set       44.11       5011/2000 - HEX A HED/XHF 1, 1001 - GEBBAAL TWO OFBATTD ING. Set IL: Typest III, Active J       1004 A ACCOUNT CLERK - 000310         set       44.11       5011/2000 - HEX A HED/XHF 1, 1001 - GEBBAAL TWO OFBATTD ING. Set IL: Typest III, Active J       1004 A ACCOUNT CLERK - 000310         set       44.11       5011/2000 - HEX A HED/XHF 1, 1001 - GEBBAAL TWO OFBATTD ING. Set IL: Typest III, Active J       1004 A ACCOUNT CLERK - 000310         set       44.11       5011/2000 - HEX A HED/XHF 1, 1001 - GEBBAAL TWO OFBATTD ING. Set IL: Typest III, Active J       1004 A ACCOUNT CLERK - 000310         set       5964.22       5011/2000 - HEX A HED/XHF 1, 1001 - GEBBAAL TWO OFBATTD ING. Set IL: Typest III, Active J       1004 A ACCOUNT CLERK - 000310         set       602.21       5011/2000 - HEX A HED/XHF 1, 1001 - GEBBAAL TWO OFBATTD ING. Set IL: Typest IIII, Active J       1004 ACCOUNT CLERK - 000310         set       602.21       5011/2000 - HEX A HED/XHF 1, 1001 - GEBBAAL TWO OFBATTD ING. Set IL: Typest IIII, Active J       1004 ACCOUNT CLERK - 000310         set       602.21       5011/2000 - HEX A HED/XHF 1, 1001 - GEBBAAL TWO OFBATTD ING. Set IL: Typest IIIIIIIIIIIIIIIII	
23	Select the "Manage Positions>Single" breadcrumb to return to the Manage Single Position form.	
23	Select the "Manage Positions>Single" breadcrumb to return to the Manage Single Position form.	
23	Select the "Manage Positions ->Single" breadcrumb to return to the Manage Single Position form. Select the "Manage Positions ->Single" breadcrumb to return to the Manage Single Position form.	
23	Select the "Manage Positions ->Single" breadcrumb to return to the Manage Single Si	
23	Select the "Manage Positions ->Single" breadcrumb to return to the Manage Single Position form.	
23	Select the "Manage Positions ->Single" breadcrumb to return to the Manage Single Position form. Select the "Manage Positions ->Single "breadcrumb for to the the pret to the pret to the pret to the the pre	
23	Select the "Manage Positions ->Single" breadcrumb to return to the Manage Single Position form.Select the "Manage Positions ->Single breadcrumb to return to the Manage Single Position form.Because you have made a change to the target position-	If you need to sync
	Select the "Manage Positions ->Single" breadcrumb to return to the Manage         Single Position form.         Image: Single Position f	a target position
	Select the "Manage Positions ->Single" breadcrumb to return to the Manage Single Position form.Select the "Manage Positions ->Single breadcrumb to return to the Manage Single Position form.Because you have made a change to the target position-	a target position with a transferred
	Select the "Manage Positions ->Single" breadcrumb to return to the Manage         Single Position form.         Image: Single Position f	a target position with a transferred employee, make
	Select the "Manage Positions ->Single" breadcrumb to return to the Manage         Single Position form.         Image: Single Position f	a target position with a transferred employee, make sure you sync the
	Select the "Manage Positions ->Single" breadcrumb to return to the Manage         Single Position form.         Image: Single Position f	a target position with a transferred employee, make



25	Click on the drop-down arrow next the Position dimension in the point of view and select the <b>source position for the transferred employee</b> . Click the "Go" arrow to save your Position selection.	Even if you transfer an employee starting at the beginning of the budget year, their source record will still display but will not have any calculated compensation.
26	Right click on the EMPVacancy record in the source position and select "Personnel Details" Task - Manage Single Position Task Instructions Poso0003990 Verses:FY22 Poso0003990 Verses:FY22 Poso0003990 Verses:FY22 Rudget Amount Rudget Amount Se. 164 Yes Rudget Amount Se. 164 Yes Rudget Amount Rudget Amount Se. 164 Yes Rudget Amount Se. 164 Yes Rudget Amount Se. 164 Yes Rudget Amount Rudget Amount Se. 164 Yes Rudget Amount Se. 16	
27	Select the Salary tab and confirm the vacancy FTE (FTE row) has been increased starting in the start month you selected in the transfer run time prompt.	
28	Select the Calculated Compensation tab and confirm the vacancy calculated compensation has been increased starting in the start month you selected in the transfer run time prompt.	
29	Select the Allocated Compensation tab and confirm the vacancy allocated compensation has been increased starting in the start month you selected in the transfer run time prompt.	

	Image: Construct-State         Mg/Department-SR065100100 - CREDIT & COLLECTIONS         Image: Construct-State         Image: Construct-State           Recent/State         Employee-SMPV2.dary         Image: Construct-State
	Header Salary Other Compensation Allocation Calculated Compensation Allocated Compensation
	Budget Amount         Allocated Account         Allocated Fund         Grant         Project         Activity         Percent         Allocated Job Code           SG000304         Oct         2,554.48         5001100000 - EMPLOYEE REGULAR         GS004 - OFEDIT & COLLECTION 0 No, Srant: No, Project: No, Activity         100%         MEDICIAL BILLING CLERK - 0003
	Nov         2,594.48         5003100000 - EMPLOYEE REGULAR         GS0604 - GEDITA COLLECTION O         No. Fanit         No. / More:         <
	Feb         2,594.48         5001100000 - EMPLOYEE REGULAR GS004 - COULT RACULECTION 0.         No_Small         No_Project         No_Project         No_No         No
	Apr         2,594.48         5001100000         EMPLOYEE REGULAR         GS004 - CREDIT & COLLECTION 0         NoProject. NoActivity         100%         MEDICAL BILING CLERK - 0003           Nay         2,594.48         5001100000         EMPLOYEE REGULAR         GS004 - CREDIT & COLLECTION 0         NoProject. NoActivity         100%         MEDICAL BILING CLERK - 0003
	Jun         2,594.48         5001100000 - EMPLOYEE REGULAR         GS004 - OREDIT & COLLECTION 0         No_Grant:         No_Project:         No_Activity         100%         MEDICAL BILLING CLERK - 0003
30	Confirm there is an allocated FTE for the vacancy (would be at the bottom
	row on the form)
	Image: Construit Subject Construit = Constr
	Header Salary Other Compensation Allocation Calculated Compensation Allocated Compensation Allocated Alloc
	Budget Amount         Ablcated Account         Ablcated Account         Project         Active         Perviewt         Ablcated Job Code           Dec         6.04-05 03110000 - HUL-MOREVARE HL. GEGON - GEOLTAR COLLECTION O. No. Exercit No. December 3-Activet y         TeleRALA BLIAB CEGARE-NO.3.         TeleRALA BLIAB CEGARE-NO.3.
	Jan         40.03         5011130000 - MICA MEDICARE M.         65004 - CREDIT & COLLECTION 0.         IncGent. IncProject. NoActivity         100%         HEDICAL BLLEG GERK - 0003           Feb         40.03         5011130000 - MICA MEDICARE M.         65004 - CREDIT & COLLECTION 0.         IncGent. IncProject. NoActivity         100%         MEDICAL BLLEG GERK - 0003           Mar         40.03         5011130000 - MICA MEDICARE M.         65004 - CREDIT & COLLECTION 0.         IncGent. IncProject. NoActivity         100%         MEDICAL BLLEG GERK - 0003           Mar         40.03         5011130000 - MICA MEDICARE M.         GENTA & COLLECTION 0.         IncGent. IncProject. NoActivity         100%         MEDICAL BLLEG GERK - 0003
	Apr         40.03         5011130000 - MICA MEDICARE H.         65004 - CREDIT & COLLECTION O.         No. Grant No. Project No. Activity         100% MEDICAL BILLING CAEK - 0003           May         40.03         5011130000 - MICA MEDICARE H.         65004 - CREDIT & COLLECTION O.         No. Grant No. Project No. Activity         100% MEDICAL BILLING CAEK - 0003
	Jun         40.03 5011130000 - MICA MEDICARE H (5504 - CREDIT & COLLECTION O NoGrant NoProject NoActivity         100% MEDICAL BILLING CLERK - 0003           Jul         60.04 5011130000 - MICA MEDICARE H (5504 - CREDIT & COLLECTION O NoGrant No_Project No_Activity         100% MEDICAL BILLING CLERK - 0003
	Aug         40.03         5011130000 - MICA MEDIARE M.         65004 - CREDIT& COLLECTION 0 Ilo_Gent. Ho_Project. No_Activity         100%         HEDICAL BILLING GLERK - 0003           \$ep         40.03         5011130000 - MICA MEDICARE M.         65004 - CREDIT& COLLECTION 0 Ilo_Gent. Ho_Project. No_Activity         100%         HEDICAL BILLING GLERK - 0003           Y12         552.88         501113000 - MICA MEDICARE M.         65004 - CREDIT& COLLECTION 0 Ilo_Gent. Ho_Project. No_Activity         100%         HEDICAL BILLING GLERK - 0003
	Y12         S25.28         S011330000 - MICA MERCIAREE H.         GS04 - CREDIT & COLLECTION 0.         IncGrant 10project 10Activy         100%         MEDICAL BILLING GLERK - 0003           Y13         S30.27         S01130000-MICA MEDICAREE H.         GS04 - CREDIT & COLLECTION 0.         IncGrant 10project 10Activy         100%         MEDICAL BILLING GLERK - 0003           Y14         S153.31         S0113000 - MICA MEDICAREE H.         GS014 - CREDIT & COLLECTION 0.         IncGrant 10project 10Activy         100%         MEDICAL BILLING GLERK - 0003
	VS         540:40         501113000 <sup>1</sup> HIGA MEDICARE H.         GSOM - CREDIT & COLLECTION O.         Ing. Grant.         Ing. Medical. BILLING GLERK - 0003           FTE_PE         Sep         1.00         Fill Time Vacant FTE         GSOM - CREDIT & COLLECTION O.         Ing. Grant.         Ing. Medical. BILLING GLERK - 0003
	Select the "Manage Decitions" Single" breaderumb to return to the Manage
31	Select the "Manage Positions ->Single" breadcrumb to return to the Manage
	Single Position form.
	Manage Postcons - Single > Personnel Details
	Image: Contained Budget         Multiple partment:PN08100100 - CREDIT & COLLECTIONS         Image: Collection State           Requests:Base         Request:Base         Request:Reversion State         Request:Reversion State
	Header Salary Other Compensation Allocation Calculated Compensation Allocated Compensation Allocated Alloc
	Budget Amount         Allocated Fund         Grant         Project         Activity         Percent         Allocated Job Code           SG000304         Oct         2,594.48         5001100000 - EMPLOYEE REGULAR         GS004 - CREDIT & COLLECTION O.         No_Credit No_Project         No_Activity         100%         MEDICAL BILLING CLERK - 0003
	Nev         2,5954.45         SOULIDIODO - EMPLOYCE REGULAR 65004 - CREDIT & ACULECTION O         No., Grant No., Protect No., Activery         100%         MEDICAL BILLING CLEM-10003           Dec         3,891.72         5001100000 - EMPLOYEE REGULAR 65004 - CREDIT & COLLECTION O         No., Grant No., Protect No., Activery         100%         MEDICAL BILLING CLEM-10003           Jan         2,5944.45         500110000 - EMPLOYEE REGULAR 65004 - CREDIT & COLLECTION O         No., Grant No., Protect No., Activery         100%         MEDICAL BILLING CLEM-10003
	2,254.48 5001100000 FBMC01ER REGULAR G5004 - OREDT & COLLECTION 0. IN 0. Grant IN 0. Project INACMMY 100% REDICAL BILLING CERK - 0003      Km 2,554.48 5001100000 FBMC01ER REGULAR G5004 - OREDT & COLLECTION 0. IN 0. Grant IN 0. Project IN 0. Activity 100% REDICAL BILLING CERK - 0003      Km 2,554.48 500110000 FBMC01ER REGULAR CERT & COLLECTION 0. IN 0. Grant IN 0. Project IN 0. Activity 100% REDICAL BILLING CERK - 0003
	Arr 2 594.48 5001100000 - EMPLOYFE BEGULAR (55004 - CREDIT & COLLECTION O No Grant No Protect No Activity 100% MEDICAL BLUING CLERK - 0003
32	Right click on the employee record that was transferred from the source
	position and select "Personnel Details".
	Task - Manage Single Position     Task Instructions
	POS00003990 Vorking V
	Excluded from Nahthy HCM
	Budget Amount Update Employee Stat
	EMPVacancy 58.164 Yes Active
	MARILY MAY CALL DOUBLOOK
	Terminate Employee
33	Select the Salary tab and confirm the Employee Status is "Transferred" for all
55	of the months starting at start month you selected in the transfer run time
	prompt.
	A
	Efficiency:         Alphantmetriking (SUBIO - OBERT & COLLECTIONS         Efficiency: SUBIO         Operation         Supervision         Supervision </th
	Bugglourse         Year Total (Y)         Autor         Non         Non         Eds         Mar         Autor         Mar           No_FE         Employee Status         Transferred         Active         Transferred         Tr
	Exployer subset in labeleter visit inducetive inducetinducetive inducetive in
	Step         7         7         8
	Normalization         Pay Basis         Benveloy         Environ
	Max Step 10 1. Step 11 1. 2. Step 12
	L2 Seep 12 L3 Seep 13

34	Select the Calculated Compensation tab and confirm the employee calculated								
54	compensation is cleared starting in the start month and the calculated								
	amounts are correct.								
	Manage Positions - Single > Personnel Details								
	Scenario:Budget     Appepartment:FN06100100 - CREDIT & COLLECTIONS								
	Requests:Base         Calculated Compensation           Header         Salary         Other Compensation         Allocated Compensation								
	There are no valid rows of data for this form.								
	No data to display								
35	Select the Allocated Compensation tab and confirm the employee allocated								
	compensation is cleared starting in the start month and no allocated FTE								
	appears for the employee (would be on the bottom row).								
	Manage Positions - Single > Personnel Details								
	Scenario:Budget         #uppartment:FN06100100 - CREDIT & COLLECTIONS         #uppartment:FN06100100 - CREDIT & COLLECTIONS           Requests:Base         Requests:Base         Requests:Base         Requests:Base								
	Header Salary Other Compensation Allocation Calculated Compensation Allocated Compensation								
	There are no valid rows of data for this form.								
	No data to display								
36	Select the "Manage Positions ->Single" breadcrumb to return to the manage								
	form.								
	Task - Manage Single Position Task Instructions           Manage Position - Single > Personnel Detals								
	Image: Comparison of the second sec								
	Header         Salary         Other Compensation         Allocated Compensation         Allocated Compensation           There are no valid rows of data for this form.         There are no valid rows of data for this form.         Allocated Compensation         Allocated Compensation								
	No data to display								
	No data to ospay								
37	Because you have made a change to the source positionthe "Exclude from								
	HCM Update" column should now be marked as "Yes", indicating that this								
	change is excluded from the nightly HCM refresh.								



Step	Action	Notes
1	Navigate to the Manage Single Employee form under Personnel Management ->Manage Personnel ->Manage Single Employee.	
2	Click on the drop-down arrow next to the Employee dimension in the point of view (POV) and select the <b>employee number you transferred in previously</b> . Click the "Go" arrow to save your selection.	
3	Right click on the position record you want to undo and select "Undo Transfer Employee".	
4	In the run time prompt, select / enter the following: ->Original Employee Dept: If the original position resides in a different department, select that department value in this prompt ->Select position to transfer into: Use the member selector or type in the original position number Select Employee: Confirm this is the employee number for the employee to undo ->Select Department: Leave to your user variable ->Select Position: Leave at Total Positions Select Launch.	The undo transfer rule will place the employee back in their original position and copy their employee specific attributes into the position.



	Lesson 12: Change Salary ->Step
Lesson Overview	This lesson will guide users through the steps to change the step assigned to a vacancy or employee on a step salary grade in the budget year. This status change is specific to a single employee or vacancy record.
	The steps listed below will navigate the user to the <b>Manage Single Position</b> task, but users can also make this change from any of the manage position or employee forms.
In this lesson you will learn:	<ul> <li>Navigate to the Personnel Details composite form</li> <li>Change the step assigned to an employee or vacancy</li> <li>Validate the results of the calculation</li> </ul>

Step	Action	Notes
1	From the home screen, navigate to the Manage Single Position form by going to My Task List ->Personnel Management ->Manage Personnel ->Manage Single Position.	
2	Click on the drop-down arrow next to the Position dimension in the point of view (POV) and select a <b>Step Grade</b> Position with a <b>Vacancy</b> . Click the "Go" arrow to save your selection.	You can also change the step assigned to an existing employee
3	Right click on the vacancy record and select "Personnel Details".	
4	Select the Calculated Compensation tab and note the calculated salary amount for the salary grade.	
5	Select the Salary tab. Then right click on the salary grade and select "Change Salary ->Step Grade". Image Single Position         Tesk - Hanage Single Position         Tesk Instructions           Image Position         Tesk - Hanage Single Position         Tesk Instructions           Image Position         Tesk - Hanage Single Position         Tesk Instructions           Image Position         Tesk - Hanage Single Position         Tesk Instructions           Image Positions - Single > Personnel Details         Image Position - Calculated Compensation         Alccatoric Calculated Compensation           Image Positions - Single > Deter Compensation         Alccatoric Calculated Compensation         Alccated Compensation           Image Positions - Single > Deter Compensation         Alccated Compensation         Alccated Compensation           Image Positions - Single > Deter Compensation         Image Position - Calculated Compensation         Image Position - Calculated Compensation           Image Positions - Single > Deter Compensation         Image Position - Calculated Compensation         Image Position - Calculated Compensation           Image Positions - Single > Deter Compensation         Image Position - Calculated Compensation         Image Position - Calculated Compensation           Image Positions - Single > Deter Compensation         Image Position - Calculated Compensation         Image Position - Calculated Compensation - Calculated Compensation - Calculated Compensation - Calculated Compensation - Calculated Compensatio	



6	In the run time prompt, select / enter the following: ->New step for the vacancy record. Select Launch.	If running this rule for an employee, the step selected should be the employee's step going into the budget year The rule will fail if you select a step
		outside of the job codes step range
7	Confirm the budget rate amount has been updated based on the step you selected in the prompt.	
	Max Step         10           L15 Step         11	
8	Select the Calculated Compensation tab and confirm the calculated salary amount for the salary grade that has been updated.	
9	Select the "Manage Positions ->Single" breadcrumb to return to the Manage Single Position form.	
10	Because you have made a change to the positionthe "Exclude from HCM Update" column should now be marked as "Yes", indicating that this change is excluded from the nightly HCM refresh.	

	Lesson 13: Change Salary ->Range
Lesson Overview	This lesson will guide users through the steps to change the salary rate assigned to a vacancy or employee on a range salary grade in the budget year. This status change is specific to a single employee or vacancy record.
	The steps listed below will navigate the user to the <b>Manage Single Position</b> task, but users can also make this change from any of the manage position or employee forms.
In this lesson you will learn:	<ul> <li>Navigate to the Personnel Details composite form</li> <li>Change the salary rate assigned to a vacancy or employee on a range salary grade</li> <li>Validate the results of the calculation</li> </ul>

Step	Action								Notes	
1	From the home screen, navigate to the Manage Single Position form by going to My Task List ->Personnel Management ->Manage Personnel ->Manage Single Position.									
			× 1 1							
2	Click on the drop-down arrow next to the Position dimension in the point of view (POV) and select a <b>Range Salary Grade</b> Position with a <b>Vacancy</b> . Click the "Go" arrow to save your selection.								You can also change the range salary rate assigned to an existing employee	
3	Right click on the vacancy Task - Manage Single Po			t "Pers	onnel	Detail	s".	]		
		WYears:F	=Y22		▼ €					
	POS00003983									
		CRIST	IN, Termin Chang Chang Chang	e Max Heado	Part Time Sta					
4	Select the Calculated Cor amount for the salary gra		tab an	id note	e the ca	alculat	ed sala	ary		
	Task - Hanage Single Position         Task           Manage Positions - Single > Personnel Det         Image Position - Single > Personnel Det									
	Scenario:Budget     Salary     Other Compensatio	n Allocation Calculated Con	5	t:FN06100100 - CREE		Jan	Feb			
	SG000355 Current Year Salary									
	Cost of Living Adjustment Furlough Deduction Total Salary PREMUM PAY NON BARGAINING (J.C.	Salary Amount Salary Amount Total Compensation Other Compensation Amount	67.19 -282.75 6,503.26 140.00	67.19 -282.75 6,503.26 140.00	100.78 -282.75 9,896.26 210.00	67.19 -282.75 6,503.26 140.00	67.19 -282.75 6,503.26 140.00			
	Fiex Benefits Health Insurance Rate Life Insurance Rate Dental Prevs	Other Compensation Amount Other Compensation Amount Other Compensation Amount	84.62 1,153.85 13.73 18.69	84.62 1,153.85 13.73 18.69	126.92 1,730.77 20.89 28.04	84.62 1,153.85 13.73 18.69	84.62 1,153.85 13.73 18.69			
	Dental Mans PRS TIVESTMENT PLAN - REGULAR () Social Security Rate Medicare Rate Total Other Compensation Total Pay Element	Other Compensation Amount Other Compensation Amount Other Compensation Amount Other Compensation Amount Total Compensation Total Compensation	18.69 577.30 411.88 96.33 2,496.39 8,999.65	18.69 577.30 411.88 96.33 2,496.39 8,999.65	28.04 878.23 626.59 146.54 3,767.99 13,664.25	18.69 577.30 411.88 96.33 2,496.39 8,999.65	18.69 577.30 411.88 96.33 2,496.39 8,999.65			
	1010e Korgersaton 0,777.03 0,777.03 13,007.13 8,997.03 8,997.03									

#### Select the Salary tab. Then right click on the salary grade and select "Change 5 Salary ->Range Grade". Scenario:Budge de De Requests:Base Salary Other Compensation Allocation Calculated Compensation A YearTotal C Adjusted Full Time / Part Time 1.00 FTE Max Headcount 1.00 Standard FTE 1.00 Pay Basi 3.359.41 3.359 Adjus If running this rule In the run time prompt, select / enter the following: 6 for an employee, ->New biweekly rate. the salary rate entered should be Select Launch. the employee's Runtime Prompts - PSTN\_RULESET\_STATUSCHANGE\_Change\_Salary\_Range salary rate going Prompt Text \* 1:Enter Budget Year Starting Biweekly Salary: Value into the budget year 4000 The rule will fail if vou enter a biweekly amount less than the minimum or greater Launch Cancel than the maximum Confirm the budget rate amount has been updated based on the rate you 7 entered in the run time prompt. Scenario:Budget ADepartment:FN06100100 - CREDIT & COLLECTIO Requests:Base Employee:EMPVacancy Salary Other Compensation Allocation Calculated Compens ation All earTotal CY Adjusted BegBalance Oct Nos No PE Full Time / Part Time Full Time Full Time 1.00 1.00 1.00 FTE Max Headcount 1.00 2.00 2.00 1.00 Standard FTE 1.00 1.00 Pay Basis Budget Rate 4,000.00 4,000.0 Budget Rate A 104,000.00 104,000.00 Cost of Living nt Budget Rate 0.01 0.01 Budget Rate Annualize 1,040.00 1,040.00 Furlough Deduction Budget Rate 6.6667 6.6663 Budget Rate -4,040.0000 -4,040.0000 Select the Calculated Compensation tab and confirm the calculated salary 8 amount for the salary grade that has been updated.

### Hyperion Department Personnel End User Training Guide

Header Salary Oth	er Compensation Allocation Calculated Com	pensation Alloca	ted Compensation				
	E Contraction of the second se	Oct	Nov	Dec	Jan	Feb	Mar
SG000355	Salary Amount	8,000.00	8,000.00	12,000.00	8,000.00	8,000.00	8,000.00
Current Year Salary	Salary Amount	8,000.00	8,000.00	12,000.00	8,000.00	8,000.00	8,000.00
Cost of Living Adjustm	ent Salary Amount	80.00	80.00	120.00	80.00	80.00	80.00
Furlough Deduction	Salary Amount	-336.67	-336.67	-336.67	-336.67	-336.67	-336.67
Total Salary	Total Compensation	7,743.33	7,743.33	11,783.33	7,743.33	7,743.33	7,743.33
PREMIUM PAY NON BA	RGAINING (LC) Other Compensation Amount	140.00	140.00	210.00	140.00	140.00	140.00
Flex Benefits	Other Compensation Amount	84.62	84.62	126.92	84.62	84.62	84.62
Health Insurance Rate	Other Compensation Amount	1,153.85	1,153.85	1,730.77	1,153.85	1,153.85	1,153.85
Life Insurance Rate	Other Compensation Amount	16.35	16.35	24.88	16.35	16.35	16.35
Dental Plans	Other Compensation Amount	18.69	18.69	28.04	18.69	18.69	18.69
FRS INVESTMENT PLAN	N - REGULAR (I3) Other Compensation Amount	685.06	685.06	1,042.22	685.06	685.06	685.06
Social Security Rate	Other Compensation Amount	488.77	488.77	743.59	488.77	488.77	488.77
Medicare Rate	Other Compensation Amount	114.31	114.31	173.90	114.31	114.31	114.31
Total Other Compensa	tion Total Compensation	2,701.64	2,701.64	4,080.32	2,701.64	2,701.64	2,701.64
Total Pay Element	Total Compensation	10,444.97	10,444.97	15,863.65	10,444.97	10,444.97	10,444.97
Single Position							
Task - Ma	anage Single Position Task I	nstructions					
Manage F	Positions - Single > Personnel Deta	ils					
	Scenario:Budget				A Departme	ent:FN061001	00 - CR
	Requests:Base					. Employe	- EMDV
Heade	r Salary Other Compensation	n Allocation	Calculate	ed Compens	ation Alloc	ated Compen	sation
Because you ha	ive made a chang	ge to th	e posit	ionth	e "Excl	ude fro	om HO
•	-		•				
Update" colum	n should now be	marke	d as "Y	es", inc	licating	; that tl	nis ch
•							
excluded from	the nightly HCM	refresh	l <b>.</b>				
	5 1						

	Lesson 14: Add/Delete Pay Component
Lesson Overview	This lesson will guide users through the steps to add a pay component or delete a pay component assigned to a vacancy or employee in the budget year. Adding and deleting pay components is specific to a single employee or vacancy record.
	The steps listed below will navigate the user to the <b>Manage Single Position</b> task, but users can also make this change from any of the manage position or employee forms.
In this lesson you will learn:	<ul> <li>Navigate to the Personnel Details composite form</li> <li>Add and delete a pay component assigned to an employee or vacancy</li> <li>Validate the results of the calculation</li> </ul>

Step	Action	Notes
1	From the home screen, navigate to the Manage Single Position form by going to My Task List → Personnel Management → Manage Personnel → Manage Single Position.	
2	Click on the drop-down arrow next to the Position dimension in the point of view (POV) and select a Position. Click the "Go" arrow to save your selection.	If you selected a part time position, you'll be able to add pay components, but the pay component will not calculate (exception: part time bus operators)
3	Right click on the employee record and select "Personnel Details".	Users can also add pay components (excluding premium pay components) to vacancies. Premium pay is assigned to vacancies in Hyperion from a global table managed by OMB
4	Select the Other Compensation tab, then right click on the data form and select "Pay Component ->Add Pay Component".	





Step		
	Action	Notes
1	Select the Other Compensation tab, then right click on the pay component	
_ <b>1</b>	you just added and select "Pay Component ->Delete Pay Component".	
	Task - Manage Single Position Task Instructions	
	Manage Positions - Single > Personnel Details	
	ByDepartment:FN06100100 - Cl	
	Header Salary Other Compensation Allocation Calculated Compensation	
	BegBalance	
	Budget FTE Greater Ma	
	Rate Calculation Type Than V	
	PREMILIM PAY NON BARC Pay Component Executive Benefits	
	Longevity Bonus  Update Retirement  Flex Benefits  0.7400	
	Health Insurance Rate Adjust Monthly 0.7400	
	Life Insurance Rate Comments Percent of Salary Dental Plans and Monthly 0.7400	
	In the run time prompt, select / enter the following:	The pay component
2		you delete will
	->Select Pay Component: Confirm the pay component to delete	apply to the entire
		budget year
	Select Launch.	
	Runtime Prompts - PSTN_RULESET_STATUSCHANGE_Delete_Pay_Component ×	
	Prompt Text Value	
	12* * 1:Select Pay Component: "PEXN"	
	Launch Cancel	
	Confirm the new component no longer appears on the form	
2	Confirm the pay component no longer appears on the form	
3		
	Select the Calculated Compensation tab and confirm the pay component is no	
3	Select the Calculated Compensation tab and confirm the pay component is no	
	Select the Calculated Compensation tab and confirm the pay component is no longer being calculated.	
	Select the Calculated Compensation tab and confirm the pay component is no longer being calculated.	
	Select the Calculated Compensation tab and confirm the pay component is no longer being calculated.	
	Select the Calculated Compensation tab and confirm the pay component is no longer being calculated.	
	Select the Calculated Compensation tab and confirm the pay component is no longer being calculated.	
	Select the Calculated Compensation tab and confirm the pay component is no longer being calculated.	
	Select the Calculated Compensation tab and confirm the pay component is no longer being calculated.	
	Select the Calculated Compensation tab and confirm the pay component is no longer being calculated.	
	Select the Calculated Compensation tab and confirm the pay component is no longer being calculated.         Image Single Position Tab Instruction         Image Position Tab Instruction	
	Select the Calculated Compensation tab and confirm the pay component is no longer being calculated.         Image Single Position Tak Instructore         Image Sin	
	Select the Calculated Compensation tab and confirm the pay component is no longer being calculated.	
	Select the Calculated Compensation tab and confirm the pay component is no longer being calculated.         Image Single Position Tab Instruction         Image Positins Instruction         <	



5	Select the "Manage Positions ->Single" breadcrumb to return to the Manage Single Position form.	Users can also delete pay
	Task - Manage Single Position       Task Instructions         Manage Positions - Single       Personnel Details         Manage Positions - Single       Personnel Details         Scenario:Budget       Image Position (Budget)         Requests:Base       Image Position (Budget)         Header       Salary       Other Compensation         Allocation       Calculated Compensation       Allocated Compensation	components (excluding premium pay components) assigned to vacancies. Premium pay is assigned to vacancies in Hyperion from a global table managed by OMB
6	Because you have made a change to the positionthe "Exclude from HCM Update" column should now be marked as "Yes", indicating that this change is excluded from the nightly HCM refresh.	

	Lesson 15: Add/Delete Executive Benefits
Lesson Overview	This lesson will guide users through the steps to add an executive benefit or delete an executive benefit assigned to a vacancy or employee in the budget year. Adding and deleting executive benefits is specific to a single employee or vacancy record.
	The steps listed below will navigate the user to the <b>Manage Single Position</b> task, but users can also make this change from any of the manage position or employee forms.
In this lesson you will learn:	<ul> <li>Navigate to the Personnel Details composite form</li> <li>Add and delete an executive benefit from an employee or position</li> <li>Validate the results of the calculation</li> </ul>

Step	Action	Notes
1	From the home screen, navigate to the Manage Single Position form by going to My Task List → Personnel Management → Manage Personnel → Manage Single Position.	
2	Click on the drop-down arrow next to the Position dimension in the point of view (POV) and select a Position. Click the "Go" arrow to save your selection.	Users can also add pay components assigned to vacancies
3	Right click on the employee record and select "Personnel Details".	
4	Select the Other Compensation tab, then right click on the data form and select Executive Benefits → "Add / Update Executive Benefits".	
5	In the run time prompt, select / enter the following: ->Select Executive Benefit: Use the member selector to select the Executive Benefit to add to the employee in the budget year.	There are two types of executive benefits: single rate and varying rate.



	->Enter A	->Enter Annual Rate (If a Variable Rate Element): enter a rate if applicable, i.e.							Single rate
	If you've selected an executive benefit with a varying rate.								executive benefits
	in you ve selected an executive benefit with a varying rate.								
									have a global rate
		Select Launch.						associated with	
	Jelett Lat								
		Runtime Prompts - P5TII_RULESET_STATUSCHANGE_Add_Update_Executive_Benefits     ×							them. Varying rate
		Prompt Text		Value EB01_E2		Ma.			executive benefits
		1:Enter Annual R	ate (If a Variable Rate Element):						executive benefits
									require you to enter
									an annual rate in
									the prompt.
					Launch	Cancel			
		· · · ·	<u></u>						
6	Confirm t	he executive bene	efit now appe	ears on t	he form	n with it	s correct r	ate.	
0		Manage Positions - Single > Personnel D	etails						
		Scenario:Budget		5	Department:FN0	5100100 - CREDE	L& COLLECTIO		
		Requests:Base			10	:DENISE POPPS -			
		Header Salary Other Comper	sation Allocation Calc	ulated Compensatio	1		00211002		
					BegBalance FTE		4		
			Budget	Coloriation Trees	Greate		Apply to		
			Rate	Calculation Type	Than		letirement Ta		
		HALF STEP (HS) PREMIUM PAY AFSCME F, G & H (3	C) 1.0000 Monthly				Yes Ye		
		Longevity Bonus		f Annual Salary			lo Ye		
		Elex Repefits	Monthly	Arinudi Salary	0.740		io Ye		
		EB01_E2	1.0000 Annual		0.740		lo Ye		
		Health Insurance Rate	Monthly		0.740				
7	Select the	e Calculated Comp	ensation tab	and cor	nfirm th	e execu	itive benef	it	The executive
,	has been	calculated correct	lv.						benefit you added
	_	Task - Manage Single Position Task Instru	·						•
		Manage Positions - Single > Personnel Details							should be applied to
		A							the entire budget
		Scenario:Budget		department:EN	06100100 - CREDIT 8	COLLECTIONS			-
		Requests:Base			e:DENISE POPPS - 0				year
		Header Salary Other Compensation	Allocation Calculated Competence	Allocated (	Compensation				
				Oct	Nov	Dec	Jan		
		SG000310	Salary Amount	3,103.16	3,103.16	4,654.74	3,103.16		
		CY Step Increases	Salary Amount	129.10	129.10	193.65	129.10		
		Current Year Salary     L1 Step Increases	Salary Amount Salary Amount	3,232.26	3,232.26	4,848.39	3,232.26		
		Cost of Living Adjustment	Salary Amount	32.32	32.32	48.48	32.32		
		Total Salary	Total Compensation	3,264.58	3,264.58	4,896.87	3,264.58		
		HALF STEP (HS)	Salary Amount						
		PREMIUM PAY AFSCME F, G & H (3C)	Other Compensation Amount	140.00	140.00	210.00	140.00		
		Longevity Bonus Flex Benefits	Other Compensation Amount Other Compensation Amount	84.62	84.62	126.92	84.62		
		EB01_E2	Other Compensation Amount	1,053.85	1,053.85	1,580.77	1,053.85		
		Health Insurance Rate	Other Compensation Amount	1,153.85	1,153.85	1,730.77	1,153.85		
		Life Insurance Rate	Other Compensation Amount	6.89	6.89	10.34	6.89		
		Dental Plans	Other Compensation Amount	18.69	18.69	28.04	18.69		
		FLORIDA STATE RETIREMENT SYSTEM (21) Social Security Rate	Other Compensation Amount Other Compensation Amount	295.86 276.42	295.86 276.42	443.79 414.63	295.86 276.42		
		Medicare Rate	Other Compensation Amount	64.65	64.65	96.97	64.65		
	1		Total Compensation	3,094.82	3,094.82	4,642.23	3,094.82		
	1	Total Other Compensation							

<b>C</b> 1	- ··	<b>.</b>
Step	Action	Notes
1	Select the Other Compensation tab, then right click on the pay component you just added and select Executive Benefits ->Delete Executive Benefits.	
2	In the run time prompt, select / enter the following: ->Select Executive Benefit: Confirm the Executive Benefit to delete	
	Select Launch.	
3	Confirm the Executive Benefit no longer appears on the form.	
4	Select the Calculated Compensation tab and confirm the executive benefit is no longer being calculated.	The executive benefit you delete should deleted for the entire budget year
	Oct         Nov         Dec         Jan           SG000310         Salary Amount         3,103.16         3,103.16         4,654.74         3,103.16           CY Step Increases         Salary Amount         129.10         129.10         193.65         129.10           4 Current Year Salary         Salary Amount         3,722.26         3,232.26         4,848.39         3,232.26           L1 Step Increases         Salary Amount         32.22         3,232.26         4,848.39         3,232.26           Cost of Living Adjustment         Salary Amount         32.23         32.32         48.48         32.32           Total Salary         Total Compensation Amount         3,264.58         4,896.87         3,264.58           HALF STEP (HS)         Salary Amount         140.00         140.00         140.00           Longerwide Sonta         Other Compensation Amount         140.00         140.00           Longerwide Sonta         Other Compensation Amount         84.62         84.62         126.92         84.62           Health Insurance Rate         Other Compensation Amount         84.62         126.92         84.62         146.56           Health Insurance Rate         Other Compensation Amount         6.89         10.734         6.89	



5	Select the "Manage Positions ->Single" breadcrumb to return to the Manage Single Position form.	Users can also delete executive
	Task - Manage Single Position       Task Instructions         Manage Positions - Single > Personnel Details         Image Positions - Sin	benefits from vacancies
6	Because you have made a change to the positionthe "Exclude from HCM Update" column should now be marked as "Yes", indicating that this change is excluded from the nightly HCM refresh.	



	Lesson 16: Update Retirement
Lesson Overview	This lesson will guide users through the steps to update the retirement element assigned to an employee in the budget year. Updating the retirement element is specific to a single employee record.
	The steps listed below will navigate the user to the <b>Manage Single Position</b> task, but users can also make this change from any of the manage employee forms as well.
In this lesson you will learn:	<ul> <li>Navigate to the Manage Single Position task</li> <li>Update the retirement assigned to an employee</li> <li>Validate the results of the calculation</li> </ul>

Step	Action	Notes
1	From the home screen, navigate to the Manage Single Position form by going to My Task List → Personnel Management → Manage Personnel → Manage Single Position.	
2	Click on the drop-down arrow next to the Position dimension in the point of view (POV) and select a Position. Click the "Go" arrow to save your selection.	
3	Right click on the employee record and select "Personnel Details".	Updating retirement is specific to employees. The logic to assign retirement to vacancies is maintained in a global table managed by OMB
4	Select the Other Compensation tab and note the retirement element curves.	

5	Right click on the assigned retirement element and select "Update	
	Retirement".	
	Task- Hanage Single Position Task Instructions	
	Corrent on Budget     Approximate FRI06 500 000 - CREE	
	Respects/State         Childrey         Conference         Childrey         Conference         Childrey         Conference         Childrey         Childrey<	
	BergSalance Budget Greater Maximum Rate Calculation Type Than Value	
	HULF STEP (HS) Step PREIRUM PAY APSCHE F, G & H (X) 1.0000 Monthly	
	Longentry Borus Percent of Annual Salary Perc Benefits Monthly 0,7400 Health Faurunce Rate Monthly 0,7400	
	Life Insurance Rate Percent of Salary Dental Plans Monthly 0, 7400	
	HOCDIN STATE: Pay Component 0     0000. Percent of Enterment Exploit Earnings     Social Security RE Decutive Revelows     Percent of Taxable Earnings     Revelows Revelow     Percent of Taxable Earnings	
	EST >	
6	In the run time prompt, select / enter the following:	The update
	->Select Retirement Element: Use the member selector to select the	retirement rule will
	retirement element to assign the employee in the budget year.	replace the
	Select Launch	retirement element
	Runtime Prompts - PSTIL RULESET_STATUSCHAINGE_Update_Retirement ×	assigned to the
	Prompt Text Value Value Value RET11	employee with the
		element you select
		in the run time
		prompt.
	Laundi Geneel	
7	Confirm the "old" retirement no longer appears on the form and the element	
	you selected in the run time prompt now appears.	
	Manage Positions - Single > Personnel Details	
	COLLECTIONS	
	M_Requests:Base         M_Employee:DBISE POPPs - 00211992           Header         Salary         Other Compensation         Allocation         Calculated Compensation         Allocated Compensation	
	BegBalance FITE Budget Greater Maximum Apply to to	
	Rate         Calculation Type         Than         Value         Retrement         Taxes           HAUF STEP (HS)         Step         Step         Yes         Yes         Yes	
	PREMIUM PAY AFSCHEF, G & H (3C)         1.0000         Monthly         Yes           Longerity Bours         Percent of Annual Salary         No         Yes           Files. Benefits         Monthly         0.7400         No         Yes	
	nes denetros normany u 7.400 no tes Health flourance Rate Monthly 0.7400 Life Insurance Rate Percent of Salary	
	Dental Plans Monthly 0.7400 FLORIDA STATE RETIREMENT FLANS (1) 1.0000 Percent of Retirement Eligible Earning	
	Social Security Rate         Percent of Taxable Earnings         8,853.6000           Medicare Raite         Percent of Taxable Earnings         8,853.6000	
6	Select the Calculated Compensation tab and confirm only the retirement	
8	element you selected in the run time prompt appears on the form and that	
	the element is calculated correctly.	
	Task - Manage Single Position Task Instructors	
	Manage Positions - Single > Personnel Details d	
	BigCommethodget         Migcommethodget           Request totore         Request totore           Headed         Salary (Other Compensation)	
	Oct         Nev         Dec         Jan         Feb           \$6000310         Selery Amount         3,103.16         3,003.16         3,003.16         3,003.16	
	Cf Step Invesses         Solary Amount         129, 10         129, 10         139, 45         129, 10         129, 10           4 Current ther statery         Salary Amount         3,227, 26         3,227, 26         4,948, 39         3,227, 26         3,227, 26           11 Step Invesses         Salary Amount         3,227, 26         3,227, 26         3,227, 26         3,227, 26	
	L1 Step / neurot         Salary Amount           Cost of Lung Adjustment         Salary Amount           132,12         32,22           Total Salary         Total Compensation           3,264.58         3,264.58           4,866.87         3,264.58	
	H4LF STEP (H5)         Salary Amount           PREMUM PAY APSCHEF, G &H (3C)         Other Compensation Amount         140.00         220.00         140.00         140.00	
	HALF STEP (HS) Salary Amount	
	Hwd: 510 (63)         Salary Muout         J           PRPDLIAM PAY VERGET, G. 34 (CQ)         Other Compensation Annualt         140.00         210.00         140.00           Logosity Mona         Other Compensation Annualt         345.21         845.22         245.62         845.22           Pies Bereiffs         Other Compensation Annualt         1,133.85         1,135.85         1,135.85	
	HWS FTSP HSI         Salary Amount         Information Amount <thinformation amount<="" th=""> <thinformation <="" amount<="" td=""><td></td></thinformation></thinformation>	

9	Select the "Manage Positions ->Sin Single Position form.		
	Task - Manage Single Position Task Instru Manage Positions - Single Personnel Details	uctions ಗೆ\u00fcDepartment:FN06100100 - CRE .Employee:DENISE POPF	
	Header Salary Other Compensation		
10	,	to the positionthe "Exclude from HCM narked as "Yes", indicating that this change is fresh.	

Lesson 17: Update Allocation		
Lesson Overview	This lesson will guide users through the steps to update the chartfield allocation (fund, grant, project, and activity) assigned to a position or employee in the budget year. This status change is specific to an individual employee or vacancy record.	
	The steps listed below will navigate the user to the <b>Manage Single Position</b> task, but users can also make this change from any of the manage position or employee forms.	
In this lesson you will learn:	<ul> <li>Navigate to the Manage Single Position task</li> <li>Update the chartfield allocation assigned to an employee or vacancy</li> <li>Validate the results of the calculation</li> </ul>	

Step	Action	Notes
1	From the home screen, navigate to the Manage Single Position form by going to My Task List → Personnel Management → Manage Personnel → Manage Single Position.	
2	Click on the drop-down arrow next to the Position dimension in the point of view (POV) and select a Position. Click the "Go" arrow to save your selection.	
3	Right click on the employee record and select "Personnel Details".	You can also change the allocation for a vacancy record. Allocations assigned to vacancies and employees are not linked in Hyperion (meaning the allocation for a position vacancy can be different than an employee assigned to the position)
4	Select the Allocation tab and note the fund, grant, project and activity currently assigned to the employee.	





9	In the Allocation Percent column, enter a % allocation split for "Allocation 1" and "Allocation 2". Make sure the two add up to 1 (100%). Then click the "soue" icon.	The allocation percent must add up to 100. If it does not, the allocation percent "check" row will be highlighted red, indicating you need to fix the allocation. Allocation percent's can be entered numerically (1 for 100%) or with a % sign (100% for 100%)
10	Select the Allocated Compensation tab and confirm the allocated compensation is now split based on the split funding you set on the Allocation form.	
11	Select the "Manage Positions ->Single" breadcrumb to return to the Manage Single Position form.	
12	Because you have made a change to the positionthe "Exclude from HCM Update" column should now be marked as "Yes", indicating that this change is excluded from the nightly HCM refresh.	

	Lesson 18: Set Attrition Rates		
Lesson Overview	This lesson will guide users through the steps to adjust attrition rates for a department. Attrition rates can be set at any level of the department structure. Setting rates have a top down approach, meaning the rate set at the highest level will apply to lower levels unless a rate is entered at a lower level.		
In this lesson you will learn:	<ul> <li>Navigate to the Attrition Rates task</li> <li>Enter attrition rates at any level of your department structure</li> <li>Validate the results of the calculation on the Attrition Budget Impact Review task</li> </ul>		


4	Right click on the form and select "Re-calculate Department" from the right click menu.	
5	In the run time prompt, confirm the following: Select Version: Working Select Request: Total Requests Select Department: Your department user variable Select Employees: Total Employees Select Position: Total Positions Select Launch.	Running this rule will recalculate attrition on all positions and employees in the department
6	***ADMIN STEP*** An admin will need to run the PSTN to PSTN_RPT data maps or wait until the next scheduled data maps before proceeding	Data maps run every three hours at the top of the hour, starting at 6am
6	To verify that attrition has been calculated correctly, navigate to the Attrition Budget Impact Review form under Personnel Management → Review Personnel → Attrition Budget Impact Review.	This form pulls data from PSTN_RPT, therefore the data maps need to run before updated attrition amounts appear on this form
7	Click on the drop-down arrow next the dimensions in the point of view and select a department and fund with employees whose attrition rate you did not adjust at the division level. Select the grant, project, and activity if applicable, then click the "Go" arrow to save your selection.	The attrition amount should be the percent you applied at the summary department level



8	Confirm the calculated attrition amounts reflect the rate entered on the attrition form.	Attrition is NOT calculated for the
	■ Years/Fr22         ■ Generation/opt         @ Reconstrained         @ JobCode:Total Job Code;           Relations         Total Inst         Total Inst         Total Inst         Total Inst         Total Inst	following accounts:
	Verdang   Personal  Personal  Excluding	- Overtime
	Attrice         Attrice         Attrice           500110000 + BMPLOYEE REGULAR         7 Tetal PM Element         14/001/952         5560/078         13/41/13/4           500110000 - VACADM RELF & SEXONAL HELP         7 Tetal PM Element         15/200         115/200         115/200	- Temp / Seasona
	5001000000 - EMPLOYEE OV SRTITE OT 0 Total Py Bernett 9,000 9,000     5001250000 - C0//GPUTY PA/HBUTS 2 Total Py Bernett 180,547	•
	5001220000 - R2K OOLA485	- Longevity Bonus
	3011110007-00000-00F10-0004000         7 food #yp Element         50,227         -2,129         51,080           5011140007-000740-F004000-00F10-000-000         7 food #yp Element         53,217         -2,129         51,080           50101000-1870260-000         7 food #yp Element         1,228,378         51,935         1,246,443	- Executive
	501010000 - 50CHA SECURITY         > Total Pay Element         882,727         -35,309         847,418           5011110000 - 40CHA NEDUXEA HOSFITAL INS         > Total Pay Element         207,458         -62,268         109,159           Total FTM Source Revenues Advants         Total Pay Element         207,458         -62,268         109,159	Benefits
	Total PSTN Sourced Personnel Accounts Total Pay Element 20.00.224 -799,910 19.500.014	Termination
		Payouts
9	Click on the drop-down arrow next the dimensions in the point of view and	The attrition
5	select a department and fund with employees whose attrition rate you did	amount should be
	adjust at the division level. Select the grant, project, and activity if applicable,	the override
	then click the "Go" arrow to save your selection.	percent you applied
	Myrec 502 Bij Scenario Studget . Requests Stare	at the division level
	FN01000000 - DIRECTORS OFFI         Total Fund         Image: Total Fund	
	Personnel Excluding Attrition Impact Budget Amount	
	5001100000 - EMPLOYEE REGULAR         > Total Pay Element         1.077,459         -21,549         1.055,910           5001500000 - EMPLOYEE OVERTIME OT         > Total Pay Element         5,000         5,000	
	5001250000 - L0NGEVITY PAYMENTS         > Total Pay Element         11,427         11,427           5001220000 - FLEX DOLLARS         > Total Pay Element         11,000         -220         10,780	
	S01110000 - GROUP HEALTH INSURANCE > Total Pay Element 150,000 -3,000 147,000 S01110000 - GROUP LEE INSURANCE > Total Pay Element 2,236 -45 2,191	
	S011140000 - DEHTAL PLANS > Total Pay Element 2,430 -49 2,381	
	501011000 - ECTERMENT 1 Tata Pay Emeret 146,969 -2,939 144,030 501010000 - 50CH SKURTY 9 Tata Pay Emeret 59,855 -1,137 58,655	
	501130000 - MICA REDICARE HOSPITAL INS         > Total Pay Element         15,919         -318         15,601           Total IPSTN Sourced Personnel Accounts         Total Pay Element         1,465,293         -29,317         1,456,376	
10	Confirm the calculated attrition amounts reflect the rate you entered on the	
	attrition form.	
	∰YearsFV22         ∰scenario:Budget         @_Requests/Base           FN01000000 - DEECTOR'S OFFI ▼         Total Fund         ▼ No Fright         ▼ No Fright         ▼	
	Working	
	Personning Activition Matterion Impact Budget Amount	
	500.110000 - BMPLOYEE REGULAR ≥) Total Pay Element 1.077/459 -21,549 1.055,510 500.100000 - BMPLOYEE OFFETER 0 > 1 Total Pay Element 9.0000	
	5001250000 - LONGEVITY PAYMENTS > Total Pay Bernent 11,427 11,427	
	500122000 - FLEV DOLLARS → Total Pay Element 11,000 - 2-20 10,780 50110000 - 6000 HeL1/H INSUM0 → Total Pay Element 150,000 - 3,000 147,000	
	300110000 - SAUCH PERLIN INSOMACE - 104 PA PERLIM - 120000 - 3000 - 147,000	
	5011140000 - DENTAL PLANS > Total Pay Element 2,430 -49 2,381	
	S01011000 - RETREMENT ) Total Pay Element 146,5669 - 2-2,39 144,030 S01010000 - S014, SGURTY ) Total Pay Element 55,88,55 - 1,197 58,655	

#### **Lesson 19: Manage Department Allocation Defaults**

- This lesson will guide users through the steps to manage their fund, grant, project and Lesson activity defaults for each level 0 department. Funding defaults are assigned to new Overview positions (base and requested), temp / seasonal buckets, positions moved from one department to another and transferred employees. Department allocation defaults have no impact on existing positions and employees unless the position / employee is moved or transferred
- In this lesson you will learn:
- Navigate to the Manage Department Allocation Defaults task
- Enter allocation defaults to level 0 departments •
- Validate the results of the calculation •

Step	Action	Notes
1	From the home screen, navigate to the Manage Department Allocation Defaults form by going to My Task List → Personnel Management → Manage Personnel → Manage Department Allocation Defaults.	This form displays the default funding segment for every level 0 department.
2	To change the default funding segment for a level 0 department, click the drop-down arrow in the Allocated Fund, Allocated Grant, Allocated Project, and Allocated Activity columns and select the appropriate default Fund, Grant, Project and Activity. Click "Save".	This form should be reviewed early in the budget process so that any new
	Instrume     Restance     Restance       Inst	position or bucket created will pick up the correct default. If a default is changed in a department with new positions, those new positions will need to be
3	Review the form and verify that the Department Chartfield Defaults table is set up correctly.	manually adjusted.

	Lesson 20: View HCM Refresh Flag
Lesson Overview	This lesson will guide users through the steps to check for the HCM refresh flag at the department level. If the HCM refresh flag for your department is set to "Yes", this means all positions and employees in the department are no longer getting refreshed in the nightly HCM refresh process.
In this lesson you will learn:	<ul><li>Navigate to the HCM Refresh Flag task</li><li>Review the read-only form</li></ul>

Step	Action	Notes
1	From the home screen, navigate to the HCM Refresh Flag form by going to My Task List $\rightarrow$ Personnel Management $\rightarrow$ Manage Personnel $\rightarrow$ HCM Refresh	
	Flag.	
2	Review the read-only form.	If the Exclude Department from Nightly HCM Update flag is missing, then the positions and employees in the department are still being refreshed nightly. If the flag is set to Yes", then the positions and employees in the department are excluded from the refresh.



#### Module 5: Course Summary

Objectives Achieved Congratulations! You have completed the Position and Employee Modifications course. You now should be able to:

- Make changes to positions in the budget year
- Make changes to employees in the budget year





# Module 6: Personnel Buckets Overview This module includes the following lessons: • Lesson 1: Manage Overtime Buckets

- Lesson 2: Manage Seasonal and Temp Buckets
- Lesson 3: Manage FTE Buckets



#### Module 6: Key Terms

The following key terms are used in this Module:

Overtime bucket	A bucket of dollars in the PSTN cube intended to be budgeted to the overtime account. The bucket is burdened with applicable fringes.
Temp / Seasonal Bucket	A bucket of dollars in the PSTN cube intended to be budgeted to the temp / seasonal account. The bucket is burdened with applicable fringes.
FTE Bucket	A bucket of FTE's with no associated compensation dollars.

	Lesson 1: Manage Overtime Buckets
Lesson Overview	This lesson will guide users through the steps to create and manage overtime buckets in the budget year. Overtime buckets are created in the PSTN cube and the calculated amounts are mapped to FINSTMT as part of the scheduled data map.
In this lesson you will learn:	<ul> <li>Navigate to the Manage Overtime Buckets task</li> <li>Add, adjust, and delete an overtime bucket</li> <li>Validate the results of the calculation</li> </ul>

Step	Action	Notes
1	From the home screen, navigate to the Manage Overtime Buckets form by going to My Task List → Personnel Management → Manage Personnel → Manage Overtime Buckets.	
2	<ul> <li>To create an overtime bucket, select / enter the following in one of the "Overtime Bucket 1" rows next to a level 0 department:</li> <li>-&gt;Overtime Type: Regular or Special Risk</li> <li>&gt;Overtime Annual Amount: Annual amount for the bucket (excluding retirement and taxes)</li> <li>-&gt;Allocated Fund</li> <li>-&gt;Allocated Grant</li> <li>-&gt;Allocated Activity</li> <li>-&gt;Allocation Percent: Enter in 1 or 100% (1=100%)</li> </ul>	All level 0 departments within your department user variable are listed in the rows. Each level 0 department listed will have 2 overtime bucket lines which you can fill out to create the bucket. The overtime bucket type selection drives the retirement element assignment
3	Scroll to the far right of the form and confirm the following in the last 3 gray columns: ->Salary Amount column displays the same amount you entered in as the Overtime Annual Amount ->Other Compensation Amount column has now been populated with an amount ->Total Compensation column sums up the Salary Amount and Other Compensation Amount	The Salary Amount should match the Overtime Annual Amount The Other Compensation Amount includes both retirement and taxes

	al Conservalutadat Teres P12 2 Reportations P24 Conservalutadat P	
4	Right click on the overtime bucket you just created and select "Overtime Details".	
	Allocated Fund Allocated Grant	
	N06100100 - CREDIT & COLLECTIONS     Overtime Bucket 2	
	N06100200 - CODE ENFORCEMENT BILLING Overtire Edit	
5	Select the Salary tab and confirm the following:	You can modify the
	->The starting amount you entered in the Overtime Annual Amount	amount from this tab
	column in the previous steps appears in the Overtime Annual Amount row / BegBalance column	
	Manage Overtime Buckets > Overtime Bucket Detals	
	BegSabance           Full Time / Part Time         Overtime           Overtime Annual Amoun         10,000.00	
	Pay Basis Biweek/ Budget Rate 384.6154	
6	Select the Other Compensation tab and confirm the following: ->The correct retirement element is assigned to the overtime bucket	Retirement should be regular or special risk,
	(either regular or special risk)	depending on the
	->FICA and MICA are assigned to the bucket	overtime type you
	Augustational August	selected
	Header Salary Other Compensation Alboratio Compensation Alborate C	
	FRS INVESTMENT FUAL         REGULAR (1)         Percent of Retrement: Eigèle Earnin.         0.0869         0.0145         0.0145         0.0145<	
7	Select the Allocation tab and confirm the following:	
	->The department default fund, grant, project and activity is loaded to Allocation 1	
	Rouge Overstre Builder 2- Overstre Builder Deuts           J           Tigsenwerkeliget         Apresentrefolisien - OBETT & COLECTORS           Tigsenwerkeliget         Apresentrefolisien - OBETT & COLECTORS	
	Requests teer         Representation           Header:         Safary         Other Compensation         Allocated Compensation           Advanced Frequence         Allocated Compensation         Allocated Compensation         Allocated Compensation           Advanced Frequence         Non-Network         Non-Network         Non-Network         Non-Network           Advanced Frequence         Non-Network         Non-Network         Non-Network         Non-Network         Non-Network	
	Alexano - Alexan	
8	Select the Calculated Compensation tab and confirm the following:	
	->The calculated amounts are correct. The YearTotal column for the Overtime Bucket Salary row should tie to what you entered when you	
	created the bucket	
	الله المحمد المحمد محمد المحمد المحمد محمد المحمد المحمد المحمد المحمد ال	
	Header         Salary         Other Compensation         Allocated Compensation         Allocated Compensation           Overtime Bucket Salary         Salary Amount         769,23	
	Troot Salary         Total Compensation         776-23	
	Medicare Rate         Other Compensation Intrust         11.15	



	My Task List	f						
	Personnel Administration							
	P Operating Administration	Scenario:Budget	Years:FY22	Requests:Base	.Employee:EMPVacancy		Department User Varial	
	Personnel Management	Working 💌 🕷	-					
	4 PMAnage Personnel	Departments in Row Departments in PC	OV Review Buckets					
	Manage Employees by Department	PN06100100 - CREDIT & COLLECT V	1					
	See Manage Positions by Department     See Manage Single Employee							
	Manage Single Employee     Signal Analoge Single Position	Overtime Ty	Overt	ime Annual mount Allocated Fund	Allocated Grant	Allocated Protect	45	
	Se Hanage Overtime Buckets	Overtime Bucket 1 Regular Overtime Bucket 1		1,000,009 G5004 - CREDIT & COLLECTION OP.	No. Grant	No_Project	No_Activity	
	Manage Seasonal and Temp Buckets	Overtime Bucket 2						
	Attrition Rates	Overtime Bucket 3						
	> 🞯 HCM Refresh Flag	Overtime Bucket 4						
	Manage Department Allocation Defaults	Overtime Bucket 5						
1	P Review Personnel     Operating Preparation	Overtime Bucket 6						
1	Operating Preparation     Expanded Requests	Overtime Bucket 7						
1	Actuals Mapping	Overtime Bucket 8						
1	Personnel Administration CY Forecast	Overtime Bucket 9						
	Personnel View CY Forecast	Overtime Bucket 10						
	Five Year Financial Forecast	Overtime Bucket 11 Overtime Bucket 12						
1		Overtime Bucket 12 Overtime Bucket 13						
1		Overtime Bucket 14						
		Overtime Bucket 15						
		Overtime Bucket 16						
	Dimension							
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	The third tab,	Review Bud	ckets,	will show a	ll overtime	buckets i	n the	
	The third tab, department. only see exist	The form is :	set u	p to suppres	s blank rov			
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#### Lesson 2: Manage Seasonal and Temp Buckets

Lesson bi Overview

This lesson will guide users through the steps to create and manage seasonal and temp buckets in the budget year. Temp and Seasonal buckets are created in the PSTN cube and the ew calculated amounts are mapped to FINSTMT as part of the scheduled data map.

- Navigate to the Manage Seasonal and Temp Buckets task
- Add, adjust, and delete a seasonal and temp bucket
- Validate the results of the calculation

lesson you will

In this

learn:

Step	Action	Notes
1	From the home screen, navigate to the Manage Seasonal and Temp Buckets form by going to My Task List ->Personnel Management ->Manage Personnel ->Manage Seasonal and Temp Buckets.	
2	Click on the drop-down arrow next to the Department dimension in the point of view (POV) and select a Department. Click the "Go" arrow to save your selection.	
3	Right click on the form and select "Add Seasonal or Temporary Bucket".	
4	In the run time prompt, select / enter the following: ->Select Bucket Type: Part Time Temp, Seasonal or Poll Worker ->Enter New Position Description: Text description for the bucket ->Enter Headcount: This is the headcount number specific to the bucket. The headcount will remain the same for each month ->Enter Average Hourly Rate: The average hourly rate that will be used to calculate the budget amount for the bucket. ->Oct-Sep Hours Per Head: enter the monthly hours per head for each applicable month. (Ex: If each worker will work an average of 100 hours in May, enter 100 for May). Select Launch.	The hours entered in each month drive the months in which the bucket is calculated. Leave the hours in a month blank if that month should not be calculated. Each month is calculated as Hours / Month * Headcount * Hourly Rate

	Runtime Prompts - PSTN_RULESET_BUCKETS_Add_Seas_	Temp_Bucket X	
	<ul> <li>Prompt Text</li> <li>m         <sup>™</sup> 1:Select Bucket Type:</li> <li>m         <sup>™</sup> 1:Enter New Position Description:</li> </ul>	Value Seasonal Bucket U Summer seasonal workers for new park	
	Imm * 1:Enter Headcount:     o m * 1:Enter Average Hourly Rate:     imm * 1:Enter Average Hourly Rate:     imm 1:Dott Hours per Head:	8 21.50	
	1/10v Hours per Head: 1/10e Hours per Head:		
	1.12m Hours per Head:     1.5Fe Hours per Head:     1.4Fe Hours per Head:     1.4Fe Hours per Head:		
	1-Apr Hours per Head:     1-Apr Hours per Head:     1-Apr Hours per Head:     1-Apr Hours per Head:	80	
	1:Jun Hours per Head: 1:Jul Hours per Head:	120	
	I:Aug Hours per Head:	80	
		Launch Cancel	
_	Right click on the bucket you just	added and select "Seasonal / Temp Details".	
5	Wears:FY22	Scenario:Budget	
	FN06100100 - CREDIT & COLLE( Vorking		
	Dudaet Am	Full Time / Part	
	Budget Am	Summer seasonal	
	Seasonal and Temporary B. C Seasonal / Tem	p Details Temp / Seaso	
		r Temporary Bucket	
	Delete Bucket		
6	Select the Salary tab and confirm	the following:	
0	->The Hourly Rate in the BegBala	nce column is the rate you entered in the	
	add bucket rule		
		BegBalance column is the monthly	
	headcount you entered in the ad		
	->The Hours / Month in each mo	nth is what you entered in the run time	
	prompt	,,	
		ab and confirm the following:	Taxas are applied to
7	Select the Other Compensation t	_	Taxes are applied to
	->FICA and MICA are assigned to	each temp /	
			seasonal bucket
0	Select the Allocation tab and con	firm the following:	The allocation is
8		grant, project and activity is loaded to	defaulted from the
		grant, project and activity is loaded to	
	Allocation 1		Department
			Allocation Defaults
			form
9	Select the Calculated Compensat	ion tab and confirm the following:	
9	->The calculated amounts are co		
	Head" will show calculated amou		
			ETE is calculated
10		on tab and confirm the following:	FTE is calculated
	->Bucket Salary is mapped to the	•	based on the
	->FTE is allocated to the temp an	d seasonal FTE account	headcount and
			hours entered into
			each month
	Co book to the Colory tob and ad	ust the Hourby Date and Handsouth numbers	
11	-	ust the Hourly Rate and Headcount numbers	
	in the BegBalance column. Click t	he "Save" icon.	





#### Lesson 3: Manage FTE Buckets

Lesson Overview This lesson will guide users through the steps to create and manage FTE buckets in the budget year. FTE buckets are created in the PSTN cube and the calculated FTE amounts are mapped to FINSTMT as part of the scheduled data map.

- Navigate to the Manage FTE Buckets task
  - Add and delete a FTE bucket
- Validate the results of the calculation

you will

In this

TE Buckets form by >Manage Personnel -
4
ment dimension in the k the "Go" arrow to
et".
ng: o down list n for the bucket me dcount in the bucket mber for the bucket The FT/PT selection drives the FTE stat account that the FTE amounts are allocated to



5	Right click on the bucket you just added and select "FTE Bucket Details".	
	Budget Amount     Job Code       FTE Buck     JNTANT 4 - 000318       Image: Add FTE Bucket     Image: Add FTE Bucket       Image: Delete FTE Bucket     Image: Delete FTE Bucket	
6	Select the Allocation tab and confirm the following:	The allocation is
	->The department default fund, grant, project and activity is loaded to Allocation 1	defaulted from the Department Allocation Defaults form
7	Select the Allocated Compensation tab and confirm the following:	FTE buckets are always
	->FTE is allocated to one of the vacancy FTE accounts	allocated to one of the vacancy stat accounts.
		Full Time / Part Time is
		driven from the FT/PT
		selection in the Add FTE
		Bucket run time prompt
8	Select the "Manage FTE Buckets by Department" breadcrumb to return to the previous form.	
	Karvage FTE Budgets by Department >     TE Budget Details	
	Centrario:Budget     Cent	
	Header Allocated Allocated Compensation  Budget Annual Allocated Fund Great Protect Atlocated Allocated Al	
	FTE_FE Sep 2.00 Full Time Vecant FTE GL01 - GENERAL FUND OPERATIONS No_Grant No_Project No_Activity 100% ACCOUNTANT 4-00018	
9	Right click on the bucket and select "Delete Bucket".	
	FN06100100 - CREDIT & COLLECT V Working V	
	Budget Amount Job Code Position Description Time FTE	
	FTE Bucks Cm FTE Bucket Details Full Time 2.00	
	Eat	
	In the run time prompt, select / enter the following:	Deleting a FTE bucket
10	->Confirm the bucket member to delete	works the same way as
	Select Launch.	deleting a new position

Runtime Prompts - PSTN_BUCKETS_Delet	Bucket	×
Prompt Text	Value	
* Select Position:	"FTE Bucket 1"	98.
- 77/		
		Launch Cartel



#### Module 6: Course Summary

Objectives Achieved Congratulations! You have completed the Personnel Buckets course. You now should be able to:

- Add and make changes to overtime buckets
- Add and make changes to seasonal and temp buckets
- Add FTE buckets

	Module 7: Review Personnel Records
Overview	This module includes the following lessons:
	Lesson 1: Review All Personnel Records
	<ul> <li>Lesson 2: Attrition Budget Impact Review</li> </ul>

• Lesson 3: PSTN Driven Account Review



#### Module 7: Key Terms

The following key terms are used in this Module:

PSTN Driven Accounts	Accounts whose budgets are sourced from the PSTN (position and employee database). These accounts are ready only in FINSTMT and are 100% sourced from PSTN (ex: Regular Salaries, Overtime, Temp / Seasonal, Retirement, FICA, MICA)
Pay Element	Elements assigned to positions and employee in the PSTN database. These elements are also reportable in the PSTN_RPT cube (ex: COLA, Merit, Individual Pay Components, Individual Retirement Codes)
Scheduled Data Map	Mappings are scheduled to run every three hours to push budget data from PSTN to FINSTMT and FIN_RPT

	Lesson 1: Review All Personnel Records
Lesson Overview	This lesson will guide users through the steps to review all positions, employees, and personnel buckets. This data form shows the vacancy records, employees, and buckets in an individual level 0 department.
In this lesson you will learn:	<ul><li>Navigate to the All Personnel Records task</li><li>Review the read-only form</li></ul>

Step	Action	Notes
1	From the home screen, navigate to the All Personnel Records form by going to My Task List $\rightarrow$ Personnel Management $\rightarrow$ Review Personnel $\rightarrow$ All Personnel Records.	
	My Task List         Personnel Management         Manage Personnel         Review Personnel         All Personnel Records         All Personnel Records         Attrition Budget Impact Review         PSTN Driven Account Review         Poperating Preparation         Expanded Requests         Actuals Mapping         Personnel View CY Forecast	
2	Click on the drop-down arrow next to the Department dimension in the point of view (POV) and select a Level 0 Department with employees and positions. Click the "Go" arrow to save your selection.	
3	Review all positions and employees on the form, including the totals at the bottom of the form.	This form acts as a position, employee and bucket review
	Image: constraint of the second of	form on the task list and will show all personnel records for the selected department, including total budget and FTE amounts. Note these totals are a sum of position and employees in the department and would be the total
		across all funds, grants, projects and activities.



	Lesson 2: Attrition Budget Impact Review
Lesson Overview	This lesson will guide users through the steps to review attrition impact on a department's budget.
In this lesson you will learn:	<ul> <li>Navigate to the Attrition Budget Impact Review task</li> <li>Review the read-only form</li> </ul>

Step	Action	Notes	
1	From the home screen, navigate to the Attrition Budget Impact Review form by going to My Task List → Personnel Management → Review Personnel → Attrition Budget Impact Review.		
2	Click on the drop-down arrow next to the Department, Fund, Grant, Project, and Activity dimension in the point of view (POV) and select <b>a chartfield</b> <b>combination with allocated personnel data</b> . Click the "Go" arrow to save your selection.		
3	Review the following data: Columns: ->Personnel Excluding Attrition ->personnel budget without attrition applied (ties to the Budget Amount columns on position and employee forms) ->Attrition Impact: Attrition impact on selected chartfield combination ->Budget Amount: Sum of the two first columns. These amounts are what you would see in the budget and on all FINSTMT forms and reportsThis form pulls from the PSTN_RPT database. The data on this form will be updated after each scheduled data map.		
	Rows: ->PSTN Driven Accounts: Accounts driven from the position and employee database ->Total Pay Element: This is expandable and shows the attrition impact by pay element (COLA, Merit, Longevity, etc.) Test - Attribute Budget Impact Review Test Description - CREDIT & COLECTIC To Grant The Project Test - Attribute Budget Impact Review Test Description - CREDIT & COLECTIC To Grant The Project Test - Attribute Budget Impact Review Test Description - CREDIT & COLECTIC To Grant - CREDIT & CRE	The <b>Personnel</b> <b>Excluding Attrition</b> column is what would tie to the Budget Amount column on manage position and employee forms. The <b>Budget Amount</b> column is what would tie to the budget amounts in FINSTMT	



Lesson 3: PSTN Driven Account Review		
Lesson Overview	This lesson will guide users through the steps to review the budget for personnel accounts driven from the PSTN database (positions, employees, and buckets).	
In this lesson you will learn:	<ul> <li>Navigate to the PSTN Driven Account Review task</li> <li>Review the read-only form</li> </ul>	

Step	Action	Notes
1	From the home screen, navigate to the PSTN Driven Account Review form by going to My Task List → Personnel Management → Review Personnel → PSTN Driven Account Review.	
2	Click on the drop-down arrow next to the Department, Fund, Grant, Project, and Activity dimension in the point of view (POV) and select <b>a chartfield</b> <b>combination with allocated personnel data</b> . Click the "Go" arrow to save your selection.	
3	Review the following data: Columns: ->YearTotal ->YearTotal position and employee driven budget. This column is expandable if you want to see the budget down at the month level. These amounts are <b>net of attrition</b>	The data on this form will be updated after each scheduled data map.
	Rows: ->PSTN Driven Personnel Accounts: The budget amounts for the accounts driven from the position and employee database. These amounts should tie to the "Budget Amount" column on the Attrition Budget Impact Review form Image: Display a count Review       Image: Display a count Review         Image: Display a count Review       Image: Display a count Review         Image: Display a count Review       Image: Display a count Review         Image: Display a count Review       Image: Display a count Review         Image: Display a count Review       Image: Display a count Review         Image: Display a count Review       Image: Display a count Review         Image: Display a count Review       Image: Display a count Review         Image: Display a count Review       Image: Display a count Review         Image: Display a count Review       Image: Display a count Review         Image: Display a count Review       Image: Display a count Review         Image: Display a count Review       Image: Display a count Review         Image: Display a count Review       Image: Display a count Review         Image: Display a count Review       Image: Display a count Review         Image: Display a count Review       Image: Display a count Review         Image: Display a count Review       Image: Display a count Review         Image: Display a count Review       Image: Display a count Review         Image: Display a count Review	The amounts shown on this form are net of attrition. The form is intended to be a quick check on the PSTN driven personnel accounts in at the chartfield level.



#### Module 7: Course Summary

Objectives Achieved Congratulations! You have completed the Review Personnel course. You now should be able to:

- $\checkmark$
- Review all positions, employees, and personnel buckets
- Review the impact of attrition on a department's budget
- Review the budget for personnel accounts driven from positions, employees, and personnel buckets

#### **Module 8: Running Position Reports** This module includes the following lessons: Overview Lesson 1: BAT Annual Position Report • Lesson 2: BAT Department Summary • Lesson 3: BAT Employee by Position Report • Lesson 4: BAT Employee by Position with Union Code • Lesson 5: BAT Employee Position (Full Time) Variance Report • Lesson 6: BAT Employee Position (Part Time) Variance Report • Lesson 7: BAT Fringe Expense by Employee Report • Lesson 8: BAT FTE and Compensation Total by Department • Lesson 9: BAT PSTN vs. OP Plan Compensation Reconciliation Report • Lesson 10: BAT Position Summary Report • Lesson 11: BAT Vacancy Report • Lesson 12: BAT Employee Position by Project and Activity Report • Lesson 13: BAT Personnel Overrides Lesson 14: BAT Attrition Impact Report – Detail • • Lesson 15: BAT Attrition Impact Report – Summary



#### Module 8: Key Terms

The following key terms are used in this Module:

Report Prompt	A report dimension member selection that is passed through to the report upon execution



Lesson 1: BAT Annual Position Report			
Lesson Overview	This lesson will guide users through the steps to run the BAT Annual Position Report.		
In this lesson you will learn:	<ul> <li>Navigate to the Position Reports folder</li> <li>Run the BAT Annual Position Report</li> </ul>		

Step	Action	Notes
1	From the home screen, select the "Explore" button.	
2	Click on the "Position Reports" folder to open it.	
3	Run the BAT Annual Position Report in PDF by double clicking on the report name.         Image: Type Modified Description Report in PDF by double clicking on the report name.         Image: Type Modified Description Report in Plancial Reporting 11/11/20 2:35 PM         BAT Annual Position Report Financial Reporting 11/11/20 2:35 PM         BAT Employee by Position Report Financial Reporting 11/11/20 2:38 PM         BAT Employee by Position Report Financial Reporting 11/11/20 2:38 PM         BAT Employee by Position with Union Code Financial Reporting 11/11/20 2:40 PM         BAT Employee Position (Part Time) Variance Report Financial Reporting 11/11/20 2:40 PM         BAT Finge Expense by Employee Report Financial Reporting 11/11/20 2:40 PM         BAT Finge Expense by Employee Report Financial Reporting 11/11/20 2:40 PM         BAT Finge Expense by Employee Report Financial Reporting 11/11/20 2:40 PM         BAT Finge Expense by Employee Report Financial Reporting 11/11/20 2:40 PM         BAT Position Summary Report Financial Reporting 11/11/20 2:40 PM         BAT Position Summary Report Financial Reporting 11/11/20 2:40 PM         BAT Position Summary Report Financial Reporting 11/11/20 2:42 PM         BAT Position Summary Report Financial Reporting 11/11/20 2:42 PM         BAT Position Summary Report Financial Reporting 11/11/20 2:42 PM         BAT Position Summary Report Financial Reporting 11/11/20 2:42 PM         BAT Vacancy Report Financial Reporting 11/11	
4	In the prompt window select: Scenario: Select either Budget or Current Year Personnel Forecast Year: Select the budget year if you selected the Budget scenario or select the current year if you selected the Current Year Personnel Forecast scenario Department: type in Department or use member selector to select a Department Click "OK". Click "OK". Superiments and the second select of the report. You may use the default value show, or select other member. Prove Second Seco	This position report displays current year vs. budget year FTE data broken out by JobCode description, position number, and employee. FTE data displays according to the Department that is selected in the prompt.
	Enter Department: ppFN00000000 Report Grid: Grid2	
5 Verify that the report runs. BIT Annual Position Report BIT Annual Position Report For Department, Provide CEPARTMENT Por fice Wear 2021-22 Por fice Wea	Rows: ->JobCode dimension (Leve 0 descendants of Total Job Codes)	
---	---	
	<ul> <li>-&gt;Position dimension (Level 0 descendants of Total Positions)</li> <li>-&gt;Employee dimension (Level 0 descendants of Total Employees)</li> <li>Columns: A: CY Budget Full Time Filled FTE (Account)</li> <li>B: CY Budget Part Time Filled FTE (Account)</li> <li>C: CY Budget Full Time Vacant (Account)</li> <li>D: Part Time Vacant (Account)</li> <li>E: CY Budget Total Position (FTE) (Account)</li> <li>F: Full Time Filled FTE (Account) for Year / Scenario prompt selectionss G: Part Time Filled FTE (Account) for Year / Scenario prompt selectionss H: Full Time Vacant (Account) for Year / Scenario prompt selectionss I: Part Time Vacant (Account) for Year / Scenario prompt selectionss J: Total Positions (FTE) (Account) for Year / Scenario prompt selectionss J: Total Positions (FTE) (Account) for Year /</li> </ul>	



	Lesson 2: BAT Department Summary
Lesson Overview	This lesson will guide users through the steps to run the BAT Department Summary report.
In this lesson you will learn:	<ul> <li>Navigate to the Position Reports folder</li> <li>Run the BAT Department Summary report</li> </ul>



Step	Action	Notes
1	From the home screen, select the "Explore" button.	
2	Click on the "Position Reports" folder to open it.	
3	Run the BAT Department Summary report in PDF by double clicking on the report name.	
4	In the prompt window select: Scenario: Select either Budget or Current Year Personnel Forecast Year: Select the budget year if you selected the Budget scenario or select the current year if you selected the Current Year Personnel Forecast scenario Department: type in Department or use member selector to select a Department Click "OK". Click "OK". Click "OK". Report Bit Department Summary Bit Member Names Bit Names Bit Names Bit Names Bit Names	This position report displays total compensation expenses and FT/PT filled and vacant FTE data for the Department selected in the prompt.
	Heb QK Cancel Reset	

5		Miami-Dade County Department Summary Re ent: FN0000000 - FINANCE DE For Fiscal Year: 2021-22 For Scenario: Budget			Rows: ->Account and Pay Element dimensions (several salary and benefit accounts under Total Pay Element such
	5001100000 - EMPLOYEE REGULAR 5001120000 - PART TIME EMPLOYEE 5001220000 - FLEX DOLLARS 5001250000 - LONGEVITY PAYMENTS 5010100000 - SOCIAL SECURITY	Total Employees           FY22           \$26,264,610           \$100,297           \$427,900           \$291,870           \$1,620,689	Vacancy FY22 \$2.092.001 \$0 \$335.50 \$0 \$129.704	Existing FY22 \$24,172,609 \$100,297 \$339,400 \$291,870 \$1,490,985	as Employee Regular, Part Time Employee, Flex Dollars, Longevity Payments, etc.) ->FT and PT Filled and Vacant FTE information Columns: A: Total Employees for Year / Scenario prompt selections B: Prompt Vacancy for Year / Scenario prompt selections C: Prompt Existing Employees for Year / Scenario prompt selections



	Lesson 3: BAT Employee by Position Report
Lesson Overview	This lesson will guide users through the steps to run the BAT Employee by Position report.
In this lesson you will learn:	<ul> <li>Navigate to the Position Reports folder</li> <li>Run the BAT Employee by Position Report</li> </ul>

Step	Action			Notes
1	From the home screen, select the "Explor	e" button.		
1	<u>N</u> avigate <u>F</u> ile <u>E</u> dit <u>V</u> iew Favo <u>r</u> ites <u>T</u> ools <u>H</u> elp			
	🔺 😹 🎦 Explore 🛱 🕼 📣 🚝 📝 🚚 🕬 🔤 🔒	🗄 🛃 🗞 🗿 💻		
	MDCBUD - Task List Status ×			
		·.		
2	Click on the "Position Reports" folder to o	pen it.		
	A 👦 A Explore 💼 📣			
	MDCBUD - Task List Status Explore: /Position Reports ×			
	🖌 📁 Root Name 🖾	Type Modified Description		
	Image: State Stat	Financial Reporting 11/11/20 2:35 PM Financial Reporting 11/11/20 2:38 PM		
	Operating Reports     BAT Employee by Position Report     BAT Employee by Position Report     BAT Employee by Position with Union Code	Financial Reporting 11/11/20 2:38 PM Financial Reporting 11/11/20 2:40 PM		
	Quarteny Budget Reports - BAT Employee Position (Full Time) Variance Report	Financial Reporting 11/11/20 2:40 PM		
	BAT Employee Position (Part Time) Variance Report BAT Fringe Expense by Employee Report	Financial Reporting 11/11/20 2:40 PM Financial Reporting 11/11/20 2:41 PM		
	BAT FTE and Compensation Total by Department	Financial Reporting 11/11/20 2:42 PM		
	BAT Position Summary Report	Financial Reporting         11/11/20         2:42         PM           pr         Financial Reporting         11/11/20         2:42         PM		
	BAT Vacancy Report Personnel Overrides	Financial Reporting 11/11/20 2:42 PM Financial Reporting 11/11/20 4:16 PM		
3	Run the BAT Employee by Position Repor	<b>t</b> in PDF by double clic	king on	
	the report name.			
	Name 🛆	Type Modified	Descripti	
	BAT Annual Position Report	Financial Reporting 11/11/20 2:35 PM		
	BAT Department Summary	Financial Reporting 11/11/20 2:38 PM		
	BAT Employee by Position Report	Financial Reporting 11/11/20 2:38 PM		
	BAT Employee by Position with Union Code BAT Employee Position (Full Time) Variance Report	Financial Reporting 11/11/20 2:40 PM Financial Reporting 11/11/20 2:40 PM		
	BAT Employee Position (Part Time) Variance Report	Financial Reporting 11/11/20 2:40 PM		
	BAT Fringe Expense by Employee Report	Financial Reporting 11/11/20 2:41 PM		
	BAT FTE and Compensation Total by Department	Financial Reporting 11/11/20 2:42 PM		
	BAT Position Summary Report BAT PSTN vs. OP Plan Compensation Reconciliation Report	Financial Reporting 11/11/20 2:42 PM Financial Reporting 11/11/20 2:42 PM		
	BAT Vacancy Report	Financial Reporting 11/11/20 2:42 PM		
	Personnel Overrides	Financial Reporting 11/11/20 4:16 PM		
	In the prompt window select:			This report displays
4		V		
	Scenario: Select either Budget or Current	rear Personnel Foreca	IST	personnel expense data
	Year: Select the budget year if you selected	ed the Budget scenaric	or	broken out by employee,
	select the current year if you selected the	-		position, job code
		Current real reisonn		
	Forecast scenario			description and
	Department: type in Department or use r	associated department.		
	Department			
	Click "OK".			

	Respond to Prompts			×	
	The following prompts have be	een defined in the report. You may use the c	lefault values shown, or select ot	her members.	
	Respond to Prompts at Repo	ort Level 🗸			
	Prompt Selec		Type	Source	
	Enter Department: DPFN	0000000	Report	Report: BAT Employee by Position Report Grid: All	
	Enter Scenario: Budg	pet	Report	Report: BAT Employee by Position Report Grid: Grid2	
		Edit Member Names			
	Enter Years: 2021	1-22	Report	Report: BAT Employee by Position Report	
				Grid: Grid2	
		Edit Member Names			
	Help			QK Cancel Reset	
_	Verify that the re	eport runs.			Rows:
5					->Position dimension
	DAT		-Dade County		(Level 0 descendants of
	BX	For Department: FN000	ee by Position Report 00000 - FINANCE DEPARTMENT		Total Positions)
	BUDGETING ANALYSIS TOOL		cal Year: 2021-22 cenario: Budget		->Employee dimension
	2041	$\square$	Total Employee E	mployee Longevity Personnel	
	Position Employee	Job Code Depar		Part Time Flex Dollars Payments Fringe Benefits Services	(Level 0 descendants of
	POS00003799 HILDA CASTILLO - 00030370	CHIEF, HUMAN RESOURCES DIV - 000415 DFN010	120000 1.00 \$140,956	\$0 \$1,100 \$4,249 \$51,881 \$198,186	Total Existing Employees)
	POS00003800 VIVIAN DELGADO - 00309915	DIR FIN, COMP, & ADMIN DIVISION - 000373 DENIOR SENIOR PERSONNEL SPECIALIST - 000412 DEN010		\$0 \$1,100 \$0 \$47,218 \$231,191	->Job Code dimension
	POS00003801 DAYAMI LABORDE - 00052635 POS00003802 KARINA CARRERA - 00324436	ADMINISTRATIVE SECRETARY - 000094 DFN020		\$0 \$1,100 \$1,908 \$29,903 \$112,764 \$0 \$1,100 \$0 \$23,296 \$70,883	(Level 0 descendants of
	PO500003803 EMPVacancy PO500003804 MADELIN RIZZO - 00202035	FINANCE SYSTEMS SUPPORT ADMIN - 000340 DFN030 ASSISTANT CONTROLLER - 000375 DFN030		\$0 \$1,100 \$0 \$35,598 \$146,719 \$0 \$1,100 \$2,780 \$46,007 \$223,383	•
	POS00003805 DANIA DIAZ - 00034783 POS00003806 MARIA HERNANDEZ - 00210015	ASSISTANT CONTROLLER - 000375 DFN020 ASSISTANT CONTROLLER - 000375 DFN020	40200 1.00 \$173,497	\$0 \$1,100 \$4,905 \$58,491 \$237,993 \$0 \$1,100 \$2,104 \$41,820 \$186,759	Total Job Codes)
	PO500003807 BERTA RUFAT - 00025154 PO500003810 JESSICA LOPEZ - 00313483	CONTROLLER - 000377 DFN020 FINANCE SHARED SVC SPEC 2 - 000565 DFN020		\$0 \$1,100 \$0 \$48,722 \$244,121 \$0 \$1,100 \$0 \$25,580 \$87,427	->Department dimension
	PO500003811 ANA RIERA - 00138601	FINANCE SHARED SVC SPEC 2 - 000368 DFN020	40500 1.00 \$68,956	\$0 \$1,100 \$1,396 \$27,754 \$99,205	(Level 0 descendants of
	POS00003812 RICHARD POUNALL - 00202924 POS00003813 MARIE LUCAS - 00138129	FINANCE SHARED SVC SUP - 000359 DFN020 OFFICE SUPPORT SPECIALIST 2 - 000021 DFN020		\$0 \$1,100 \$1,432 \$31,234 \$120,686 \$0 \$1,100 \$918 \$23,179 \$70,717	
		FINANCE SECTION ASSISTANT MOR .			the Department selected
					in the prompt)
					Columns (all for Voor /
					Columns (all for Year /
					Scenario prompt
					selections):
					A: Total FTE (Account)
					B: Employee Regular
					(Account)
					C: Flex Dollars (Account)
					D: Longevity Payments
					(Account)
					E: Fringe Benefits
					_
					(Account)
					F: Personnel Services
					(Account)
	1				(Account)



	Lesson 4: BAT Employee by Position with Union Code
Lesson Overview	This lesson will guide users through the steps to run the BAT Employee by Position with Union Code report.
In this lesson you will learn:	<ul> <li>Navigate to the Position Reports folder</li> <li>Run the BAT Employee by Position with Union Code report</li> </ul>

Step	Action	Notes
1	From the home screen, select the "Explore" button.	
2	Click on the "Position Reports" folder to open it.	
	INDCBUD       Task Let: Status       Explore: / Position Reports ×         Folders	
3	Run the BAT Employee by Position Report with Union Code report in PDF by double clicking on the report name.         Name       Type       Modified       Descript         BAT Annual Position Report       Financial Reporting       11/11/20 2:35 PM         BAT Department Summary       Financial Reporting       11/11/20 2:38 PM         BAT Employee by Position with Union Code       Financial Reporting       11/11/20 2:38 PM         BAT Employee by Position with Union Code       Financial Reporting       11/11/20 2:40 PM         BAT Employee Position (Put Time) Variance Report       Financial Reporting       11/11/20 2:40 PM         BAT Employee Position (Put Time) Variance Report       Financial Reporting       11/11/20 2:40 PM         BAT Finge Expense by Employee Report       Financial Reporting       11/11/20 2:40 PM         BAT Finge Expense by Employee Report       Financial Reporting       11/11/20 2:41 PM         BAT FOSTIN VS. OP Plan Compensation Reconciliation Report       Financial Reporting       11/11/20 2:42 PM         BAT Postion Summary Report       Financial Reporting       11/11/20 2:42 PM         BAT Postion Summary Report       Financial Reporting       11/11/20 2:42 PM         BAT Postion Summary Report       Financial Reporting       11/11/20 2:42 PM         BAT Yacancy Report       Financial Report	
4	In the prompt window select: Scenario: Select either Budget or Current Year Personnel Forecast Year: Select the budget year if you selected the Budget scenario or select the current year if you selected the Current Year Personnel Forecast scenario Department: type in Department or use member selector to select a Department Click "OK".	This report displays personnel expense data broken out by employee, position, job code description and associated department. This report is similar to the Employee by Position Report; however, this report includes the Union Code in the first column.

	Respond to Prompts	×	
	The following prompts	s have been defined in the report. You may use the default values shown, or select other members.	
	Respond to Prompts	at Report Level 🗸	
	Prompt	Selection Type Source	
	Enter Department:	DPFN00000000  Report Re	
	Enter Scenario:	Budget Report Report: BAT Employee by Position with Union Code	
		Grid: Grid2	
		Edit Member Names	
	Enter Years:	2021-22 Report: BAT Employee by Position with Union Code	
		Grid: Grid:	
		Edit Member Names	
	Help	QK Cancel Reset	
	L		
-	Verify that the	e report runs.	Rows:
5	- /		->Position dimension
		Miami-Dade County BAT Position-Employee Costing Report	(Level 0 descendants of
	BUDGETING ANALYSIS TOOL	For Department: FN00000000 - FINANCE DEPARTMENT For Year: 2021-22 For Departs: Budget	Total Positions)
	100 mm	Total Employue Part Time Longavity Personnel	->Employee dimension
		Union FTE Regular Employee Flax Dollars Peyments Fringe Sansfits Services	(EMPVacancy, Level 0
	EMP/acanty EMP/acanty EMP/acanty	Produce 5 Interest 54/PORT ADMIN.         Produce 5 Interest 54/PORT ADMIN.         1:00         511.022         50         51.300         50         55.555         514.719           Produce 507 CLEMK - 1:00113         Direlization 0 SLK - OPEN Lumin 100 - K         1:00         514.225         50         51.00         50         52.255         55.235	
	EMPVecancy EMPVecancy	POSSO002585 ACCCUNTANT 2 - 000316 DPH/02040400 GSAF - OPEU LowI100 - K 1.00 \$55,050 \$0 \$1,100 \$0 \$25,550 \$53,040 POSS0002585 ACCT5 PAYABLE COMP SPEC - 000325 DPH/02040200 GSAF - OPEU LowI100 - K 1.00 \$55,752 \$0 \$1,100 \$0 \$25,254 \$53,155	descendants of Total
	EMP/scancy EMP/scancy	POSCOCOSA TAX.RECOMOS SPECIALIT 7 - 000350 DHIOSO0000 LowH95 - General Engliques - N 100 \$38,857 \$0 \$1,100 \$0 \$21,446 \$51,832 SECONDERIA DOMESTINATOR 2- DHIOSO10000 H DOMESTINATOR 2- DHIOSO1000 H DOMESTINATOR 2- DHIOSO1000 H DOMESTINATOR 2- DHIOSO1000 H DOMESTINATOR 2- DHIOSO10000 H DOMESTINATOR 2- DHIOSO1000 H DOMESTINATOR 2- DHIOSO10000 H DOMESTINATOR 2- DHIOSO1000 H DOMEST	Existing Employees)
	EMPVacancy EMPVacancy	PO50002044 ACCOUNTANTS-00016 DMI050000 SSAF-CPEULeen 100-K 1.00 \$55,000 \$0 \$1,100 \$0 \$25,850 \$33,040 PO50002345 002345 DMINGE COLEMINGACEMENT CPC - PO50002345 002345 DMIOSTOTO Leen 156 - Server Employees - H 1.00 \$48,410 \$0 \$1,100 \$0 \$22,853 \$74,373	->Job Code dimension
	EMPVacancy EMPVacancy	POSCOSSI A ACCOUNT CUMP. 10010 D'INCÓSSICO Lean199 - Senem Employees - N 1.00 \$35,550 \$0 \$1.100 \$0 \$21,375 \$59,635 POSCOSAUCI CONST ACIDAR TO THE CPD - POSCOSAUCI CONST ACIDAR TO THE CPD - D'INCÓSSICO L ANN Employees - N 1.00 \$127,151 \$0 \$1.100 \$0 \$44,850 \$178,151	(Level 0 descendants of
	EMP/acancy EMP/acancy	PO50004-023 500-04-0257 00567 DP-0402000 Nex Segang-L 1.00 \$53,155 50 \$11,50 50 \$31,55 51 51,55	•
	EMP/scancy EMP/scancy EMP/scancy	POSCOCO4005 000331 DPHOSO10000 GSAF-OPEU Local 100-K 1.00 \$55,152 \$0 \$1,100 \$0 \$24,974 \$81,225 POSCOC17700 TAX RECORDS SPECIALIST 2-000350 DPHOSO0000 Local 59-General Employees -K 1.00 \$35,557 \$0 \$1,100 \$0 \$21,545 \$51,522	Total Job Codes)
	and a second	PODDENIZE PAUACE SALES DIT TEC-00058 DIVERSIGNED LoanitS-Gamma Employee-H 1.00 \$25,550 \$2 \$1,100 \$0 \$21,273 \$55,530 CREATERLINE FLAT AND ALL COLLECTION RECOVERY ADDRESSENTE FLAT AND ALL COLLECTION RECOVERY	->Department dimension
			(Level 0 descendants of
			the Department selected
			in the prompt)
			Columns (all for Year /
			-
			Scenario prompt
			selections:
			A: Union (Account)
			B: Total FTE (Account)
			C: Employee Regular
			(Account)
			D: Part Time Employee
			(Account)
			E: Flex Dollars (Account)



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	F: Longevity Payments
	(Account)
	G: Fringe Benefits
	(Account)
	H: Personnel Services
	(Account)



l	Lesson 5: BAT Employee Position (Full Time) Variance Report
Lesson Overview	This lesson will guide users through the steps to run the BAT Employee Position (Full Time) Variance Report.
In this lesso	Navigate to the Position Reports folder

• Run the BAT Employee Position (Full Time) Variance Report

you will learn:

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Step	Action	Notes			
1	From the home screen, select the "Explore" button.          Navigate       Edit       View       Favorites       Tools       Help         Image: Select the "Explore"       Image: Select the "Image: Select the "Explore"       Image: Select the "Explore"       Image: Select the "Explore"         Image: Select the "Explore"       Image: Select the "Image: Select the "Explore"       Image: Select the "Image: Select the "Image: Select the Sel				
2	Click on the "Position Reports" folder to open it.				
3	Run the BAT Employee Position (Full Time) Variance Report in PDF by double clicking on the report name.				
4	In the prompt window select: Scenario: Select either Budget or Current Year Personnel Forecast Year: Select the budget year if you selected the Budget scenario or select the current year if you selected the Current Year Personnel Forecast scenario Department: type in Department or use member selector to select a Department Click "OK".	This position report displays the current year vs. budget year FT Employee Regular comparison and the dollar and percentage variance between those two years for the Department selected in the POV.			

	Respond to Prompts			>		
	The following prompt	s have been defined in the report. You may use th	e default values shown, or select other i	members.		
		s at Report Level 🗸				
	Prompt Enter Department:	Selection DPFN00000000	Type Report	Source Report: BAT Employee Position (Full Time) Variance Report Grid: All		
	Enter Scenario:	Budget	Report	Report: BAT Employee Position (Full Time) Variance Report Grid: Grid2		
		Edit Member Names	.tl.			
	Enter Years:	2021-22	Report	Report: BAT Employee Position (Full Time) Variance Report Grid: Grid2		
		Edit Member Names				
	Halo			OK Carrel Benet		
	Help			<u>QK</u> <u>Cancel</u> <u>R</u> eset		
5	Verify that the	e report runs.				Rows: ->Employee dimension
		BAT Employee I For Department	Miami-Dade County Position (Full Time) Variance Repor Pk0000000-FINANCE DEPARTMENT For Fiscal Year: 2021-22 For Scenario: Budget	Employee Employee Employee Regular Variance Variance		(EMPVacancy, Level 0 descendants of Total Existing Employees) ->Job Code dimension
	EMP/Isancy     EMP/Isancy	ACCOUNT CLERK - 000310 PP PAR-LEGAL SUPPORT SPECIALIST - 000310 PAR-LEGAL SUPPORT SPECIALIST - 000316 TAX RECORDS INFORMATICS - 000350 PP TAX RECORDS INFOLMUTS - 000350 PP TAX RECORDS INFOLMUTS - 000350 PP INFOLOSIS INFOLMUTS - 000351 PP INFOLOSIS INFOLMUTS - 000351 PP INFOLOSIS INFOLMUTS - 000351 PP COUNTY COMMISSION CLERK - 1.040411 PP CLERK - 000013 PP CLERK - 000013 PP CLERK - 000015 PP ACCOUNTANT - 000156 PP ACCOUNTANT - 000156 PP	080002124         FIN08100100_ORED/T_SCLUCTURE           080002857         FIN08002000_GENERAL ACCOUNT           080002857         FIN0800000_AUTO TAD SECTION           0800028581         FIN080000_AUTO TAD SECTION           0800028512         FIN080000_AUTO TAD SECTION           0800028513         FIN080000_AUTO TAD SECTION           0800028513         FIN0800000_AUTO CONVERTION & TOUR           0800028513         FIN0800000_AUTO CONVERTION & TOUR           080001700         FIN0800000_AUTO CONVERSI SECTION           080001700         FIN0800000_AUTO CONVERSI SECTION           080001700         FIN0800000_AUTO CONVERSI SECTION           080001700         FIN0800000_AUTO CONVERSI SECTION           080001700         FIN0800000_AUTO CONVERSI SECTION	2021-22         9         %           NS         548,410         548,410         500           NS         548,410         548,410         500           NS         548,450         535,560         505,560           NS         535,560         535,560         500           NS         535,560         535,560         500           NS         535,560         535,560         500           NS         535,570         500         500           NS         535,587         535,587         600           NS         535,587         500,587         600           N         533,587         535,587         600           N         533,587         535,587         600           N         533,587         535,580         600           N         533,587         535,580         600           N         533,587         535,580         600           N         533,587         535,580         600           N         543,238         544,238         600           NG         544,238         544,238         600           N         545,500         855,500         700	a/	(Level 0 descendants of Total Job Codes) ->Position dimension (Level 0 descendants of Total Positions) ->Department dimension (Level 0 descendants of the Department selected in the prompt)
						Columns: A: Employee Regular CY Budget (Account) B: Employee Regular for Year / Scenario prompt selections (Account) C: Employee Variance formula column (in dollars)
						D: Employee Variance %



Hyperion Department Personnel End User Training Guide	informs
	formula column (percentage)



	Lesson 6: BAT Employee Position (Part Time) Variance Report
Lesson Overview	This lesson will guide users through the steps to run the BAT Employee Position (Part Time) Variance Report.
	Navigate to the Position Reports folder

- Navigate to the Position Reports folder •
- Run the BAT Employee Position (Part Time) Variance Report

In this lesson you will learn:

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Step	Action	Notes	
1	From the home screen, select the "Explore" button.		
2	Click on the "Position Reports" folder to open it.		
3	Run the BAT Employee Position (Part Time) Variance Report in PDF by double clicking on the report name.         Name (Descript Plancing Position Report name)         Name (Descript Plancing Position Report name)       Plancial Reporting 11/11/20 2:35 PM         BAT Department Summary       Financial Reporting 11/11/20 2:38 PM         BAT Employee by Position Report       Financial Reporting 11/11/20 2:38 PM         BAT Employee by Position with Union Code       Financial Reporting 11/11/20 2:40 PM         BAT Employee Position (Full Time) Variance Report       Financial Reporting 11/11/20 2:40 PM         BAT Employee Position (Part Time) Variance Report       Financial Reporting 11/11/20 2:40 PM         BAT Employee Position (Part Time) Variance Report       Financial Reporting 11/11/20 2:40 PM         BAT Fride Accompensation Total by Department       Financial Reporting 11/11/20 2:42 PM         BAT PSTN vs. OP Plan Compensation Reconciliation Report       Financial Reporting 11/11/20 2:42 PM         BAT Vacancy Report       Financial Reporting 11/11/20 2:42 PM         BAT Vacancy Report       Financial Reporting 11/11/20 2:42 PM         Personnel Overrides       Financial Reporting 11/11/20 2:42 PM		
4	In the prompt window select: Scenario: Select either Budget or Current Year Personnel Forecast Year: Select the budget year if you selected the Budget scenario or select the current year if you selected the Current Year Personnel Forecast scenario Department: type in Department or use member selector to select a Department Click "OK".	This position report displays the current year vs. budget year Part Time Employee comparison and the dollar and percentage variance between those two years for the Department selected in the POV.	

	Respond to Prompts		×	
	The following promp	ts have been defined in the report. You may use the default values shown, or select other	members.	
	Respond to Promp	ts at Report Level 🗸		
	Prompt Enter Department:	Selection Type Report	Source Report: BAT Employee Position (Part Time)	
			Variance Report Grid: All	
	Enter Scenario:	a to the second second	Report: BAT Employee Position (Part Time)	
	Enter Scenario.	Budget Report	Variance Report Grid: Grid2	
		Edit Member Names		
	Enter Years:	2021-22	Report: BAT Employee Position (Part Time) Variance Report Grid: Grid2	
		Edit Member Names		
	Help		QK <u>Cancel</u> <u>Reset</u>	
5	Verify that the	report runs.		Rows:
5	,	•		->Employee dimension
	DAT	Miami-Dade County		(EMPVacancy, Level 0
	BX	BAT Employee Position (Part Time) Variance Repo For Department: FR00000000 - FIRE DEPARTMENT	ort	descendants of Total
	BUDGETING ANALYSIS TOOL	For Fiscal Year: 2021-22 For Scenario: Budget		Existing Employees)
			Part Time Employee Employee	
			Part Time Employee Employee Employee Variance Variance 2021-22 \$ %	->Job Code dimension
	E).(P/Jacancy	CAPITAL INVENTORY CLERK - 000223 PO800019607 FR06030100 - LOGISTICS DIVISION AD		(Level 0 descendants of
	EMPVacancy EMPVacancy EMPVacancy	CAPITAL INVENTORY CLERK - 00223 POS001969 PR0500100 - LODISTICS DIVISIONA & FIRESLIFE SAFETY TRAINING REP - 004131 POS002553 PR05016600 - PUBLIC EDUCATION FIRE RESOLE PROCESSING SPEC 1 - 004132 POS0025552 PR05016900 - PERMITTING & RECOR	\$42,960 \$42,960 0%	Total Job Codes)
	EMPVacancy EMPVacancy	FIRE RESCUE PROCESSING SPEC 1 - 004132 PC600025653 FR02010100 - FIRE ENGINEERING BU MCFR TV PRODUCER - 004135 PC6000251165 FR01040000 - PUBUC MEDIA		,
	EMPVecancy EMPVecancy	MDFR LIFEGUARD 1 - 004158 PO500007433 FR03040302 - LIFE OCEAN HAULOVE/ MDFR LIFEGUARD 1 - 004158 PO500007460 FR03040302 - LIFE OCEAN HAULOVE/	R \$11,747 \$11,747 0%	->Position dimension
	EMPVacancy EMPVacancy	MDRR LIFEGUARD 1 - 004158 P0500007451 FR03040301 - LIFE OCEAN CRANDON MDRR LIFEGUARD 1 - 004158 P0500007453 FR03040302 - LIFE OCEAN HAULOVE	\$11,74 5 \$11,747 0%	(Level 0 descendants of
	EMPVecency EMPVecency	MDFR LIFEGUARD 1 - 004158         PO500007472         FR03040302 - LIFE CCEAN HAULOVEI           MDFR LIFEGUARD 1 - 004158         PO500007474         FR03040302 - LIFE CCEAN HAULOVEI	R \$11,747 \$11,747 0%	Total Positions)
	EMPVacancy EMPVacancy	MDFR LIFEGUARD 1 - 004158 POS00007475 FR03040302 - LIFE OCEAN HAULOVE/ MDFR LIFEGUARD 1 - 004158 POS00007478 FR03040302 - LIFE OCEAN HAULOVE/	R \$11,747 \$11,747 0%	
	EMPVecancy EMPVecancy	MDFR LIFEGUARD 1 - 004158 POS00007455 FR03040302 - LIFE OCEAN HAULOVE/ MDFR LIFEGUARD 1 - 004158 POS00007493 FR03040302 - LIFE OCEAN HAULOVE/		->Department dimension
				(Level 0 descendants of
				-
				the Department selected
				in the prompt)
				Columns:
				A: Part Time Employee
				for CY Budget (Account)
				B: Part Time Employee
				for Year / Scenario
				-
				prompt selections
				(Account)
				C: Employee Variance
				formula column (in
				dollars)
				-
				D: Employee Variance %



Hyperion Department Personnel End User Training Guide	<i>inf</i> erms
	formula column (percentage)



	Lesson 7: BAT Fringe Expense by Employee Report
Lesson Overview	This lesson will guide users through the steps to run the BAT Fringe Expense by Employee Report.
In this lesson you will learn:	<ul> <li>Navigate to the Position Reports folder</li> <li>Run the BAT Fringe Expense by Employee Report</li> </ul>

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Step	Action	Notes
1	From the home screen, select the "Explore" button.	
	Navigate <u>File Edit V</u> iew Favo <u>r</u> ites <u>T</u> ools <u>H</u> elp	
	🔺 😰 🔭 Explore 🗒 🛱 🖉 🚝 📔 🖉 👘 🗯 🗮 👘	
	MDCBUD - Task List Status ×	
2	Click on the "Position Reports" folder to open it.	
	MDCBUD - Task List Status Explore: /Position Reports × Folders /Postion Reports	
	🛛 🍘 Root Name 🛌 Type Modified Description	
	Budget Publication Reports         BAT Annual Position Report         Financial Reporting 11/11/20 2:35 PM           Budget Request Reports         BAT Department Summary         Financial Reporting 11/11/20 2:38 PM	
	Operation Reports     BAT Employee by Position Report     Financial Reporting 11/11/20 2:38 PM     BAT Employee by Position with Union Code     Financial Reporting 11/11/20 2:40 PM	
	рицателу видует керьств - 📄 ВАТ Employee Position (Full Time) Variance Report Financial Reporting 11/11/20 2:40 РМ	
	BAT Employee Position (Part Time) Variance Report Financial Reporting 11/11/20 2:40 PM BAT Fringe Expense by Employee Report Financial Reporting 11/11/20 2:41 PM	
	BAT FTE and Compensation Total by Department Financial Reporting 11/11/20 2:42 PM	
	BAT Position Summary Report Financial Reporting 11/11/20 2:42 PM BAT PSTN vs. OP Plan Compensation Reconciliation Report Financial Reporting 11/11/20 2:42 PM	
	BAT Vacancy Report Financial Reporting 11/11/20 2:42 PM Personnel Overrides Financial Reporting 11/11/20 4:16 PM	
	Run the <b>BAT Fringe Expense by Employee Report</b> in PDF by double	
3		
	clicking on the report name.	
	Name 👞 Type Modified Descripti	
	BAT Annual Position Report Financial Reporting 11/11/20 2:35 PM	
	BAT Department Summary Financial Reporting 11/11/20 2:38 PM BAT Employee by Position Report Financial Reporting 11/11/20 2:38 PM	
	BAT Employee by Position with Union Code Financial Reporting 11/11/20 2:40 PM	
	BAT Employee Position (Full Time) Variance Report Financial Reporting 11/11/20 2:40 PM	
	BAT Employee Position (Part Time) Variance Report Financial Reporting 11/11/20 2:40 PM	
	BAT Fringe Expense by Employee Report Financial Reporting 11/11/20 2:41 PM BAT FTE and Compensation Total by Department Financial Reporting 11/11/20 2:42 PM	
	BAT FTE and Compensation Total by Department Financial Reporting 11/11/20 2:42 PM BAT Position Summary Report Financial Reporting 11/11/20 2:42 PM	
	BAT PSTN vs. OP Plan Compensation Reconciliation Report Financial Reporting 11/11/20 2:42 PM	
	BAT Vacancy Report Financial Reporting 11/11/20 2:42 PM	
	Personnel Overrides Financial Reporting 11/11/20 4:16 PM	
4	In the prompt window select:	This position report
-T	Scenario: Select either Budget or Current Year Personnel Forecast	displays a breakout of
	Year: Select the budget year if you selected the Budget scenario or	fringe expenses (social
	select the current year if you selected the Current Year Personnel	security, retirement, group
	Forecast scenario	health insurance, etc.) and
		FT/PT filled and vacant FTE
	<b>Department</b> : type in Department or use member selector to select a	-
	Department	data by employee and
		position for the selected
	Click "OK".	Department.

Image: Selection prompts have been defined in the report. You may use the default values shown, or select other members.         Respond to Prompts at Report Level Image: Selection popPH00000000         Prompt Enter Department:       Selection popPH00000000         Budget       Report BAT Fringe Expense by Employee Report Grid: All         Enter Scenario:       Budget         Enter Member Names       Edit Member Names	
Respond to Prompts at Report Level       Image: Constraint of the section of the secti	
Prompt Enter Department:     Selection     Type DPFN0000000     Type Report     Source Report Grid: All       Enter Scenario:     Budget     Image: Report Budget     Report Grid: Grid: Conditional State S	
Enter Scenario: Budget Report Report: BAT Fringe Expense by Employee Report Grid: Gr	
Report Grid: Grid2	
Report Grid: Grid2	
Edit Member Names	
Enter Years: 2021-22 Poort Report: BAT Fringe Expense by Employee	
Report Grid: Grid2	
Edit Member Names	
Hep QK Cancel Reset	
5 Verify that the report runs. Rows:	
->Employee dimension	
Bit The State of t	
descendants of Total	
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Difference         Difference <thdifference< th="">         Difference         Differen</thdifference<>	
Contract Contend Contract Contract Contract Contract Contract Contract Contract	
B*#www       PM-www	
	n
(Level 0 descendants of	
the Department selecte	d
in the prompt)	
Columns (all for Year /	
Scenario prompt	
selections):	
A: Total FTE (Account)	
B: Full Time Filled FTE	
(Account)	
C: Part Time Filled FTE	
(Account)	
D: Full Time Vacant FTE	
(Account)	
E: Fringe Benefits	
(Account)	
F: Social Security (Accou	int)



G: Retirement (Account)
H: Group Health Insurance
(Account)
I: Group Life Insurance
(Account)
J: MICA Medicare Hospital
Insurance (Account)
K: Dental Plans (Account)



#### Lesson 8: BAT FTE and Compensation Total by Department Report

Lesson This lesson will guide users through the steps to run the BAT FTE and Compensation Total by Department Report.

• Navigate to the Position Reports folder

In this lesson you will learn:

• Run the BAT FTE and Compensation Total by Department Report

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Step	Action	Notes
1	From the home screen, select the "Explore" button.	
2	Click on the "Position Reports" folder to open it.	
3	Run the BAT FTE and Compensation Total by Department Report in PDF by double clicking on the report name.         Name Modified Descript         BAT Annual Postion Report       Financial Reporting 11/11/20 2:35 PM         BAT Department Summary       Financial Reporting 11/11/20 2:38 PM         BAT Employee by Postion Report       Financial Reporting 11/11/20 2:38 PM         BAT Employee by Postion (Full Time) Variance Report       Financial Reporting 11/11/20 2:40 PM         BAT Employee Postion (Full Time) Variance Report       Financial Reporting 11/11/20 2:40 PM         BAT Employee Position (Full Time) Variance Report       Financial Reporting 11/11/20 2:40 PM         BAT Employee Position (Full Time) Variance Report       Financial Reporting 11/11/20 2:40 PM         BAT Employee Position (Part Time) Variance Report       Financial Reporting 11/11/20 2:40 PM         BAT FTE and Compensation Total by Department       Financial Reporting 11/11/20 2:42 PM         BAT PSTN vs. OP Plan Compensation Reconciliation Report       Financial Reporting 11/11/20 2:42 PM         BAT Vacancy Report       Financial Reporting 11/11/20 2:42 PM </td <td></td>	
4	In the prompt window select: Scenario: Select either Budget or Current Year Personnel Forecast Year: Select the budget year if you selected the Budget scenario or select the current year if you selected the Current Year Personnel Forecast scenario Department: type in Department or use member selector to select a Department Click "OK".	This position report displays total FTE data and lists the breakout of Total Compensation accounts by employee and position for the Department selected in the prompt.

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	J: Total Taxes
	K: Total Compensation



#### Lesson 9: BAT PSTN vs. OP Plan Compensation Reconciliation Report

Lesson Overview This lesson will guide users through the steps to run the BAT PSTN vs. OP Plan Compensation Reconciliation Report.

• Navigate to the Position Reports folder

In this lesson you will learn:

• Run the BAT PSTN vs. OP Plan Compensation Reconciliation Report

MDCBUD - Task List Status ×

MDCBUD - Task List Status Explore: /Position Reports ×

🐴 👩 🎥 Explore 📄 📣

Action

From the home screen, select the "Explore" button.

Click on the "Position Reports" folder to open it.

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<u>N</u>avigate <u>F</u>ile <u>E</u>dit <u>V</u>iew Favo<u>r</u>ites <u>T</u>ools <u>H</u>elp

Step

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	infor	ms
	Notes	
Description		

3	Folders       // Position Reports         Name       Type       Modified       Description         Budget Reguest Reports       Prancial Reports       Prancial Reports       Description         Budget Reguest Reports       Prancial Reports       Prancial Reports       Description         RAT Department Summary       Financial Reports       Prancial Reports       Prancial Reports         Operation Reports       Prancial Reports       Prancial Reports       Prancial Reports         AT Employee Position (Full Tree) Variance Report       Financial Reporting       Prancial Reporting       Prancia	
	Output for the report name.         Name        Type       Modified       Description         BAT Annual Position Report       Financial Reporting       11/11/20 2:35 PM       11/11/20 2:35 PM         BAT Employee by Position Report       Financial Reporting       11/11/20 2:38 PM       11/11/20 2:38 PM         BAT Employee by Position with Union Code       Financial Reporting       11/11/20 2:40 PM       11/11/20 2:40 PM         BAT Employee Position (Full Time) Variance Report       Financial Reporting       11/11/20 2:40 PM       11/11/20 2:40 PM         BAT Employee Position (Part Time) Variance Report       Financial Reporting       11/11/20 2:40 PM       11/11/20 2:40 PM         BAT Find Compensation Total by Department       Financial Reporting       11/11/20 2:40 PM       11/11/20 2:42 PM         BAT FITE and Compensation Reconciliation Report       Financial Reporting       11/11/20 2:42 PM       11/11/20 2:42 PM         BAT PSTN vs. OP Plan Compensation Reconciliation Report       Financial Reporting       11/11/20 2:42 PM       11/11/20 2:42 PM         BAT Vacancy Report       Financial Reporting       11/11/20 2:42 PM       11/11/20 2:42 P	
4	In the prompt window select: <b>Department</b> : type in Department or use member selector to select a Department <b>Department</b> : type in the same Department or use member selector to select the Department Click "OK".	This report allows users to ensure that Total FTE and Total Compensation Expense are aligned between the PSTN_RPT and FINSTMT cubes. In the future state, PSTN_RPT is like HCP and
	The following prompts have been defined in the report. You may use the default values show, or select other members. Prompt: Enter Department: DPFN0000000 Enter Department: DPFN0000000 DEFN0000000000 DEFN000000 DEFN000000 DEFN000000 DEFN0000000 DEFN000000 DEFN0000000 DEFN000000 DEFN000000 DEFN0000000 DEFN00000 DEFN00000 DEFN00000 DEFN00000 DEFN00000 DEFN00000 DEFN00000 DEFN00000 DEFN00000 DEFN00000 DEFN00000 DEFN00000 DEFN00000 DEFN00000 DEFN00000 DEFN00000 DEFN00000 DEFN00000 DEFN00000 DEFN000000 DEFN000000 DEFN00000 DEFN000000 DEFN000000 DEF	FINSTMT is like OP Plan.



5	Verify that the r	eport runs.			Rows: ->Department dimension
			Miami-Dade Cou PSTN vs. OP Plan Reco Department: FN01010000 - DI	nciliation Report	(Level 0 descendants of the Department selected in the prompt)
		PSTN Reporting		FINSTMT	Columns (always for
		Total Compensation Total FTE Expense		Total Compensation Total FTE Expense	budget year / budget
	DFN01010000	10 \$1,463,393	DFN01010000	10 \$1,463,393	scenario):
	DFN02010000	3 \$478,216	DFN02010000	3 \$478,216	
	DFN02020200	19 \$1,936,948	DFN02020200	19 \$1,936,948	A: Total FTE (Account)
	DFN02030200	5 \$654,472	DFN02030200	5 \$654,472	
	DFN02030300 DFN02040200	8 \$937,923 39 \$3,332,524	DFN02030300 DFN02040200	8 \$937,923 39 \$3,332.524	B: Personnel Services
	DFN02040200 DFN02040300	1 \$68,101	DFN02040200 DFN02040300	1 \$68,101	(Account)



	Lesson 10: BAT Position Summary Report
Lesson Overview	This lesson will guide users through the steps to run the BAT Position Summary Report.
In this lesson	<ul> <li>Navigate to the Position Reports folder</li> <li>Run the BAT Position Summary Report</li> </ul>

you will learn:

Step	Action	Notes
1	From the home screen, select the "Explore" button.          Navigate       File       Edit       View       Favorites       Tools       Help         Image: Status       <	
2 3	Click on the "Position Reports" folder to open it.	
4	In the prompt window select: Scenario: Select either Budget or Current Year Personnel Forecast Year: Select the budget year if you selected the Budget scenario or select the current year if you selected the Current Year Personnel Forecast scenario Department: type in Department or use member selector to select a Department Click "OK".	This report displays summary FTE data broken out by positions with their job code descriptions.

1	Respond to Prompts						×		
	The following prompt	s have been defined in the repor	t. You may use the default val	lues shown, or select othe	r members.				
	Prompt	Selection		Type	Source				
	Enter Scenario:	Budget	1		Report: BAT P	osition Summary Repo	rt		
			-		Grid: Grid2				
		- Edution ber Newse							
		Edit Member Names							
	Enter Years:	2021-22		Report	Report: BAT P	osition Summary Repo	rt		
		2021-22			Grid: Grid2				
		Edit Member Names							
	Enter Department:	DPFN00000000		Teport	Report: BAT P	osition Summary Repo	rt		
		DFT10000000			Grid: Grid2				
			, ii				6		
							-0		
	Help					<u>O</u> K <u>ancel</u>	Reset		
	Verify that the r	enort runs						Rows:	
5	verify that the r	eport runs.							
								->JobCode dimension	
								(Loval O descendants	۰f
		_	Mi	ami Dada Cour	<b>1</b>			(Level 0 descendants	of
		-		ami-Dade Cour				•	of
	<b>B</b> ∧T	-		sition Summary	Report	IT		Total Job Codes)	of
	BAT		BAT Pos For Department: FN For	sition Summary 100000000 - FINAN r Fiscal Year: 2021-	CE DEPARTMEN	IT		•	of
	BUDGETING ANALYSIS TO	ol.	BAT Pos For Department: FN For	sition Summary	CE DEPARTMEN	IT		Total Job Codes) ->Position dimension	
		OL.	BAT Pos For Department: FN For	sition Summary 100000000 - FINAN r Fiscal Year: 2021-	CE DEPARTMEN	IT		Total Job Codes)	
	BUDGETING ANALYSIS TO	OL	BAT Pos For Department: FN For	sition Summary 100000000 - FINAN r Fiscal Year: 2021-	CE DEPARTMEN	іт		Total Job Codes) ->Position dimension (Level 0 descendants	
		OL	BAT Pos For Department: FN For	sition Summary 100000000 - FINAN - Fiscal Year: 2021- or Scenario: Budge	<b>Report</b> CE DEPARTMEN 22 t	IT		Total Job Codes) ->Position dimension	
	BUDGETING ANALYSIS TO	OL	BAT Pos For Department: FN For	sition Summary 100000000 - FINAN r Fiscal Year: 2021-	Part Time	IT TE Vacant Tot	al FTE	Total Job Codes) ->Position dimension (Level 0 descendants	
	BUDGETING ANALYSIS TO BUDGETING ANALYSIS TO BOD Codes	OL	BAT Pos For Department: FN For	sition Summary 10000000 - FINAN r Fiscal Year: 2021- or Scenario: Budge Full Time	Part Time		al FTE	Total Job Codes) ->Position dimension (Level 0 descendants Total Positions)	of
	Job Codes	OL.	BAT Pos For Department: FN For Fi	sition Summary 10000000 - FINAN Fiscal Year: 2021- or Scenario: Budge Scenario: Budge Full Time Filled FTE	Part Time       Filled FTE	TE Vacant Tot		Total Job Codes) ->Position dimension (Level 0 descendants	of
	Job Codes CLERK 2 - 000011	OL	BAT Pos For Department: FN For F Positions	sition Summary 00000000 - FINAN Fiscal Year: 2021 or Scenario: Budge Full Time Filled FTE 1.00	Report CE DEPARTMEN 22 t Part Time Filled FTE F	TE Vacant Tot.	1.00	Total Job Codes) ->Position dimension (Level 0 descendants Total Positions) Columns (all for Year	of
	Job Codes CLERK 2 - 000011 CLERK 2 - 000011		BAT Pos For Department: FN For Fr Positions POS00018419 POS00020116	sition Summary 100000000 - FINAN Fiscal Year: 2021 or Scenario: Budge Full Time Filled FTE 1.00 1.00	Report     CE DEPARTMEN 22     t     t     Part Time     Filled FTE F     0.00     0.00	<u>TE Vacant Tot.</u> 0.00 ⊳ 0.00	1.00 1.00	Total Job Codes) ->Position dimension (Level 0 descendants Total Positions) Columns (all for Year Scenario prompt	of
	Job Codes CLERK 2 - 000011 CLERK 2 - 000011	SPECIALIST 2 - 000021	BAT Pos For Department: FN For F Positions	sition Summary 00000000 - FINAN Fiscal Year: 2021 or Scenario: Budge Full Time Filled FTE 1.00	Report CE DEPARTMEN 22 t Part Time Filled FTE F	TE Vacant Tot.	1.00	Total Job Codes) ->Position dimension (Level 0 descendants Total Positions) Columns (all for Year	of
	Job Codes CLERK 2 - 000011 CLERK 2 - 000011 OFFICE SUPPORT S	SPECIALIST 2 - 000021 - 000202	BAT Pos For Department: FN For Fr Positions POS00018419 POS00020116 POS00003813	sition Summary 10000000 - FINAN Fiscal Year: 2021- or Scenario: Budge Full Time Filled FTE 1.00 1.00 1.00	r Report CE DEPARTMEN 22 t Part Time Filled FTE F 0.00 0.00 0.00	<u>TE Vacant Tot</u> 0.00 ଢ 0.00 0.00	1.00 1.00 1.00	Total Job Codes) ->Position dimension (Level 0 descendants Total Positions) Columns (all for Year Scenario prompt selections):	of /
	Job Codes CLERK 2 - 000011 CLERK 2 - 000011 OFFICE SUPPORT 5 INVENTORY CLERK INVENTORY CLERK	SPECIALIST 2 - 000021 - 000202 - 000202 - 000202	BAT Pos For Department: FN For Positions Pos00018419 POS00020116 POS00003813 POS00003877 POS00003977 POS00015106	sition Summary 100000000 - FINAN Fiscal Year: 2021. or Scenario: Budge Full Time Filled FTE 1.00 1.00 1.00 1.00 1.00 1.00	Part Time Filled FTE F 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.	TE Vacant         Tot.           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓	1.00 1.00 1.00 1.00 1.00 1.00	Total Job Codes) ->Position dimension (Level 0 descendants Total Positions) Columns (all for Year Scenario prompt	of /
	Job Codes CLERK 2 - 000011 CLERK 2 - 000011 OFFICE SUPPORT S INVENTORY CLERK INVENTORY CLERK INVENTORY CLERK	SPECIALIST 2 - 000021 - 000202 - 000202 - 000202 - 000202	BAT Pos For Department: FN For Fr Positions POS00018419 POS00003813 POS00003813 POS00003850 POS00003977 POS000015106 POS00015106	Sition Summary 100000000 - FINAN Fiscal Year: 2021- or Scenario: Budge Full Time Filled FTE 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00	r Report CE DEPARTMEN 22 t Part Time Filled FTE F 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.	TE Vacant         Tot.           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓	1.00 1.00 1.00 1.00 1.00 1.00	Total Job Codes) ->Position dimension (Level 0 descendants Total Positions) Columns (all for Year Scenario prompt selections): A: Full Time Filled FTE	of /
	Job Codes CLERK 2 - 000011 CLERK 2 - 000011 OFFICE SUPPORT S INVENTORY CLERK INVENTORY CLERK INVENTORY CLERK MEDICAL BILLING C	SPECIALIST 2 - 000021 - 000202 - 000202 - 000202 - 000202 - 000202 LERK - 000304	BAT Pos For Department: FN For Positions POS00018419 POS00020116 POS00003950 POS00003950 POS00003977 POS00015106 POS00018792 POS00018792	Sition Summary 100000000 - FINAN Fiscal Year: 2021- or Scenario: Budge Full Time Filled FTE 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00	r Report CE DEPARTMEN 22 t t 0.00 0.00 0.00 0.00 0.00 0.00 0.	TE Vacant         Tot.           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓	1.00 1.00 1.00 1.00 1.00 1.00 1.00	Total Job Codes) ->Position dimension (Level 0 descendants Total Positions) Columns (all for Year Scenario prompt selections): A: Full Time Filled FTE (Account)	of /
	Job Codes CLERK 2 - 000011 CLERK 2 - 000011 OFFICE SUPPORT S INVENTORY CLERK INVENTORY CLERK INVENTORY CLERK MEDICAL BILLING C	SPECIALIST 2 - 000021 - 000202 - 000202 - 000202 - 000202	BAT Pos For Department: FN For Fr Positions POS00018419 POS00003813 POS00003813 POS00003850 POS00003977 POS000015106 POS00015106	Sition Summary 100000000 - FINAN Fiscal Year: 2021- or Scenario: Budge Full Time Filled FTE 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00	r Report CE DEPARTMEN 22 t Part Time Filled FTE F 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.	TE Vacant         Tot.           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓	1.00 1.00 1.00 1.00 1.00 1.00	Total Job Codes) ->Position dimension (Level 0 descendants Total Positions) Columns (all for Year Scenario prompt selections): A: Full Time Filled FTE (Account)	of /
	Job Codes CLERK 2 - 000011 CLERK 2 - 000011 OFFICE SUPPORT S INVENTORY CLERK INVENTORY CLERK INVENTORY CLERK MEDICAL BILLING C	SPECIALIST 2 - 000021 - 000202 - 000202 - 000202 - 000202 - 000202 LERK - 000304	BAT Pos For Department: FN For Positions POS00018419 POS00020116 POS00003950 POS00003950 POS00003977 POS00015106 POS00018792 POS00018792	Sition Summary 100000000 - FINAN Fiscal Year: 2021- or Scenario: Budge Full Time Filled FTE 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00	r Report CE DEPARTMEN 22 t t 0.00 0.00 0.00 0.00 0.00 0.00 0.	TE Vacant         Tot.           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓	1.00 1.00 1.00 1.00 1.00 1.00 1.00	Total Job Codes) ->Position dimension (Level 0 descendants Total Positions) Columns (all for Year Scenario prompt selections): A: Full Time Filled FTE (Account) B: Part Time Filled FTE	of /
	Job Codes CLERK 2 - 000011 CLERK 2 - 000011 OFFICE SUPPORT S INVENTORY CLERK INVENTORY CLERK INVENTORY CLERK MEDICAL BILLING C	SPECIALIST 2 - 000021 - 000202 - 000202 - 000202 - 000202 - 000202 LERK - 000304	BAT Pos For Department: FN For Positions POS00018419 POS00020116 POS00003950 POS00003950 POS00003977 POS00015106 POS00018792 POS00018792	Sition Summary 100000000 - FINAN Fiscal Year: 2021- or Scenario: Budge Full Time Filled FTE 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00	r Report CE DEPARTMEN 22 t t 0.00 0.00 0.00 0.00 0.00 0.00 0.	TE Vacant         Tot.           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓	1.00 1.00 1.00 1.00 1.00 1.00 1.00	Total Job Codes) ->Position dimension (Level 0 descendants Total Positions) Columns (all for Year Scenario prompt selections): A: Full Time Filled FTE (Account)	of /
	Job Codes CLERK 2 - 000011 CLERK 2 - 000011 OFFICE SUPPORT S INVENTORY CLERK INVENTORY CLERK INVENTORY CLERK MEDICAL BILLING C	SPECIALIST 2 - 000021 - 000202 - 000202 - 000202 - 000202 - 000202 LERK - 000304	BAT Pos For Department: FN For Positions POS00018419 POS00020116 POS00003950 POS00003950 POS00003977 POS00015106 POS00018792 POS00018792	Sition Summary 100000000 - FINAN Fiscal Year: 2021- or Scenario: Budge Full Time Filled FTE 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00	r Report CE DEPARTMEN 22 t t 0.00 0.00 0.00 0.00 0.00 0.00 0.	TE Vacant         Tot.           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓	1.00 1.00 1.00 1.00 1.00 1.00 1.00	Total Job Codes) ->Position dimension (Level 0 descendants Total Positions) Columns (all for Year Scenario prompt selections): A: Full Time Filled FTE (Account) B: Part Time Filled FTE (Account)	of /
	Job Codes CLERK 2 - 000011 CLERK 2 - 000011 OFFICE SUPPORT S INVENTORY CLERK INVENTORY CLERK INVENTORY CLERK MEDICAL BILLING C	SPECIALIST 2 - 000021 - 000202 - 000202 - 000202 - 000202 - 000202 LERK - 000304	BAT Pos For Department: FN For Positions POS00018419 POS00020116 POS00003950 POS00003950 POS00003977 POS00015106 POS00018792 POS00018792	Sition Summary 100000000 - FINAN Fiscal Year: 2021- or Scenario: Budge Full Time Filled FTE 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00	r Report CE DEPARTMEN 22 t t 0.00 0.00 0.00 0.00 0.00 0.00 0.	TE Vacant         Tot.           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓	1.00 1.00 1.00 1.00 1.00 1.00 1.00	Total Job Codes) ->Position dimension (Level 0 descendants Total Positions) Columns (all for Year Scenario prompt selections): A: Full Time Filled FTE (Account) B: Part Time Filled FTE (Account) C: FTE Vacant	of /
	Job Codes CLERK 2 - 000011 CLERK 2 - 000011 OFFICE SUPPORT S INVENTORY CLERK INVENTORY CLERK INVENTORY CLERK MEDICAL BILLING C	SPECIALIST 2 - 000021 - 000202 - 000202 - 000202 - 000202 - 000202 LERK - 000304	BAT Pos For Department: FN For Positions POS00018419 POS00020116 POS00003950 POS00003950 POS00003977 POS00015106 POS00018792 POS00018792	Sition Summary 100000000 - FINAN Fiscal Year: 2021- or Scenario: Budge Full Time Filled FTE 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00	r Report CE DEPARTMEN 22 t t 0.00 0.00 0.00 0.00 0.00 0.00 0.	TE Vacant         Tot.           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓	1.00 1.00 1.00 1.00 1.00 1.00 1.00	Total Job Codes) ->Position dimension (Level 0 descendants Total Positions) Columns (all for Year Scenario prompt selections): A: Full Time Filled FTE (Account) B: Part Time Filled FTE (Account) C: FTE Vacant	of /
	Job Codes CLERK 2 - 000011 CLERK 2 - 000011 OFFICE SUPPORT S INVENTORY CLERK INVENTORY CLERK INVENTORY CLERK MEDICAL BILLING C	SPECIALIST 2 - 000021 - 000202 - 000202 - 000202 - 000202 - 000202 LERK - 000304	BAT Pos For Department: FN For Positions POS00018419 POS00020116 POS00003950 POS00003950 POS00003977 POS00015106 POS00018792 POS00018792	Sition Summary 100000000 - FINAN Fiscal Year: 2021- or Scenario: Budge Full Time Filled FTE 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00	r Report CE DEPARTMEN 22 t t 0.00 0.00 0.00 0.00 0.00 0.00 0.	TE Vacant         Tot.           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓           0.00         ↓	1.00 1.00 1.00 1.00 1.00 1.00 1.00	Total Job Codes) ->Position dimension (Level 0 descendants Total Positions) Columns (all for Year Scenario prompt selections): A: Full Time Filled FTE (Account) B: Part Time Filled FTE (Account)	of / E



	Lesson 11: BAT Vacancy Report
Lesson Overview	This lesson will guide users through the steps to run the BAT Vacancy Report.
In this lesson you will learn:	<ul> <li>Navigate to the Position Reports folder</li> <li>Run the BAT Vacancy Report</li> </ul>



Step	Action	Notes	
1	From the home screen, select the "Explore" butto		
<b>–</b>	<u>N</u> avigate <u>File Edit V</u> iew Favo <u>r</u> ites <u>T</u> ools <u>H</u> elp		
	🔺 😸 🎦 Explore 🛛 🛱 📣 🖴 🚺 🦯 🚜 👘	<i>9</i> =	
	MDCBUD - Task List Status ×		
2	Click on the "Position Reports" folder to open it.		
-	A 🔁 🔭 Explore 😝 📣		
	MDCBUD - Task List Status Explore: /Position Reports × Folders /Position Reports		
	🖌 🌮 Root Name 🖂 Type	Modified Description	
		g 11/11/20 2:35 PM g 11/11/20 2:38 PM	
		g 11/11/20 2:38 PM g 11/11/20 2:40 PM	
	Quarteny Budget Reports - BAT Employee Position (Full Time) Variance Report Financial Reportin	g 11/11/20 2:40 PM	
		g 11/11/20 2:40 PM g 11/11/20 2:41 PM	
		g 11/11/20 2:42 PM g 11/11/20 2:42 PM	
	BAT PSTN vs. OP Plan Compensation Reconcilation Report Financial Report	g 11/11/20 2:42 PM	
		g 11/11/20 2:42 PM g 11/11/20 4:16 PM	
3	Run the <b>BAT Vacancy Report</b> in PDF by double cli name.	cking on the report	
		Madfiel Description	
	Name Type BAT Annual Position Report Financia	Modified Descripti Reporting 11/11/20 2:35 PM	
		Reporting 11/11/20 2:38 PM	
		Reporting 11/11/20 2:38 PM	
		Reporting 11/11/20 2:40 PM	
		Reporting 11/11/20 2:40 PM Reporting 11/11/20 2:40 PM	
		Reporting 11/11/20 2:40 PM	
	BAT FTE and Compensation Total by Department Financia	Reporting 11/11/20 2:42 PM	
		Reporting 11/11/20 2:42 PM	
		Reporting 11/11/20 2:42 PM	
		Reporting 11/11/20 2:42 PM Reporting 11/11/20 4:16 PM	
4	In the prompt window select:	This position report	
- T			displays Full Time/Part
	Scenario: Select either Budget or Current Year Pe	Time vacant positions	
	Year: Select the budget year if you selected the B	and the associated	
	the current year if you selected the Current Year	salary and fringe benefit	
	scenario	dollars for the	
	Department: type in Department or use member	Department selected in	
	Department	the prompt.	
	Click "OK".		

	Respond to Prompts         The following prompts have been define         Prompt       Selection         Enter Scenario:       Budget	ver Names ver Names	e default values shown, Type Repor	rt Source Report: BAT V Grid: Grid2 rt Report: BAT V Grid: Grid2	acancy Report	
	Heb			Gind: Gind2	QK Cancel Reset	
5	Verify that the report	Rows: ->Job Code dimension (Level 0 descendants of Total Job Codes) ->Position dimension (Level 0 descendants of Total Positions)				
	FINANCE COLLECTION SPECIALIST - ( FINANCE COLLECTION SPECIALIST - ( ACCOUNT CLERK - 000310 ACCOUNT CLERK - 000310 PARALEGAL SUPPORT SPECIALIST - ( FINANCE COL&ENFORCEMENT OFC - TAX RECORDS SPECIALIST 2 - 000350	00308 POS00021208 POS00021214 POS0003829 POS0003829 POS00025792 POS0025792 00312 POS0002513 000348 POS0003963	Full Time Vacant FTE         Part Time Vacant FTE           1.00         0.00           1.00         0.00           1.00         0.00           1.00         0.00           1.00         0.00           1.00         0.00           1.00         0.00           1.00         0.00           1.00         0.00           1.00         0.00	Employee Regular         Flex Dollars           \$49,410         \$1,100           \$49,410         \$1,100           \$36,560         \$1,100           \$36,560         \$1,100           \$36,560         \$1,100           \$36,560         \$1,100           \$36,560         \$1,100           \$343,739         \$1,100           \$49,410         \$1,100           \$38,987         \$1,100	Fringe Benefits         Personnel Services           \$23,863         \$74,373           \$23,863         \$74,373           \$21,375         \$59,035           \$21,375         \$59,035           \$22,765         \$67,604           \$23,863         \$74,373           \$21,375         \$59,035           \$22,765         \$67,604           \$23,863         \$74,373           \$21,845         \$61,932	->*Hidden* Employee dimension (EMPVacancy) Columns (all for Year / Scenario prompt selections): A: Full Time Vacant FTE B: Part Time Vacant FTE C: Employee Regular D: Flex Dollars E: Part Time Employee F: Fringe Benefits G: Personnel Services


Le	sson 12: BAT Employee Position by Project and Activity
Lesson Overview	This lesson will guide users through the steps to run the BAT Employee Position by Project and Activity Report.
In this lesson you will learn:	<ul> <li>Navigate to the Position Reports folder</li> <li>Run the BAT Employee Position by Project and Activity</li> </ul>

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Step	Action	Notes
1	From the home screen, select the "Explore" button.	
2	Click on the "Position Reports" folder to open it.	
3	Run the BAT Employee Position by Project and Activity Report in PDF by double clicking on the report name.	
4	In the prompt window select: Scenario: Select either Budget or Current Year Personnel Forecast Year: Select the budget year if you selected the Budget scenario or select the current year if you selected the Current Year Personnel Forecast scenario Department: type in Department or use member selector to select a Department Fund: type in Fund or use member selector to select a Fund (defaults to All Funds) Grant: type in Grant or use member selector to select a Grant (defaults to All Grants) Click "OK".	This position report displays the combinations of project, activity, department, positions and employees for the Department, Fund and Grant selected in the prompt.

#### Hyperion Department Personnel End User Training Guide

<u> </u>	Decound to Decourt				
	Respond to Prompts			×	
	Prompt Enter Department:	Selection DPFN00000000	Report	Source Report: BAT Employee Position by Project and Activity Grid: All	
	Select Fund::	All Funds	Report	Report: BAT Employee Position by Project and Activity Grid: Grid2	
		Edit Member Names			
	Select Grant::	All Grants	eport	Report: BAT Employee Position by Project and Activity Grid: Grid2	
		Edit Member Names			
	Enter Scenario:	Budget	Report	Report: BAT Employee Position by Project and Activity Grid: Grid2	
		Edit Member Names	i.		
	Enter Years:	2021-22	eport	Report: BAT Employee Position by Project and Activity Grid: Grid2	
	Help		.11	QK Gancel Reset	
5 Ver	fify that the	report runs.			Rows: ->Project dimension
	BUDGETING AMALYSIS TOOL	<b>BAT Emplo</b> For Dep	Miami-Dade County oyee Position by Project an artment: FN0000000 - FINANCE For Fund: All Funds For Grant: All Grants For Fiscal Year: 2021-22 For Scenario: Budget	DEPARTMENT	(Level 0 descendants of All Projects) ->Activity dimension (Level 0 descendants of
	Project No Project No Project No Project	Activity No Activity No Activity No Activity	Department         Position           DFN01010000         POS00024419           DFN01010000         POS00025193           DFN0102000         POS00003799	FTE         Compensation           Employee         BARBARA GOMEZ-00329823         1.00         \$349,061           JACCUELINE CASTILLO-00315038         1.00         \$569,274           HLDA CASTILLO-00030370         1.00         \$198,186	All Activities) ->Department dimension
	No Project No Project No Project No Project No Project	No Activity No Activity No Activity No Activity No Activity	DFN01020000 POS0003801 DFN01020000 POS00017863 DFN01020000 POS00023762 DFN02010000 POS0003802 DFN02010000 POS0003806	DAYAMU LABORDE - 0005835 1.00 \$112,784 MARTA RUIZ - 00054633 1.00 \$103,972 LAZAVA BAKER - 0005845 1.00 \$113,718 KARNIK CARRERA - 0023445 1.00 \$10,883 MARIA KERMANDE - 00210015 1.00 \$188,759	(Level 0 descendants of
	No Project No Project No Project	No Activity No Activity No Activity No Activity	DFN02010000 POS00003807 DFN02020200 POS00003827 DFN02020200 POS00003829	BERTA RUFAT - 00025154 1.00 \$244,121 EMPVecancy 1.00 \$58,223 EMPVecancy 1.00 \$58,035 KAREN DE LA CONCEPCION -	Total Department) ->Position dimension
	No Project No Project No Project No Project	No Activity No Activity No Activity No Activity	DFN02020200 POS00003851 DFN02020200 POS00003860 DFN02020200 POS00003864 DFN02020200 POS00003868	00317543 1.00 \$70,020 LORI MADRIGAL - 00015668 1.00 \$144,251 ERICA OLSON - 00007016 1.00 \$155,017 A NAGE, RACORGUEZ JR - 00317069 1.00 \$112,478	(Level 0 descendants of
L	No Project	No Activity	DFN02020200 POS00018420	DAVID BAYLES - 00325560 1.00 \$55,372	Total Positions)
					->Employee dimension
					(Level 0 descendants of Total Employees)
					Columns (for Year /
					Scenario prompt
					selections):
					A: FTE
					B: Total Compensation



	Lesson 13: BAT Personnel Overrides Report
Lesson Overview	This lesson will guide users through the steps to run the Personnel Overrides Report.
In this lesson you will learn:	<ul> <li>Navigate to the Position Reports folder</li> <li>Run the Personnel Overrides Report</li> </ul>



Step	Action	Notes
1	From the home screen, select the "Explore" button.	
2	Click on the "Position Reports" folder to open it.	
3	Run the Personnel Overrides Report in PDF by double clicking on the ceptor that the ceptor in the	





5	Verify that the report runs.	Rows:
	Namidati Corry	->Department dimension (Level 0
	BAT Proceeding Report Bar Proceeding Report Buger Writing 2021-22	descendants of
	Former Frankrik Frank	Department selected
	NEISEN GATA, LECONDA (EPFance)         NOISEN         Adv.         Adv.         Mode	in the prompt)
	Posterior         Other USE / GLUECOSMENNew         PASSERSION         Amm         Adva	->Employee
	Partners         Other 5 (a) (a) (b) (b) (b) (b) (b) (b) (b) (b) (b) (b	dimension (Level 0 descendants of Total
	NETWORK ORDER LOCATION AND A LOCATIO	Employees)
		->Position dimension
		(Level 0 descendants
		of Total Positions)
		Columns (always for budget year / budget
		scenario):
		A: Budget Amount
		B: Employee Name
		C: FT/PT
		D: FTE E: Job Code
		F: Salary Grade
		G: Step
		H: Union
		I: Standard Hours
		J: Standard FTE K: Total Vacant FTE
		L: Total Filled FTE
		M: Max FTE
		N: Max Headcount
		O: Exclude from HCM
		Update (if this column
		shows "yes" the associated position
		information will
		display on the report)
		P: Exclude from HCM
		Update (if this column
		shows "yes" the associated employee
		information will
		display on the report)



	Lesson 14: BAT Attrition Impact Report - Detail
Lesson Overview	This lesson will guide users through the steps to run the BAT Attrition Impact Report – Detail Report.
In this lesson you will learn:	<ul> <li>Navigate to the Position Reports folder</li> <li>Run the BAT Attrition Impact Report - Detail</li> </ul>



Step	Action	Notes
1	From the home screen, select the "Explore" button.	
2	Click on the "Position Reports" folder to open it.	
3	Run the BAT Employee Position by Project and Activity Report in PDF by double clicking on the report name.	
4	In the prompt window select: Department: type in Department or use member selector to select a Department Click "OK". Click "OK".	This position report only applies to the budget, so scenario and year are not run time prompts.

5	BAT Attrition I For Department CTOI	-Dade County mpact Report - Detail 10000 - DirectOR's OFFICE al Year: 2021-22 ennario: Budget 9751,641 95413,002 99,413,0	Attrition (\$37,131) (\$466,154) (\$14,569) (\$101,185) (\$57,514) (\$57,514) (\$57,514) (\$57,514) (\$52,259)	Budget Amount \$714,510 \$714,510 \$8,947,048 \$8,947,048 \$1,937,798 \$1,104,580 \$932,782 \$6,172,246 \$15,833,804	Rows: ->Department Dimension. If you selected the top level department member, you would see department, division and level 0 members Columns: A: Personnel amounts excluding attrition B: Calculated attrition amounts C: Personnel amounts less



	Lesson 15: BAT Attrition Impact Report - Summary
Lesson Overview	This lesson will guide users through the steps to run the BAT Attrition Impact Report – Summary Report.
In this lesson you will learn:	<ul> <li>Navigate to the Position Reports folder</li> <li>Run the BAT Attrition Impact Report - Summary</li> </ul>

Step		Action		Notes
4	From the home screen, select the	e "Explore" button.		
1	<u>Navigate File Edit View Favorites Tools He</u>	•	*	
	MDCBUD - Task List Status ×			
2	Click on the "Position Reports" fo	older to open it.		
_	🔥 👝 🔭 Explore 📄 📣			
	MDCBUD - Task List Status Explore: /Position Reports ×			
	Folders /Position Reports	Type Modified	Description	
	📁 Budget Publication Reports 🛛 📓 BAT Annual Position Report	Financial Reporting 11/11/20 2:35 PM	Desciption	
	Budget Request Reports BAT Department Summary Concrating Reports BAT Employee by Position Reports	Financial Reporting 11/11/20 2:38 PM rt Financial Reporting 11/11/20 2:38 PM		
	Position Reports BAT Employee by Position with	Union Code Financial Reporting 11/11/20 2:38 PM Financial Reporting 11/11/20 2:40 PM		
	Quarterry Budget Reports - BAT Employee Position (Full Tim			
	BAT Employee Position (Part Til BAT Fringe Expense by Employe			
	BAT FTE and Compensation To	tal by Department Financial Reporting 11/11/20 2:42 PM		
	BAT Position Summary Report	Financial Reporting 11/11/20 2:42 PM sation Reconciliation Report Financial Reporting 11/11/20 2:42 PM		
	BAT Vacancy Report	Financial Reporting 11/11/20 2:42 PM		
	Personnel Overrides	Financial Reporting 11/11/20 4:16 PM		
3	Run the <b>BAT Employee Position</b>		•	
3	by double clicking on the report		Description	
3	by double clicking on the report	Name. Type Modified Finandal Reporting Repor 1/21/21 5:34 PM	-	
3	by double clicking on the report	Type Modified Financial Reporting Report 1/21/21 5:34 PM Financial Reporting Report 3/11/21 1:56 PM	-	
3	by double clicking on the report	Type Modified Financial Reporting Report 1/21/21 5:34 PM Financial Reporting Report 3/11/21 1:56 PM Financial Reporting Report 3/11/21 1:35 PM	-	
3	by double clicking on the report	Type Modified Financial Reporting Report 1/21/21 5:34 PM Financial Reporting Report 3/11/21 1:56 PM	-	
3	by double clicking on the report	Type Modified Financial Reporting Repor 1/21/21 5:34 PM Financial Reporting Repor 3/11/21 1:56 PM Financial Reporting Repor 1/21/21 7:35 PM Financial Reporting Repor 1/21/21 7:35 PM Financial Reporting Repor 2/4/21 1:33 PM	-	
3	by double clicking on the report /Position Reports Name	Type Modified Financial Reporting Report 1/21/21 5:34 PM Financial Reporting Report 3/11/21 1:56 PM Financial Reporting Report 3/11/21 4:35 PM Financial Reporting Report 1/21/21 7:35 PM Financial Reporting Report 1/21/21 7:35 PM Financial Reporting Report 2/4/21 1:33 PM Financial Reporting Report 2/4/21 1:38 PM	-	
3	by double clicking on the report	Type Modified Financial Reporting Repor J/21/21 5:34 PM Financial Reporting Repor J/1/21 1:556 PM Financial Reporting Repor J/1/21 1:55 PM Financial Reporting Repor J/21/21 7:35 PM Financial Reporting Repor J/21/21 7:35 PM Financial Reporting Repor 2/4/21 1:13 PM Financial Reporting Repor 2/4/21 1:13 PM	-	
3	by double clicking on the report	Type Modified Financial Reporting Report 1/21/21 5:34 PM Financial Reporting Report 3/11/21 1:56 PM Financial Reporting Report 3/11/21 4:35 PM Financial Reporting Report 1/21/21 7:35 PM Financial Reporting Report 1/21/21 7:35 PM Financial Reporting Report 2/4/21 1:33 PM Financial Reporting Report 2/4/21 1:38 PM	-	
3	by double clicking on the report Position Reports Name BAT Annual Position Report BAT Attrition Impact Report - Summary BAT Employee by Position Report BAT Employee by Position Report BAT Employee Position (Full Time) Variance Report BAT Employee Position (Part Time) Variance Report BAT Employee Position Variance Report BAT Employee Position by Project and Activity BAT Firinge Expense by Employee Report BAT Firinge Expense by Employee Report	Type         Modified           Financial Reporting Repor         1/21/21 5:34 PM           Financial Reporting Repor         3/11/21 1:56 PM           Financial Reporting Repor         3/11/21 1:56 PM           Financial Reporting Repor         3/11/21 1:55 PM           Financial Reporting Repor         1/21/21 7:32 PM           Financial Reporting Repor         1/21/21 7:35 PM           Financial Reporting Repor         2/4/21 1:33 PM           Financial Reporting Repor         2/4/21 1:33 PM           Financial Reporting Repor         1/21/21 6:03 PM           Financial Reporting Repor         1/21/21 6:03 PM           Financial Reporting Repor         1/21/21 8:42 PM           Financial Reporting Repor         2/4/21 1:15 PM	-	
3	by double clicking on the report Position Reports NameBAT Annual Position Report BAT Annual Position Report BAT Attrition Impact Report - Summary BAT Employee by Position Report BAT Employee by Position Report BAT Employee Position (Full Time) Variance Report BAT Employee Position View Carlow Report BAT Employee Position Dy Project and Activity BAT Firitian Compensation Total by Department BAT Position Summary Report	Type         Modified           Financial Reporting Repor         1/21/21 5:34 PM           Financial Reporting Repor         3/11/21 1:56 PM           Financial Reporting Repor         3/11/21 1:55 PM           Financial Reporting Repor         3/11/21 1:55 PM           Financial Reporting Repor         1/21/21 1:53 PM           Financial Reporting Repor         1/21/21 7:35 PM           Financial Reporting Repor         2/4/21 1:33 PM           Financial Reporting Repor         2/4/21 1:35 PM           Financial Reporting Repor         1/2/21 6:03 PM           Financial Reporting Repor         1/2/2/21 0:00 PM           Financial Reporting Repor         1/2/2/21 1:00 PM           Financial Reporting Repor         1/2/2/21 1:15 PM           Financial Reporting Repor         1/2/21 1:15 PM	-	
3	by double clicking on the report Position Reports Name BAT Annual Position Report BAT Attrition Impact Report - Summary BAT Employee by Position Report BAT Employee by Position Report BAT Employee Position (Full Time) Variance Report BAT Employee Position (Part Time) Variance Report BAT Employee Position Variance Report BAT Employee Position by Project and Activity BAT Firinge Expense by Employee Report BAT Firinge Expense by Employee Report	Type         Modified           Financial Reporting Repor         1/21/21 5:34 PM           Financial Reporting Repor         3/11/21 1:56 PM           Financial Reporting Repor         3/11/21 1:56 PM           Financial Reporting Repor         3/11/21 1:55 PM           Financial Reporting Repor         1/21/21 7:32 PM           Financial Reporting Repor         1/21/21 7:35 PM           Financial Reporting Repor         2/4/21 1:33 PM           Financial Reporting Repor         2/4/21 1:33 PM           Financial Reporting Repor         1/21/21 6:03 PM           Financial Reporting Repor         1/21/21 6:03 PM           Financial Reporting Repor         1/21/21 8:42 PM           Financial Reporting Repor         2/4/21 1:15 PM	-	
3	by double clicking on the report Position Reports Name ~ BAT Annual Position Report BAT Annual Position Report BAT Annual Position Report BAT Employee by Position Report BAT Employee by Position Report BAT Employee Position (Full Time) Variance Report BAT Employee Position (Part Time) Variance Report BAT Employee Position (Part Time) Variance Report BAT Employee Position Total by Department BAT Fita an Compensation Total by Department BAT PSTN vs. OP Plan Compensation Reconciliation Report	Type Modified Financial Reporting Repor 1/21/21 5:34 PM Financial Reporting Repor 3/11/21 1:56 PM Financial Reporting Repor 3/11/21 1:55 PM Financial Reporting Repor 1/21/21 7:35 PM	-	
3	by double clicking on the report	Type         Modified           Financial Reporting Repor         1/21/21 5:34 PM           Financial Reporting Repor         3/11/21 1:56 PM           Financial Reporting Repor         3/11/21 1:56 PM           Financial Reporting Repor         1/21/21 1:57 PM           Financial Reporting Repor         1/21/21 1:35 PM           Financial Reporting Repor         1/21/21 1:35 PM           Financial Reporting Repor         2/4/21 1:33 PM           Financial Reporting Repor         2/4/21 1:03 PM           Financial Reporting Repor         1/21/21 6:32 PM           Financial Reporting Repor         1/21/21 1:03 PM           Financial Reporting Repor         1/21/21 1:03 PM           Financial Reporting Repor         1/21/21 1:31 PM           Financial Reporting Repor         1/21/21 1:32 PM           Financial Reporting Repor         1/21/21 1:31 PM           Financial Reporting Repor         1/21/21 1:31 PM           Financial Reporting Repor         1/21/21 1:32 PM           Financid Reporting Repor         1/21/21 1:32 PM<	-	
	by double clicking on the report Position Reports Name	Type         Modified           Financial Reporting Repor         1/21/21 5:34 PM           Financial Reporting Repor         3/11/21 1:56 PM           Financial Reporting Repor         3/11/21 1:56 PM           Financial Reporting Repor         1/21/21 1:57 PM           Financial Reporting Repor         1/21/21 1:35 PM           Financial Reporting Repor         1/21/21 1:35 PM           Financial Reporting Repor         2/4/21 1:33 PM           Financial Reporting Repor         2/4/21 1:03 PM           Financial Reporting Repor         1/21/21 6:32 PM           Financial Reporting Repor         1/21/21 1:03 PM           Financial Reporting Repor         1/21/21 1:03 PM           Financial Reporting Repor         1/21/21 1:31 PM           Financial Reporting Repor         1/21/21 1:32 PM           Financial Reporting Repor         1/21/21 1:31 PM           Financial Reporting Repor         1/21/21 1:31 PM           Financial Reporting Repor         1/21/21 1:32 PM           Financid Reporting Repor         1/21/21 1:32 PM<	-	This position report only
3	by double clicking on the report	Type         Modified           Financial Reporting Repor         1/21/21 5:34 PM           Financial Reporting Repor         3/11/21 1:56 PM           Financial Reporting Repor         3/11/21 1:56 PM           Financial Reporting Repor         1/21/21 1:57 PM           Financial Reporting Repor         1/21/21 1:35 PM           Financial Reporting Repor         1/21/21 1:35 PM           Financial Reporting Repor         2/4/21 1:33 PM           Financial Reporting Repor         2/4/21 1:03 PM           Financial Reporting Repor         1/21/21 6:32 PM           Financial Reporting Repor         1/21/21 1:03 PM           Financial Reporting Repor         1/21/21 1:03 PM           Financial Reporting Repor         1/21/21 1:31 PM           Financial Reporting Repor         1/21/21 1:32 PM           Financial Reporting Repor         1/21/21 1:31 PM           Financial Reporting Repor         1/21/21 1:31 PM           Financial Reporting Repor         1/21/21 1:32 PM           Financial Reporting Repor         1/21/21 1:32 PM           Financial Reporting Repor         1/21/21 1:32 PM           Financial Reporting Repor         1/21/21 5:24 PM           Financial Reporting Repor         1/21/21 6:24 PM	-	This position report only
	by double clicking on the report Position Reports Name BAT Annual Position Report BAT Annual Position Report BAT Employee by Position Report BAT Employee by Position Report BAT Employee Position (Full Time) Variance Report BAT Employee Position (Full Time) Variance Report BAT Employee Position (Part Time) Variance Report BAT Employee Position (Part Time) Variance Report BAT Fringe Expense by Employee Report BAT Position Summary Report Dersonnel Overrides In the prompt window select:	Type         Modified           Financial Reporting Repor         1/21/21 5:34 PM           Financial Reporting Repor         3/11/21 1:56 PM           Financial Reporting Repor         3/11/21 1:56 PM           Financial Reporting Repor         3/11/21 1:53 FM           Financial Reporting Repor         1/21/21 7:32 PM           Financial Reporting Repor         1/21/21 7:35 PM           Financial Reporting Repor         2/4/21 1:33 PM           Financial Reporting Repor         2/4/21 1:33 PM           Financial Reporting Repor         1/21/21 6:03 PM           Financial Reporting Repor         1/21/21 8:04 PM           Financial Reporting Repor         1/21/21 8:24 PM           Financial Reporting Repor         1/21/21 8:21 PM           Financial Reporting Repor         1/2/30/20 3:07 PM	Description	applies to the budget, so
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	by double clicking on the report Position Reports Name _ BAT Amual Position Report BAT Attrition Impact Report _ BAT Employee by Position Report BAT Employee Position (Full Time) Variance Report BAT Employee Position by Project and Activity BAT FIE and Compensation Total by Department BAT Position Summary Report BAT FIETN vs. OP Plan Compensation Reconciliation Report BAT Personnel Overrides In the prompt window select: Department: type in Department	Type         Modified           Financial Reporting Repor         1/21/21 5:34 PM           Financial Reporting Repor         3/11/21 1:56 PM           Financial Reporting Repor         3/11/21 1:56 PM           Financial Reporting Repor         3/11/21 1:53 FM           Financial Reporting Repor         1/21/21 7:32 PM           Financial Reporting Repor         1/21/21 7:35 PM           Financial Reporting Repor         2/4/21 1:33 PM           Financial Reporting Repor         2/4/21 1:33 PM           Financial Reporting Repor         1/21/21 6:03 PM           Financial Reporting Repor         1/21/21 8:04 PM           Financial Reporting Repor         1/21/21 8:24 PM           Financial Reporting Repor         1/21/21 8:21 PM           Financial Reporting Repor         1/2/30/20 3:07 PM	Description	applies to the budget, so scenario and year are not
	by double clicking on the report Position Reports Name BAT Annual Position Report BAT Annual Position Report BAT Employee by Position Report BAT Employee by Position Report BAT Employee Position (Full Time) Variance Report BAT Employee Position (Full Time) Variance Report BAT Employee Position (Part Time) Variance Report BAT Employee Position (Part Time) Variance Report BAT Fringe Expense by Employee Report BAT Position Summary Report Dersonnel Overrides In the prompt window select:	Type         Modified           Financial Reporting Repor         1/21/21 5:34 PM           Financial Reporting Repor         3/11/21 1:56 PM           Financial Reporting Repor         3/11/21 1:56 PM           Financial Reporting Repor         3/11/21 1:53 FM           Financial Reporting Repor         1/21/21 7:32 PM           Financial Reporting Repor         1/21/21 7:35 PM           Financial Reporting Repor         2/4/21 1:33 PM           Financial Reporting Repor         2/4/21 1:33 PM           Financial Reporting Repor         1/21/21 6:03 PM           Financial Reporting Repor         1/21/21 8:04 PM           Financial Reporting Repor         1/21/21 8:24 PM           Financial Reporting Repor         1/21/21 8:21 PM           Financial Reporting Repor         1/2/30/20 3:07 PM	Description	applies to the budget, so
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	Respond to Prompts ×	
	The following prompt has been defined in the report. You may use the default values shown, or select other members.	
	Prompt Selection Type Source Enter Department: permononon Report Report Report -	
	Enter Department: DPCT00000000 Report Report SAT Attrition Impact Report - Summary Grid: Grid2	
	Edit Member Names	
	Help QK Cancel Reset	
5	Verify that the report runs.	Rows:
5		->Account Dimension.
		The rows will show all of
	Miami-Dade County BAT Attrition Impact Report - Summary	
	For Department: CT0000000 - COMMUNICATIONS & CUST EXPER. For Fload Vear: 2021-22	the accounts driven from
	BUDGETING ANALYSS TOOL For Scenario: Budget	position and employee
	Personnel Excluding Attrition Attrition Budget Amount	data for the selected
	5001100000 - EMPLOYEE REGULAR \$11,642,349 (\$582,117) \$11,060,232 5001220000 - FLEX DOLLARS \$181,500 (\$6,075) \$172,425	department
	5001250000 - LONGEVITY PAYMENTS \$153,891 \$0 \$153,891 5010100000 - SOCIAL SECURITY \$731,106 (\$36,555) \$694,551	acparentent
	5010110000 - RETIREMENT \$1,365,864 (\$66,753) \$1,325,071 5011100000 - GROUP HEALTH INSURANCE \$2,310,000 (\$115,500) \$2,194,500	
	5011110000 - GROUP LIFE INSURANCE \$23,806 (\$1,150) \$22,616 5011130000 - MICA MEDICARE HOSPITAL INS \$171,045 (\$8,52) \$162,493	Columns:
	5011140000 - DENTAL PLANS 549,500 (\$2,475) 547,025 Total \$16,659,062 (\$825,259) \$15,833,804	A: Personnel amounts
		excluding attrition
		B: Calculated attrition
		amounts
		C: Personnel amounts less
		attrition. This is the
		amount budgeted



#### Module 8: Course Summary

Objectives Congratulations! You have completed the Running Position Reports course. You now should be able to:

- Navigate to the Explore page and to the Position Reports folder
- Run all Position reports within this folder





Module 9: Personnel Current Year Forecast		
Overview	This module includes the following lesson:	
	Lesson 1: View Current Year Forecast	



### Module 9: Key Terms

The following key terms are used in this Module:

Current Year Personnel Forecast	A position and employee level forecast for the rest of the current year that is calculated nightly as part of the integration with HR. Includes all existing employees and vacancies.

Lesson 1: View Current Year Forecast					
Lesson Overview	This lesson will guide users through the steps to view current year personnel forecast results. The personnel current year forecast is re-calculated every night as part of the integration with HCM. The amounts shown in the forecast are the sum of all future pay periods in the current year. Both employees and vacancies are calculated as part of the current year forecast, but users can report on just existing employees in the position reporting cube (PSTN_RPT)				
In this lesson you will learn:	<ul> <li>Navigate to the Personnel View CY Forecast folder</li> <li>Review the read-only forms within the View Personnel folder</li> </ul>				

Step	Action	Notes
1	From the home screen, navigate to the View Employees by Department form by going to My Task List → Personnel View CY Forecast → View Personnel → View Employees by Department.	This form is read- only for department users.
2	Click on the drop-down arrow next to the Department in the point of view (POV) and select <b>a chartfield combination with allocated personnel data</b> . Click the "Go" arrow to save your selection.	This data is recalculated every night based on the latest data from HR.
3	Review the read-only form. The <b>Budget Amount</b> column is the calculated amounts for the employee or vacancy for the remainder of the current year.	OMB manages a form the stores the number of pay periods left in the current year.
4	Similar to the budget, you can also view these results on the next three forms on the task list: ->View Positions by Department ->View Single Employee ->View Single Position Navigate to the Attrition Rates form by going to Personnel View CY Forecast	All of the forms in this task list are read-only for department users.
5	$\rightarrow$ View Personnel $\rightarrow$ Attrition Rates. This form displays the attrition rates set for the current year forecast for your	OMB maintains the
	department. Review the attrition rates on the read-only form.	current year attrition rates

Hyperion Department Personnel End User Training Guide		informs
7	Current year personnel forecast data is mapped to the position reporting cube (PSTN_RPT) after it is calculated every night to allow for analysis and reporting.	



#### Module 9: Course Summary

Objectives Achieved Congratulations! You have completed the Personnel Current Year Forecast course. You now should be able to:

- Navigate to the Personnel View CY Forecast folder
- Review current year personnel forecast results

#### Module 10: Course Summary

Course Summary The Course Summary module covers three topics:

- Course Content Summary
- Additional Training and Job Aids
- Course Evaluation



### Module 10: Course Summary

Objectives Achieved Congratulations on completing the Hyperion Personnel Training course. Users now should be able to:



- Navigate to and become familiar with position and employee forms
- Make modifications to positions and employees
- Manage, create, and delete personnel buckets
- Review all personnel records, attrition budget impact, and PSTN driven accounts
- Run all position reports
- View the results of the current year personnel forecast

### Module 10: Course Summary

Additional

Training and Job Supplemental training materials will be provided separately Aids



#### Module 10: Course Summary

Questionnaire Course questionnaire will be provided separately