



Human Capital Planning

**Training Manual and
Reference Guide for FY2019**

**Salary Roll Development
In Hyperion**



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Essential Information

1. CLASS, UCLASS, WAGES, and WAGET account codes are included in the salary planning process. Undergrad student records (Benefits Code 'NEL') and GRAD will NOT be downloaded from the HR system; all other WAGES records will be downloaded. However, they do not carry a position code, and any number of student records may be added to assist in salary budgets planning.
2. Add Vacant Positions – Vacant positions are not loaded and must be added in order to include your anticipated salary requirements for these positions. Refer to Page 14 for important information concerning necessary field values for these budgets. Absolutely NO VACANT positions are allowed in FUND 18.
You may add total student pool wages into one vacant position.
3. Because of timing, it is possible that a position that had been vacant has since been filled and needs to be considered in the salary roll development process. The position number should already be established, simply add a position budget for it using the "Add" feature and use the established CU position number.
4. Data entered in the HCP Budget panels does not affect any change to any other HR or Financial data.

Essential Information (cont.)

5. Coordinate the salary planning of positions that reside outside your area for which your area has salary responsibility with the Business Officer of the other area. If contact has not already been made by the home department or center to coordinate the data entry, make the appropriate contact to coordinate the data entry. Please do not budget a full 100% of a position's salary if you only pay a portion of the salary. No position should be budgeted in total at greater than 100%
6. Run the Review Allocation report before you make any changes to have your "starting point" (See pg. 19 for instructions).
7. Budget Centers are to review and edit the loaded salary roll dated 07/01/2017 by **April 27, 2018**.

Hyperion Log-In Instructions

Supported Browsers:



Firefox (see next page)

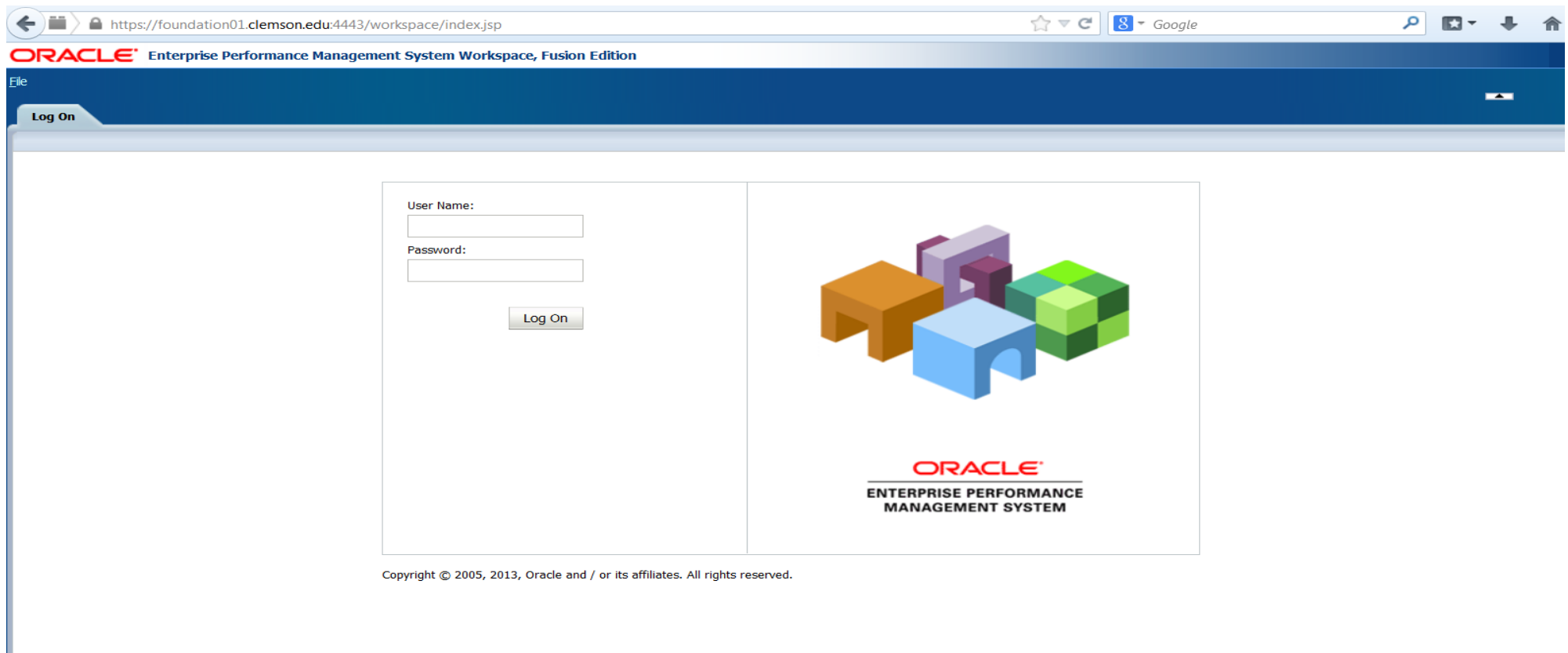


Internet Explorer (version 9 or lower)

Hyperion URL:

<https://foundation01.clemson.edu:4443/workspace/index.jsp>

Log in with your Novell user name and password



ORACLE Enterprise Performance Management System Workspace, Fusion Edition

File

Log On

User Name:

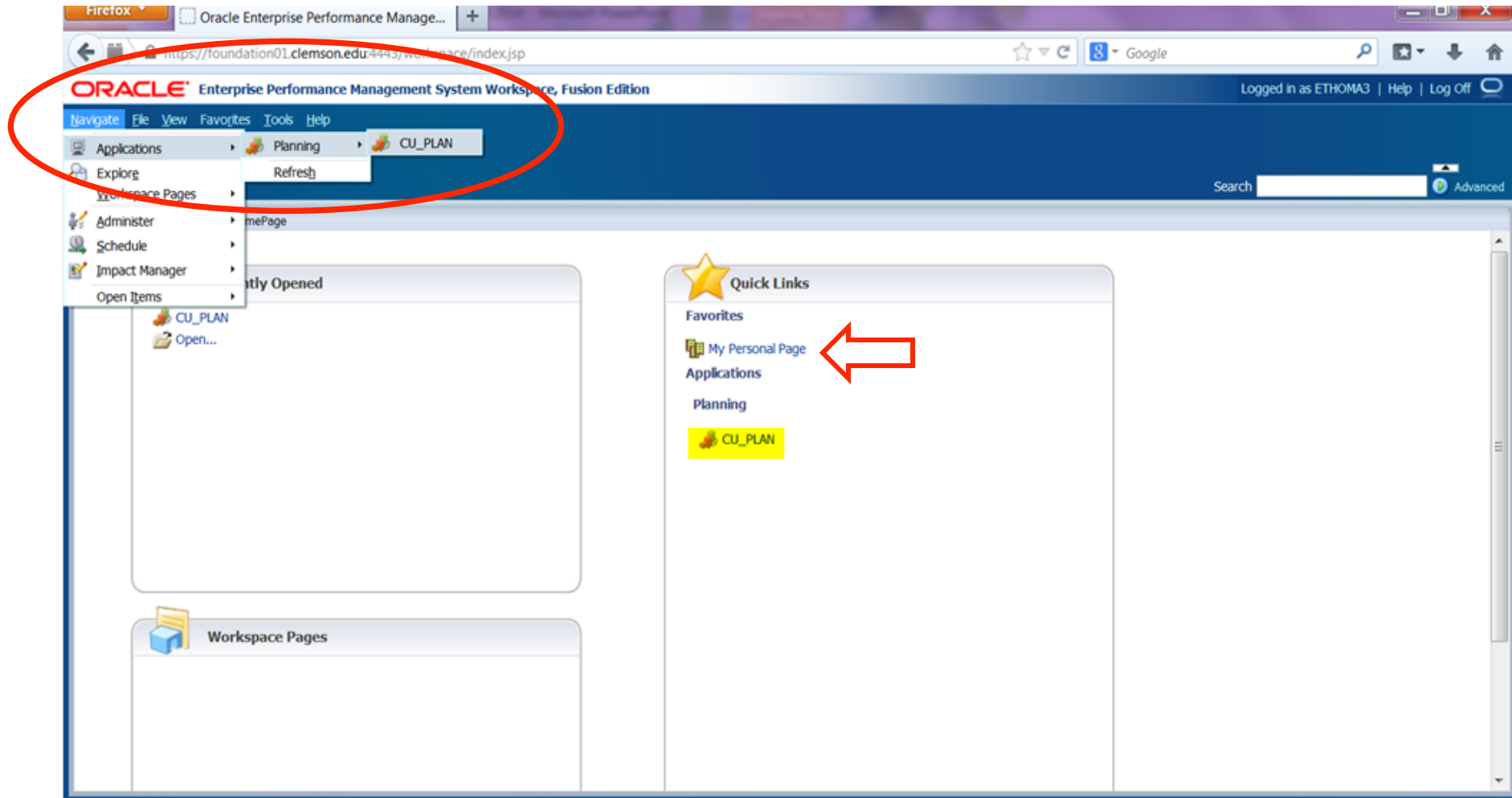
Password:

Log On

ORACLE
ENTERPRISE PERFORMANCE
MANAGEMENT SYSTEM

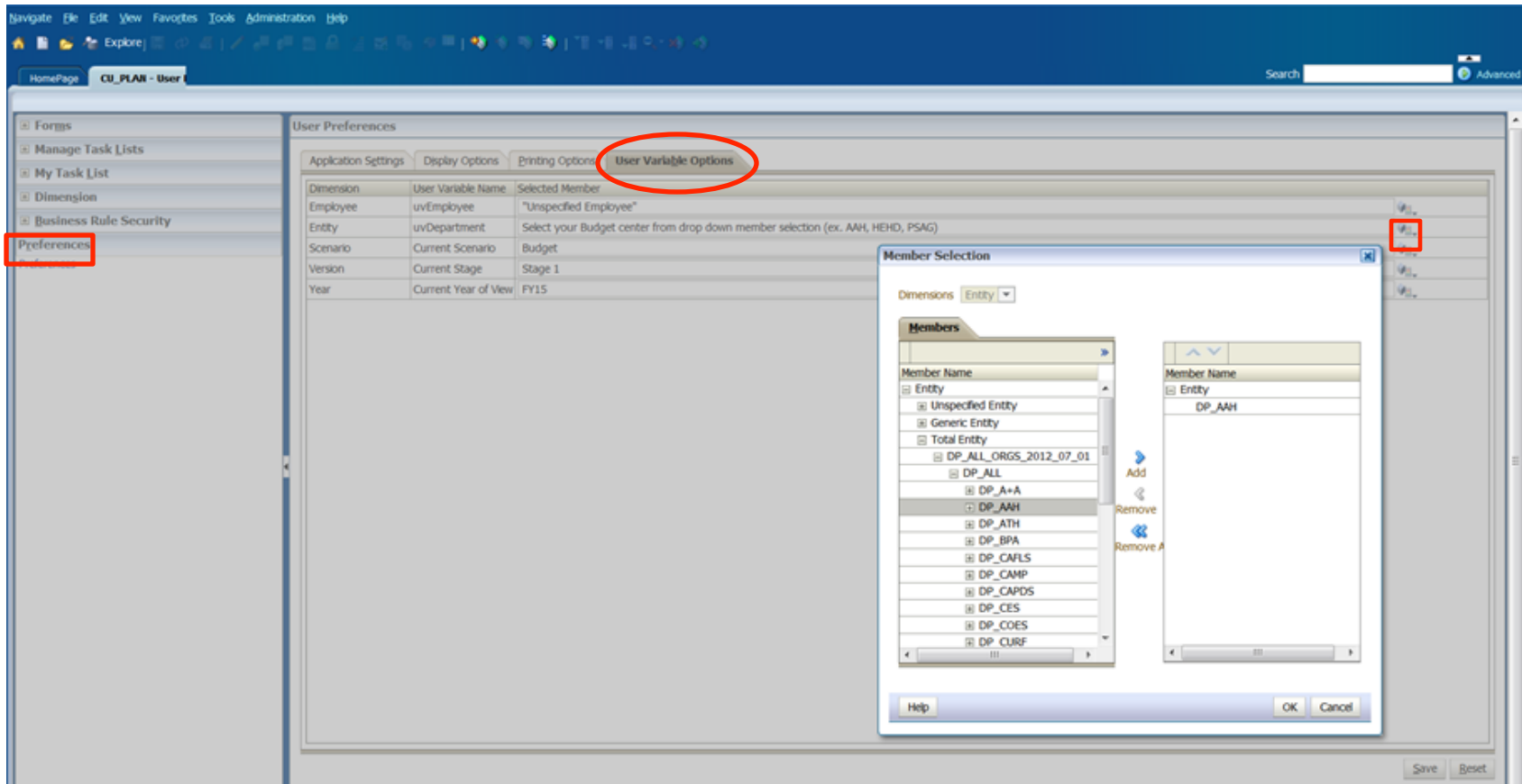
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Initial Human Capital Planning (HCP) access requires selection of the navigation string circled below: Navigate, Applications, Planning, CU_Plan. The CU_Plan connection will appear in the *Quick Links* panel for all subsequent log-in's.



One Time Set Up Of User Preferences

Once logged into CU_Plan, changes to user preferences are required. This is done by selecting **Preferences** located in left panel, then choose **User Variable Option** tab. Enter the Employee, Entity, Scenario, Version, and Year (i.e. FY19) and SAVE.



Hyperion Terminology:

Entity = Represents the four digit department number (future non-compensation use only; selection does not restrict access)

Scenario = Differentiates initial budget, budget amendments, and actuals

Version = Represents stages of budget development entry

Year = Represents the fiscal year


Human Capital Planning (HCP) Updates

The first step to updating employee records within the HCP forms is to select ***My Task List*** in the left panel then expand ***the CU_Plan Budget Preparation*** folder, finally left click ***Maintain Position & Employee Assignments***.

The screenshot displays the HCP interface. On the left, the 'Forms' panel is expanded to 'My Task List'. Under the 'CU_PLAN Budget Preparation' folder, the 'Maintain Position and Employee Assignment' task is highlighted with a red box. The main area shows the 'Task List Status' section, which includes a pie chart indicating 'Incomplete, 100.0%' for 'Task List Status - All'. Below the chart is a table titled 'Task List Tasks - All' with columns: Task, Type, Status, Due Date, Alert, Completed Date, Instructions, and Action.

Task	Type	Status	Due Date	Alert	Completed Date	Instructions	Action
CU_PLAN Budget Preparation							
Maintain Position and Employee Assignments							
Review Allocations							
Review Compensation Budgets							
Review Position Budgets							
Review Employee Budgets							
Review Element Budgets							

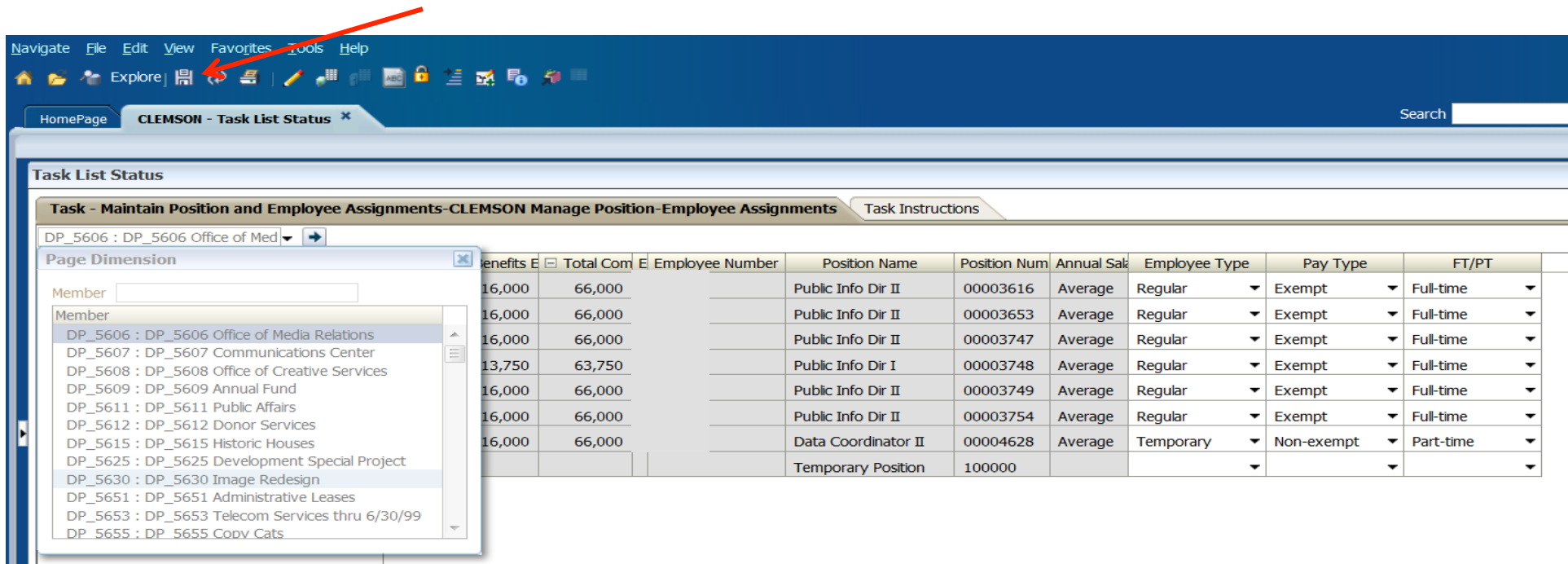
Human Capital Planning Department (Entity) Selection

A single department selection is necessary to begin individual employee record updates as shown below. Simply select the drop down box and enter the four digit home department number (not pay department), and select **Go**. 

This populates each employee record within the selected department. Note: additional information for each employee record can be viewed by scrolling to the right.

Information contained in white cells only, may be modified throughout Hyperion panels.

Yellow filled cells identify unsaved record information, and updates can be saved by selecting the save icon.



The screenshot displays the CLEMSON Task List Status application interface. A red arrow points to the 'Go' button in the department selection dropdown. The dropdown menu is open, showing a list of departments including 'DP_5606 : DP_5606 Office of Media Relations'. The main table displays employee records with columns for Employee Number, Position Name, Position Num, Annual Sal, Employee Type, Pay Type, and FT/PT. The table is partially populated with data for various positions, including Public Info Dir II and Data Coordinator II.

Employee Number	Position Name	Position Num	Annual Sal	Employee Type	Pay Type	FT/PT
16,000	Public Info Dir II	00003616	Average	Regular	Exempt	Full-time
16,000	Public Info Dir II	00003653	Average	Regular	Exempt	Full-time
16,000	Public Info Dir II	00003747	Average	Regular	Exempt	Full-time
13,750	Public Info Dir I	00003748	Average	Regular	Exempt	Full-time
16,000	Public Info Dir II	00003749	Average	Regular	Exempt	Full-time
16,000	Public Info Dir II	00003754	Average	Regular	Exempt	Full-time
16,000	Data Coordinator II	00004628	Average	Temporary	Non-exempt	Part-time
	Temporary Position	100000				

Human Capital Planning (HCP) Employee Record Updates

To update individual employee records, right click on **position** and choose **Go To Assignment** on the pop-up menu.

The screenshot displays the 'Task List Status' window for 'CLEMSON - Task List Status'. The main task is 'Maintain Position and Employee Assignments-CLEMSON Manage Position-Employee Assignments'. The current scenario is 'Budget', the current stage is 'Stage 1', and the current year of view is 'FY15'. The selected position is 'DP_5606 : DP_5606 Office of Med' and the selected employee is 'PS_00003748 : 00003748 - Public'.

Salary and Benefits

E Employee Number	Position Name	Position Number	Override Option Val	Salary Amount	Basic Salary Expens	Benefits Expense	Total Compensat	Benefit Program	Benefit Amount	Annual Salary Sprea
	Public Info Dir I	00003748		50,000	50,000.00	13,750	63,750.00	9MO	27.5	Average

Allocations

	Percentage Allocation	Allocated Flat Amount	Allocated Expense	Fund Segment	Entity Segment	Account Segment	Program Segment	Class Segment	Project Segment
1st Allocation	34		34,000	FD_15	DP_5606	AC_CLASS_PLAN	PG_INSSP_PLAN	CL_130	PJ_1500000
2nd Allocation	33		33,000	FD_16	DP_5601	AC_CLASS_PLAN	PG_AUXIL_PLAN	CL_155	PJ_1600012
3rd Allocation	33		33,000	FD_16	DP_5601	AC_CLASS_PLAN	PG_AUXIL_PLAN	CL_155	PJ_1600012
Percentage Allocation Assignments	100		100,000						

Specific Employee Record Updates: (white cells only)

Salary amounts, Annual salary spread (Average, 9 months, Summer Pay), and Chartfield strings are to be updated at this time.

Saving information will automatically update total compensation in the **Salary & Benefits Section** (highlighted above) as well as calculate the allocated expense column in the **Allocations Section** (highlighted above). **Note: You must save Salary and Benefit information first before editing the Allocations section.**

Note: Users may manually update the allocated expense column by right clicking anywhere in the **Allocations Section** (highlighted above) and selecting **Add (Delete) Allocation Information**.

HCP: Add Allocation/Chartfield Distribution To Existing Employee Record

In adding a Chartfield string, right click in BOTTOM row “Percentage Allocations Assignments” *or* “Flat Allocation Assignments” which refers to employee allocation type (flat equals dollar amount vs. a percentage spread). Note: Selecting any row other than listed above will result in an error message

The screenshot shows the Oracle Enterprise Performance Management System Workspace, Fusion Edition. The main window displays the 'Task List Status' for 'CLEMSON - Task List Status'. The task is 'Maintain Position and Employee Assignments-CLEMSON Manage Position-Employee Assignments'. The current scenario is 'Budget', the current stage is 'Stage 1', and the current year of view is 'FY15'. The table shows employee assignments with columns for Position Name, Position Number, Salary Amount, Basic Salary Expense, Benefits Expense, Total Compensation, Benefit Program, and Benefit Amount. A context menu is open over the 'Percentage Allocation Assignments' row, showing options like 'Add Allocation Information', 'Delete Allocation Information', 'Spread Allocations', 'Edit', 'Adjust', 'Comments', 'Supporting Detail', 'Show Change History', 'Document Attachments', 'Lock/Unlock Cells', 'Filter', 'Sort', and 'Select All'. The 'Percentage Allocation Assignments' row is highlighted in red.

Position Name	Position Number	Salary Amount	Basic Salary Expense	Benefits Expense	Total Compensation	Benefit Program	Benefit Amount
Dir I	00003748	60,000	60,000	16,500	76,500	9MO	27.5

Amount	Allocated Expense	Fund Segment	Entity Segment	Account Segment	Program Segment	Class Segment	Project Segment
	20,400	FD_15	DP_5606	AC_CLASS_PLAN	PG_INSSP_PLAN	CL_130	PJ_1500000
	19,800	FD_16	DP_5601	AC_CLASS_PLAN	PG_AUXIL_PLAN	CL_155	PJ_1600012
	19,800	FD_16	DP_5601	AC_CLASS_PLAN	PG_AUXIL_PLAN	CL_155	PJ_1600012
	60,000						

Shortcut: To eliminate selecting each chartfield string member, you can copy allocation distributions by using keystrokes Ctrl + C to copy the populated chartfield string and Ctrl + V to paste into a new allocation line.

After selecting **Add Allocation Information** from pop up menu, the appropriate allocation type must be chosen. Next, fill in corresponding percentage or flat dollar amount, then click **ADD**.

Prompt Text	Value
* Allocation Type	"Percentage Allocation Assignments"
Enter Allocation Percentage	if percentage is used, enter % here
Enter Allocated Flat Amount	if flat allocation is used, enter flat amount here

Add Cancel

HCP: Delete Allocation/Chartfield Distribution On Existing Employee Record

Right click on specific allocation row to delete and select **Delete Allocation Information**

Note: Error message will display if:

Percentage Allocation Type: Allocation total is greater than 100%

Flat Allocation Type: Allocation total is less than or greater than the allowed salary amount

☐ Allocations

	Percentage Allocation	Allocated Flat	Allocated Expense	Fund Segment	Entity Segment	Account Segment	Program Segment	Class Segment	Project Segment	Allocation Validation
1st Allocation	34		20,400	FD_15 ▼	DP_5606 ▼	AC_CLASS_PLAN ▼	PG_INSSP_PLAN ▼	CL_130 ▼	PJ_1500000 ▼	
2nd Allocation	33		19,800	FD_16 ▼	DP_5601 ▼	AC_CLASS_PLAN ▼	PG_AUXIL_PLAN ▼	CL_155 ▼	PJ_1600012 ▼	
3rd Allocation	33		19,800	FD_16 ▼	DP_5601 ▼	AC_CLASS_PLAN ▼	PG_AUXIL_PLAN ▼	CL_155 ▼	PJ_1600017 ▼	
4th Allocation	10			▼	▼	▼	▼	▼	▼	
☐ Percentage Allocation Assignments	110		60,000							
Validation Message										Assignment has over 100% Allocation

HCP: Add Vacant Position

From the **Maintain Position & Employee Assignments** form, right click and select **Add Position**.

ORACLE® Enterprise Performance Management System Workspace, Fusion Edition

Logged in as ethoma3 | Help | Log Off

Navigate File Edit View Favorites Tools Help

Explore

HomePage CLEMSON - Task List Status

Search Advanced

Task List Status

Task - Maintain Position and Employee Assignments-CLEMSON Manage Position-Employee Assignments Task Instructions

DP_5606 Office of Media Relations

	Basic Salary Expense	Benefits Expense	Total Compensation	Employee	Position Name	Position Number	Annual Salary	Employee Type	Pay Type	FT/PT
00003616 - Public Info Dir II	60,000	19,200	79,200		Public Info Dir II	00003616	Average	Regular	Exempt	Full-time
00003653 - Public Info Dir II	60,000	16,000	66,000		Public Info Dir II	00003653	Average	Regular	Exempt	Full-time
00003747 - Public Info Dir II			66,000		Public Info Dir II	00003747	Average	Regular	Exempt	Full-time
00003748 - Public Info Dir I			76,500		Public Info Dir I	00003748	Average	Regular	Exempt	Full-time
00003749 - Public Info Dir II			66,000		Public Info Dir II	00003749	Average	Regular	Exempt	Full-time
00003754 - Public Info Dir II			66,000		Public Info Dir II	00003754	Average	Regular	Exempt	Full-time
00004628 - Data Coordinator			66,000		Data Coordinator II	00004628	Average	Temporary	Non-exempt	Part-time

Go to Assignment
Assign Employee
Add Position
Delete Position Across All Versions
Edit
Adjust
Comments
Supporting Detail
Show Change History
Document Attachments
Lock/Unlock Cells
Filter
Sort
Select All

Complete Previous Incomplete Previous Next Incomplete Next Task List Home

Enter position title, eight digit position number (Begin the Position Number with the four digit dept. number where the position resides followed by a four digit number using a sequential numbering format), and default job. Follow previous instructions for entering salary, benefit and Chartfield allocation information (pg. 10). Click **ADD**.

Runtime Prompts - Add Position

Prompt Text	Value
* Enter Position Name	Enter Position Title Here (ie: Admin Assistant, Student Pool)
* Enter Position Number	56060001
* Select Job	Default_Job

HCP: Add To-Be-Hired Employee

From the **Maintain Position & Employee Assignments** form, right click and select **Assign Employee**, then **Assign To-Be-Hired Employee**.

Note: This action will be tied to a specific employee; create a vacant position first, then designate this position as “To Be Hired”

The purpose of utilizing the To Be Hired functionally is to further ensure an accurate budget. By only budgeting partial year compensation based on projected start dates, budget vs. actual variances will decrease. You will also have more funds available to budget for non-compensation items.

The screenshot displays the 'CU_PLAN Manage Position-Employee Assignments' form. A table lists various positions with columns for Position Name, Position Number, Annual Salary Spread, and Employee Type. A right-click context menu is open over the table, showing options such as 'Go to Assignment', 'Assign Employee', 'Add Position', 'Delete Position', 'Delete Position Across All Versions', 'Spread Allocations', 'Edit', 'Adjust', 'Comments', 'Supporting Detail', 'Show Change History', 'Document Attachments', 'Lock/Unlock Cells', and 'Filter'. The 'Assign Employee' option is highlighted, and a sub-menu is visible with 'Assign Existing Employee' and 'Assign To-Be-Hired Employee' options. The 'Assign To-Be-Hired Employee' option is selected. In the background table, the 'Vacant' position is circled in red.

	B	B	E	E	Position Name	Position Number	Annual Salary Spread	Employee Type	
Henders	00003473	- Ac	6	2	5	Accounting/Fiscal Mgr I	00003473	Average	Regular
Robbins	00003475	- Ac	8	2	1	Accounting/Fiscal Mgr II	00003475	Average	Regular
Wetzel	00003477	- Ac	1	1	1	Student Svcs	00003477	Average	Regular
Simpson	00003478	- Ac	1	1	1		00003478	Average	Regular
Richard	00003480	- Ac	1	1	1		00003480	Average	Regular
Pruitt, R	00003481	- Ac	1	1	1		00003481	Average	Regular
Chambers	00003485	- Ac	1	1	1		00003485	Average	Regular
Litzenberger	00003487	- Ac	1	1	1		00003487	Average	Regular
Smith, A	00003559	- Ac	1	1	1		00003559	Average	Regular
Chai, Sh	000036198	- Ac	1	1	1		000036198	Average	Regular
Gracia, M	000037834	- Ac	1	1	1		000037834	Average	Temporary
Queen, K	000039183	- Ac	1	1	1		000039183	Average	Temporary
And, The	0000370001	- Ac	1	1	1		0000370001	Average	Temporary
Vacant	0000370002	- Ac	1	1	1		0000370002	Average	Regular

HCP: To be Hired Instructions

Note: A new line will appear above the newly created vacant position. This is NOT a duplication. You will add salary and benefit information to the To Be Hired position only.

Runtime Prompts - Assign To-Be-Hired Employee

Prompt Text	Value
* Enter Employee Name	John Doe
* Enter Employee Number	000123
* Select FT/PT	Full-time
* Select Pay Type	Exempt
* Select Employee Type	Regular
* Enter Hire Date	1/1/15

Assign **Cancel**

Task - Maintain Position and Employee Assignments-CU_PLAN Manage Position-Employee Assignments Full Form Task Instructions

CU_PLAN Manage Position-Employee Assignments Full Form > Manage Assignments

Current Scenario: Budget Current Stage: Stage 1

DP_5307 Student Financial Services To be Hired 26 New Position 5

Salary and Benefit

Employee Name	Employee Number	Position Name	Position Number	Salary Amount	Basic Salary Expense	Benefits Expenses	Total Compensation	Benefit Program	Benefit Amount	Annual Salary Spread
John Doe	000123	Acct/Fiscal Analyst III	53070001	50,000	25,000.00	8,500	33,500.00	STA	34	Average

The screen shot above shows a projected hire date of 1/1/15. HCP automatically adjusts the salary amount to capture only the salary & benefit expense of the time to be worked in the fiscal year. In this example, the basic salary expense is calculated at 50% of the salary amount, representing the employee working half of the fiscal year (Jan 1 to June 30). The adjusted basic salary expense carries down to the Allocation section.

Allocations

	Percentage Allocation	Allocated Flat Amount	Allocated Expense	Fund Segment	Entity Segment	Account Segment	Program Segment	Class Segment	Project Segment
1st Allocation	100.000		25,000	FD_15	DP_5307	AC_CLASS_PLAN	PG_INSSP_PLAN	CL_130	PJ_1500000
Percentage Allocation Assignments	100.000		25,000						

HCP: Terminate Employee Salary & Benefits

To terminate an employee in HPC, Zero out salary dollars in the Salary & Benefits section and SAVE. **Note: It is important that no employee record is deleted.**

Task - Maintain Position and Employee Assignments-CLEMSON Manage Position-Employee Assignments Task Instructions

CLEMSON Manage Position-Employee Assignments > Manage Assignments

Current Scenario: Budget Current Stage: Stage 1 Current Year of View: FY15

DP_5606 Office of Media Relations 00003748 - Public Info Dir I

Salary and Benefits

Employee Name	Employee Number	Position Name	Position Number	Salary Amount	Basic Salary Expense	Benefits Expense	Total Compensation	Benefit Program	Benefit Amount
		Public Info Dir I	00003748	0	0		0	9MO	27.5

Allocations

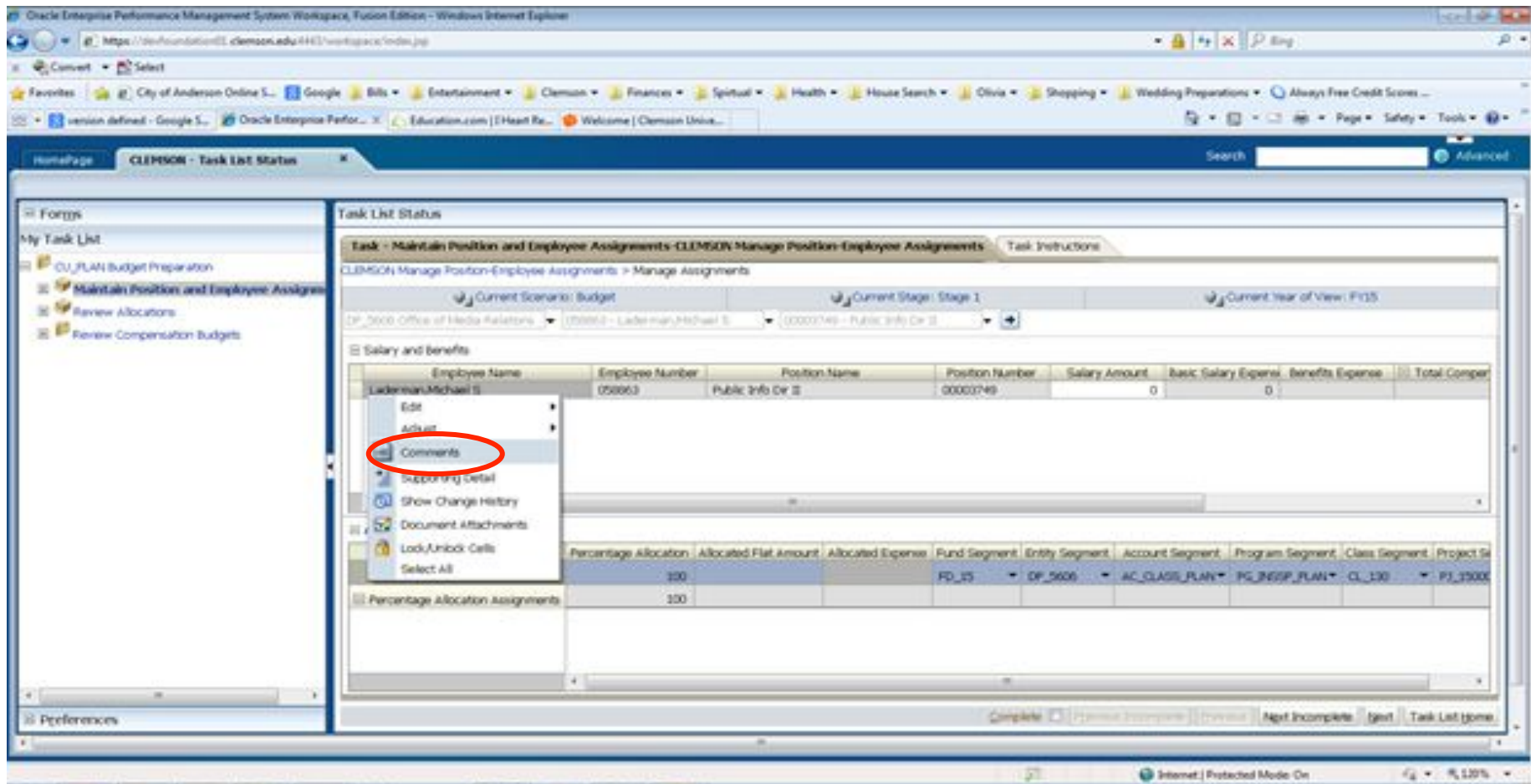
	Percentage Allocation	Allocated Flat Amount	Allocated Expense	Fund Segment	Entity Segment	Account Segment	Program Segment	Class Segment	Project Segment
1st Allocation	34			FD_15	DP_5606	AC_CLASS_PLAN	PG_INSSP_PLAN	CL_130	PJ_1500000
2nd Allocation	33			FD_16	DP_5601	AC_CLASS_PLAN	PG_AUXIL_PLAN	CL_155	PJ_1600012
3rd Allocation	33			FD_16	DP_5601	AC_CLASS_PLAN	PG_AUXIL_PLAN	CL_155	PJ_1600017
Percentage Allocation Assignments	100								


Note: Zero budgets will not be created in non-compensation budget development by having empty allocation rows (as shown above).

NEVER LEAVE “PERCENTAGE ALLOCATION” OR “ALLOCATED FLAT AMOUNT” BLANK. IF YOU DON’T WANT THE ROW, DELETE IT.

HCP: Adding Comments to Employee Records

Within the **Manage Assignments** form, right click on employee name, select **Go To Assignment**, then right click within the Salary and Benefit section or the Allocation section and select **Comments**.



Select the green plus sign  on the Comment window to add detail to employee record and click ADD. Once a comment is added, a triangle will appear in the employee name cell in the Salary and Benefit section or the Allocation spread (% or Flat) cell in the Allocation section.

HCP: Review Position Budgets

Select **Review Allocations** under **My Task List** for final review of updated HCP budgets. Note: Data may be viewed by department or by budget center. Click on **uvDepartment** (circled below) and choose an individual department or budget center.

Task List Status

Task - Review Allocations-Review Allocations Task Instructions

Allocations

Allocation Review_Existing Allocation Review_New

Current Scenario: Budget Current Stage: Stage 1 Current Year of View: FY15 uvDepartment: DP_A+A

			Fund Segr	Entity Segme	Account Segme	Program Segment	Class Segme	Project Segme	Percentage	Allocated
DP_5601 VP for Advancement	0 00003696 - Academic P	1st Allocation	FD_15	DP_5601	AC_UCLASS_P	PG_INSSP_PLAN	CL_130	PJ_1500000	100	
	0 00003697 - Administrat	1st Allocation	FD_15	DP_5601	AC_CLASS_PL	PG_INSSP_PLAN	CL_130	PJ_1500000	100	
DP_5602 Development	0 00000171 - Extension A	1st Allocation	FD_15	DP_0136	AC_UCLASS_P	PG_INSSP_PLAN	CL_126	PJ_1500000	25	
		2nd Allocation	FD_15	DP_0136	AC_UCLASS_P	PG_INSSP_PLAN	CL_130	PJ_1500000	45	
		3rd Allocation	FD_15	DP_0136	AC_UCLASS_P	PG_RESCH_PLAN	CL_126	PJ_1530001	20	
		4th Allocation	FD_15	DP_0136	AC_UCLASS_P	PG_RESCH_PLAN	CL_126	PJ_1530002	10	
	0 00000442 - Asst Acader	1st Allocation	FD_15	DP_5602	AC_UCLASS_P	PG_INSSP_PLAN	CL_130	PJ_1500132	100	

Member Selection

Dimensions Entity

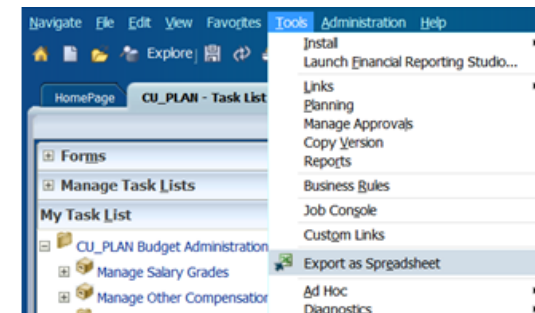
Members Variables

Member Name

- Entity
 - Unspecified Entity
 - Generic Entity
 - Total Entity
- DP_ALL_ORGS_2012_07_01
 - DP_ALL
 - DP_A+A ← Select budget center
 - DP_A+A_PLAN
 - DP_5600
 - DP_5601 ← Select department
 - DP_5602
 - DP_5603
 - DP_5604
 - DP_5605
 - DP_5606
 - DP_5607

When you click on uvDepartment, the member selection box appears. To select an individual department, select the desired department number and use blue arrow to move across into the right panel and click OK. Follow the same steps to select an entire budget center for review.

The Review Allocation data may be exported to Excel. From Menu options choose **Tools**, then **Export as Spreadsheet**



HCP: Review Compensation Budgets

Task List Status

Task - Review Position Budgets-Position

DP_5606 Office of Media Relations

	YearTotal
All Positions	590,960.10

Task List Status

Task - Review Employee Budgets-Emp

DP_5606 Office of Media Relations

	YearTotal
Total Employees	590,960.10

Users can review compensation budget totals by department by selecting **Review Compensation Budgets** under **My Task List**. There are three review options for compensation budgets: by position, by employee, and by element. Each option allows users to drill in and out by using the expand/collapse buttons.

Task List Status

Task - Review Element Budgets-Element Expenses for each Period - Elements on

DP_5606 Office of Media Relations

	YearTotal
00003616 - Public Info Dir II	Total Compensation Expenses 94,101.50
00003653 - Public Info Dir II	Total Compensation Expenses 93,167.52
00003747 - Public Info Dir II	Total Compensation Expenses 106,854.28
00003748 - Public Info Dir I	Total Compensation Expenses 80,420.10
00003749 - Public Info Dir II	Total Compensation Expenses 87,100.00
00003754 - Public Info Dir II	Total Compensation Expenses 92,486.80
00004628 - Data Coordinator II	Total Compensation Expenses 36,829.90
All Positions	Total Compensation Expenses 590,960.10

HCP: Employee Search

Users have the ability to search for an individual employee using the **Employee Search** option located under **My Task List**. Select **uvEmployee** (circled below) to bring up employee member selection box.

The screenshot shows the 'Task List Status' window. On the left, under 'My Task List', the 'Employee Search' option is highlighted with a red box. On the right, the 'Task - Employee Search-CU_PLAN Employee Search' tab is active. The 'Employee:' field is empty, and the 'uvEmployee: EP_059409' field is circled in red. Below these fields is a table with columns: Salary Amount, Employee Name, Employee Number, Position Name, Position Number, Annual Salary Spread, and Termination Date. The table contains one row with the following data: 00007468 - Eng/Assoc Eng III, DP_5952 Univ Fac:Capital Projects, [redacted], No Position, 00007468, Average, and Termination Date.

The screenshot shows the 'Member Selection' dialog box. The 'Dimensions' dropdown is set to 'Employee'. The search criteria is '*AnyPartOfName*'. The search results are displayed in the left panel under the 'Alias' tab, showing 'Employee' and 'Total Employees'. The 'Add' button is circled in red. A red arrow points to the search criteria field with the text: 'Make sure "ALIAS" is selected; this will allow users to search by employee name and employee number.' The 'OK' button is also circled in red.

When you click on uvEmployee, the employee member selection box appears. Type part of the employee name you are searching for flanked by *'s (these asterisks act as wildcards) and click the magnifying glass icon. The search results will populate in the left panel. To choose desired employee simply double click on the employee name or select employee and move across to left panel with add arrow and select OK. Users may go directly into employee record from this point using *Go To Assignment* function (pg. 10).

HCP: Attaching Documentation & Comments

You have the ability to attach documents to positions in HCP, note that the document must be uploaded into Hyperion before you can attach it (upload functionality is currently limited to the Budget Office). Please work with your budget office liaison on any documentation you wish to upload and attach in HCP.

In addition you can add Comments to positions in HCP. Best practices is that you add the Comment to the Position number field.

HCP: Hyperion Hints

The arrows circled below can expand your view of the HCP forms.

The screenshot displays the Hyperion HCP interface. At the top, there is a navigation bar with menus like 'Navigate', 'File', 'Edit', 'View', 'Favorites', 'Tools', and 'Help'. Below this, a search bar and a 'View' button are visible. The main content area is divided into two panels. The left panel, titled 'Forms', contains a 'My Task List' section with a tree view showing tasks like 'CU_PLAN Budget Preparation', 'Maintain Position and Employee Assignments', 'Review Allocations', and 'Review Compensation Budgets'. The right panel, titled 'Task List Status', shows a 'Task List Status - All' section with a 3D pie chart indicating 'Incomplete, 100.0%'. Below the chart is a 'Task List Tasks - All' table with columns for Task, Type, Status, Due Date, Alert, Completed Date, Instructions, and Action. The table lists several tasks, including 'CU_PLAN Budget Preparation', 'Maintain Position and Employee Assignments', 'Review Allocations', 'Review Compensation Budgets', 'Review Position Budgets', 'Review Employee Budgets', and 'Review Element Budgets'. Two red circles highlight specific UI elements: one around the 'View' button in the top right corner and another around a small arrow icon in the bottom left corner of the task list table.

Task	Type	Status	Due Date	Alert	Completed Date	Instructions	Action
CU_PLAN Budget Preparation							
Maintain Position and Employee Assignments							
Review Allocations							
Review Compensation Budgets							
Review Position Budgets							
Review Employee Budgets							
Review Element Budgets							

Unsaved Data: If you have unsaved data (yellow cells), and you DO NOT wish to save the changes, simply exit the form and begin again if needed.

Sorting Employee Data: On the Maintain Position & Employee Assignments panel, right click on the column headings (i.e.: employee name, position number, etc.), click Sort, and choose sort option.

Addendum A: Benefit Program Code Table

Pooled Fringe
Rates

Effective Date 07/01/2018

Personalize Find						First	1-21 of 21	Last
	Benefit Program	Description	Classified/Unclassified Indc	Fringe Pool Type	Fringe % Rate			
1	9MO	9 Month Regular FTE	Temporary ▼	9MO	0.337			
2	9MO	9 Month Regular FTE	Unclassifd ▼	9MO	0.337			
3	AT9	Temporary > 30	Temporary ▼	AT9	0.337			
4	ATP	Temporary > 30	Temporary ▼	ATP	0.403			
5	FED	Federal	Unclassifd ▼	12MO	0.403			
6	GRD	Graduate	NoPosn ▼	STDNT	0.120			
7	GST	Temporary	Grant ▼	12MO	0.403			
8	GST	Temporary	Time Limit ▼	12MO	0.403			
9	GT9	Temporary	Grant ▼	9MO	0.337			
10	GT9	Temporary	Time Limit ▼	9MO	0.337			
11	MSC	Miscellaneous	Unclassifd ▼	12MO				
12	MT9	Temp measure full	Temporary ▼	MT9	0.337			
13	MTP	Temp measure full	Temporary ▼	MTP	0.403			
14	NEL	Undergraduate	NoPosn ▼	STDNT	0.018			
15	STA	12 Month Regular FTE	Classified ▼	12MO	0.403			
16	STA	12 Month Regular FTE	Unclassifd ▼	12MO	0.403			
17	TLR	Permanent Regular	Classified ▼	PTMP	0.198			
18	TLR	Permanent Regular	Unclassifd ▼	PTMP	0.198			
19	TMP	Temporary	Time Limit ▼	PTMP	0.198			
20	TMP	Temporary	NoPosn ▼	PTMP	0.198			
21	TMP	Temporary	Temporary ▼	PTMP	0.198			

To report an issue:

Please send an email to ithelp@clermson.edu and include as the first line in the body of the email Assignees="BUD Solution Support". The subject line should be a brief description of the issue, with the details in the body after the Assignee. Screenshots and attachments can also be used. Alternatively you can call the Help Desk at (864) 656-3494 to assign a ticket to the BUD Solution Support team.

Links to Production (Not sure if we want to include the new view until we get some reports and dashboards delivered):

Hyperion Planning (old view)

<https://foundation01.clemson.edu:4443/workspace/index.jsp>

Hyperion Planning (new view)

<https://foundation01.clemson.edu:4443/HyperionPlanning/>

SmartView install instructions:

Instructions to install SmartView, if not already installed (this will require shutting down Office products and a possible reboot): <https://clermson.box.com/InstallSmartViewDoc>