
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
<ul style="list-style-type: none"> • Topic 1: Application architecture • Topic 2: Nightly position and employee refresh from HCM • Topic 3: Attrition and personnel buckets • Topic 4: Data map and rounding schedule 	
Module 3: Hyperion Basics	00:30
<ul style="list-style-type: none"> • Lesson 1: Logging into the application • Lesson 2: Hyperion Account Set Up • Lesson 3: Using member selectors • Lesson 4: Using data form point of views (POVs) • Lesson 5: Saving data to a data form 	
Module 4: Position and Employee Forms	00:30
<ul style="list-style-type: none"> • Lesson 1: Manage Employees by Department • Lesson 2: Manage Positions by Department • Lesson 3: Manage Single Employee • Lesson 4: Manage Single Position • Lesson 5: Personnel Details 	
Module 5: Position and Employee Modifications	02:00
<ul style="list-style-type: none"> • Lesson 1: Change Position from Full Time to Part Time • Lesson 2: Change Part Time FTE • Lesson 3: Change Position from Part Time to Full Time • Lesson 4: Change Position Max Headcount • Lesson 5: Move Position • Lesson 6: Sync Position with HCM • Lesson 7: Inactivate / Reactivate Position • Lesson 8: Add / Delete New Position • Lesson 9: Terminate / Reactivate Employee • Lesson 10: Update Accrued Balances • Lesson 11: Transfer Employee / Undo Employee Transfer • Lesson 12: Change Salary – Step • Lesson 13: Change Salary – Range • Lesson 14: Add / Delete Pay Component • Lesson 15: Add / Delete Executive Benefits 	

<ul style="list-style-type: none"> • Lesson 16: Update Retirement • Lesson 17: Update Allocation • Lesson 18: Set Attrition Rates • Lesson 19: Manage Department Allocation Defaults • Lesson 20: View HCM Refresh Flag 	0:40
Module 6: Personnel Buckets	
<ul style="list-style-type: none"> • Lesson 1: Manage Overtime Buckets • Lesson 2: Manage Seasonal and Temp Buckets • Lesson 3: Manage FTE Buckets 	0:25
Module 7: Review Personnel	
<ul style="list-style-type: none"> • Lesson 1: Review All Personnel Records • Lesson 2: Attrition Budget Impact Review • Lesson 3: PSTN Driven Account Review 	0:45
Module 8: Running Position Reports	
<ul style="list-style-type: none"> • 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 • Lesson 13: BAT Personnel Overrides • Lesson 14: BAT Attrition Impact Report - Detail • Lesson 15: BAT Attrition Impact Report - Summary 	0:15
Module 9: Personnel Current Year Forecast	
<ul style="list-style-type: none"> • Lesson 1: View Current Year Forecast 	0:10
Module 10: Course Summary	
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 and Logistics

To receive credit for completing this course, which is necessary to be granted system access for performing related tasks in Hyperion, participants must:

Stay logged into the Training Teams session

To get the most benefit from this course, participants should:

- 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 Objectives

At the conclusion of this course, participants will be able to:

- Understand big picture concepts related to the Hyperion personnel model
- Understand Hyperion end user functionality basics
- 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 2: Big Picture Items

Overview

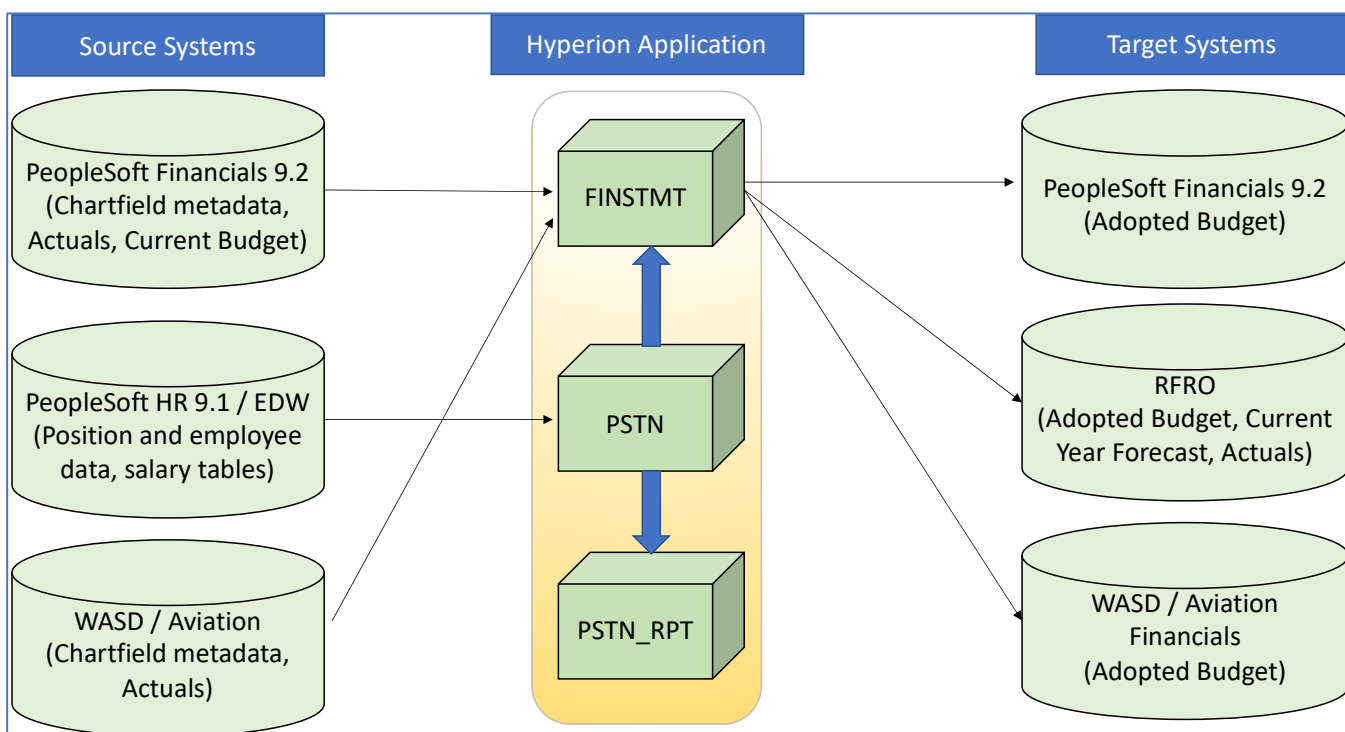
This module includes the following topics:

- Topic 1: Application architecture
- Topic 2: Nightly position and employee refresh from HCM
- Topic 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.

Task - Manage Positions by Department | Task Instructions

Years: FY22 | Scenario: Budget | Requests: B

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	Oct	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.

The screenshot shows the 'HCM Refresh Flag' task configuration. On the left, a navigation tree is visible with 'HCM Refresh Flag' selected. The main area shows the configuration for 'FN00000000 - FINANCE DEPART'. A red box highlights the 'Exclude Department from Nightly HCM Update' checkbox, which is checked, and the 'Yes' radio button is selected below it.

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

Task - Manage Overtime Buckets											
Scenario: Budget		Years: FY22		Requests: Base		Employee: EHPVacancy		Department User Variable: FN0000000 - FINANCE DEPARTMENT			
Working		Departments in Row								Departments in POV	
Overtime Type	Overtime Annual Amount	Allocated Fund	Allocated Grant	Allocated Project	Allocated Activity	Allocation Percent	Salary Amount	Other Compensation Amount	Total Compensation		
FN01010000 - D Overtime Bucket Regular Overtime Bucket	10,000	1001 - GENERAL FUND OPERATIONS	No_Grant	No_Project	No_Activity	100%	10,000	1,634	11,634		
FN01020000 - H Overtime Bucket 1											
FN01020000 - H Overtime Bucket 2											
FN01030000 - C Overtime Bucket 1											

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

Years: FY22		Scenario: Budget	
Budget Amount	Job Code	Position Description	Full Time / Part Time
96,885	Seasonal Bucket	Training Test	Temp / Seasonal

		Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	YearTotal
Temp Seasonal Bucket Salary	Salary Amount						20,000.00	20,000.00	20,000.00	20,000.00	10,000.00	90,000.00
Current Year Salary	Salary Amount						20,000.00	20,000.00	20,000.00	20,000.00	10,000.00	90,000.00
Total Salary	Total Compensation						20,000.00	20,000.00	20,000.00	20,000.00	10,000.00	90,000.00
Social Security Rate	Other Compensation Amount						1,240.00	1,240.00	1,240.00	1,240.00	620.00	5,580.00
Medicare Rate	Other Compensation Amount						290.00	290.00	290.00	290.00	145.00	1,305.00
Total Other Compensation	Total Compensation						1,530.00	1,530.00	1,530.00	1,530.00	765.00	6,885.00
Total Pay Element	Total Compensation						21,530.00	21,530.00	21,530.00	21,530.00	10,765.00	96,885.00

Based on Hours /
Month, Headcount and
Hourly Rate

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	
Personnel Management		Period: BegBalance	Years: FY22
Manage Personnel		Position: No_Position	Pay Element: No_PE
Manage Employees by Department			Budget Rate
Manage Positions by Department		FN01000000 - DIRECTOR'S OFFICE	
Manage Single Employee		FN02000000 - CONTROLLERS DIVISION	0.03
Manage Single Position		FN03000000 - FIN BUSINESS SOLUTIONS SUPPORT	
Manage Overtime Buckets		FN04000000 - BOND ADMINISTRATION DIVISION	
Manage Seasonal and Temp Buckets		FN05000000 - CASH MANAGEMENT DIVISION	
Attrition Rates		FN06000000 - TAX COLLECTOR'S DIVISION	
HCM Refresh Flag		FN07000000 - FIN, COMPLIANCE & ADMIN DIV	
Manage Department Allocation Defaults		FNCP000000 - FINANCE CAPITAL	
Review Personnel		FN00000000 - FINANCE DEPARTMENT	0.04
Operating Preparation			
Expanded Requests			

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:

- Lesson 1: Logging into the application
- Lesson 2: Hyperion Account Set Up
- Lesson 3: Using member selectors
- Lesson 4: Using data form point of views (POVs)
- Lesson 5: Saving data to a data form

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

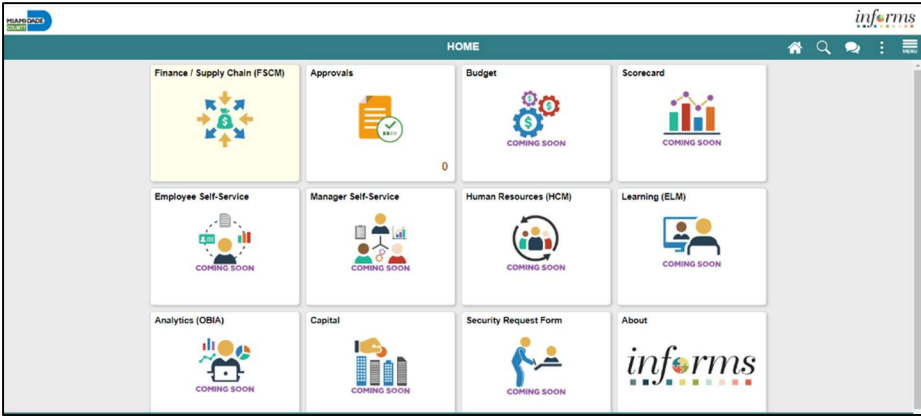
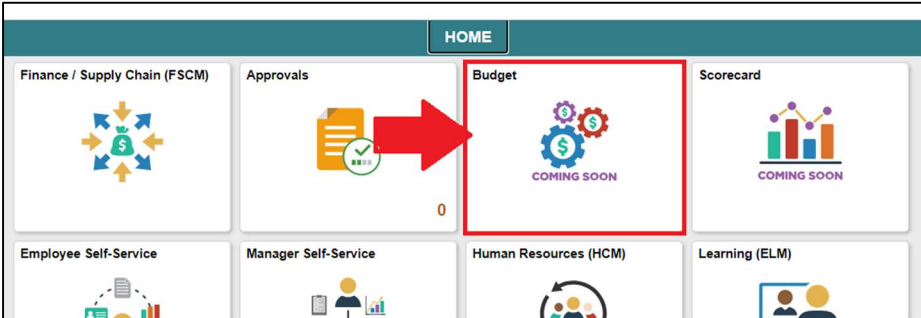
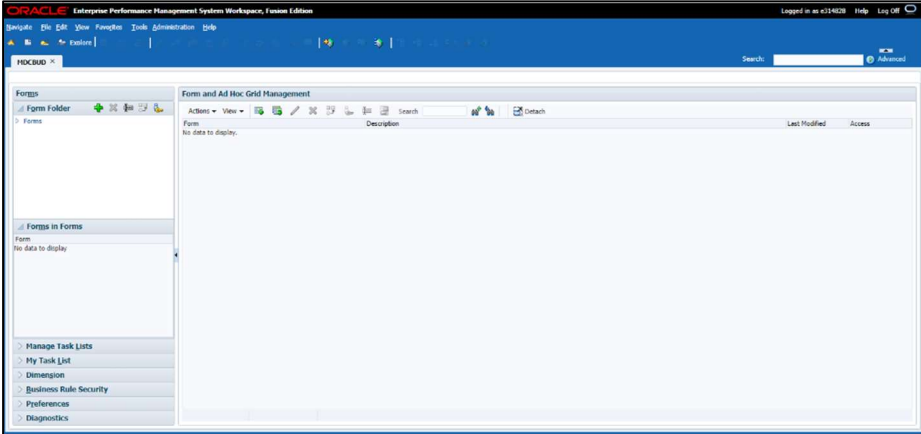
Lesson

This lesson will guide users through the steps to log into the application.

Overview

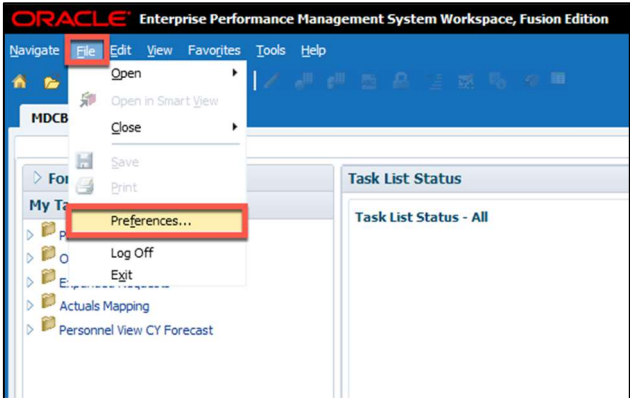
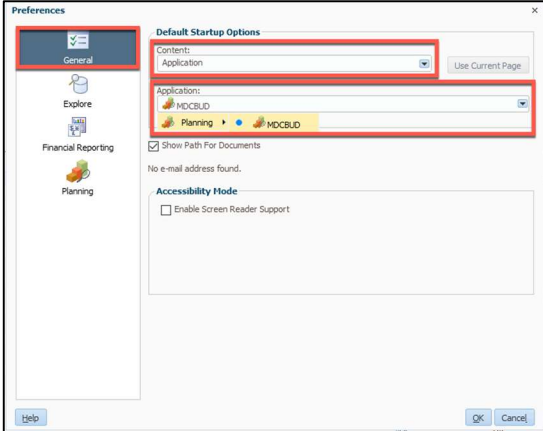
In this lesson
you will learn:

- Navigate to the portal
- Log into Hyperion with your user eKey and password

Step	Action	Notes
1	From Google Chrome or Microsoft Edge, enter the following URL, https://informsuat.miamidade.gov/ .	
2	<p>You will then arrive at the Single Sign On landing page shown below:</p>  <p>This page will have tiles that will allow you log into all INFORMS systems that you currently have access to.</p>	Please note that the Single Sign uses network credentials to log you into the system.
3	<p>You will then click on the Budget tile shown below:</p> 	
4	<p>After clicking on the tile shown above, INFORMS will automatically take you to the Hyperion home page shown below:</p>  <p>And you will have successfully logged into Hyperion.</p>	

Lesson 2: Hyperion Account Set Up

Lesson Overview	This lesson will guide users through the steps to set up their application settings, reporting settings, and user variable.
In this lesson you will learn:	<ul style="list-style-type: none">• Set the application as your home page• Set up your financial reporting preferences• Set up your department user variable

Step	Action	Notes
1	<p>To set the application to your home page, first click "File" in the toolbar, then select "Preferences" from the drop-down menu.</p> 	
2	<p>Ensure you have selected the "General" vertical tab, then using the drop-down menus, make the following selections: Content: "Application" Application: "MDCBUD"</p> 	
3	<p>To set Financial Reporting preferences, select the third vertical tab titled "Financial Reporting".</p>	
4	<p>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".</p>	

<p>5</p>	<p>To see these changes take place, click "Log Off" in the top right area of the screen.</p>	
<p>6</p>	<p>Log back in by entering your eKey and password and click "Log On".</p>	
<p>7</p>	<p>To set your Department user variable, select the arrow next to "Preferences" in the bottom left of your screen.</p>	
<p>8</p>	<p>Select the 4th horizontal tab titled "User Variable Options".</p>	
<p>9</p>	<p>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".</p>	


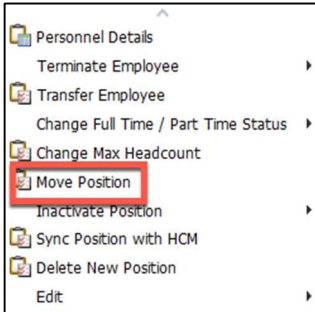

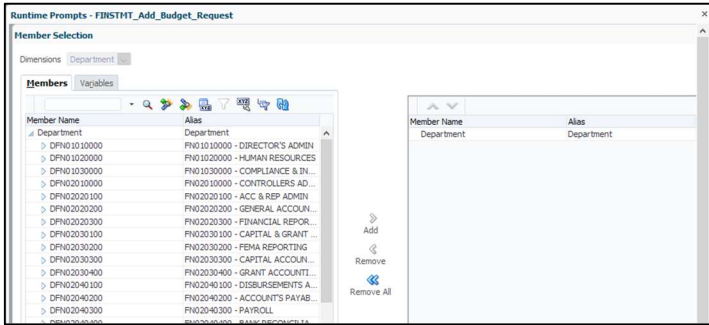
Lesson 3: Using Member Selectors

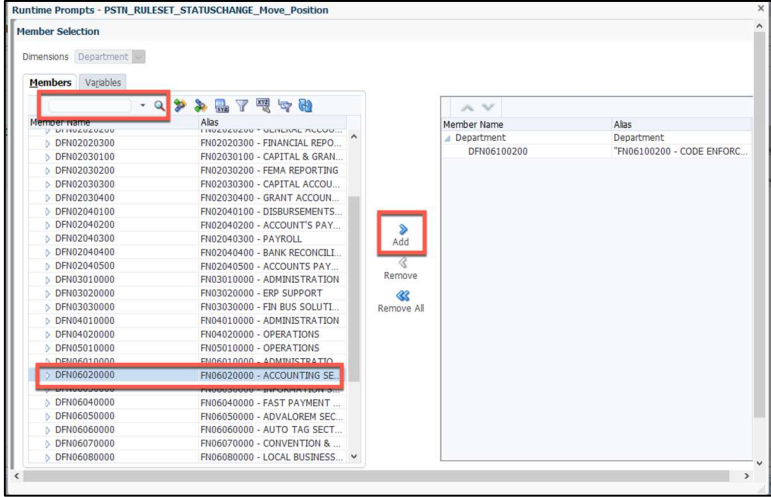
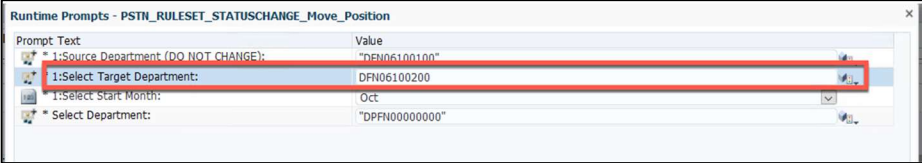
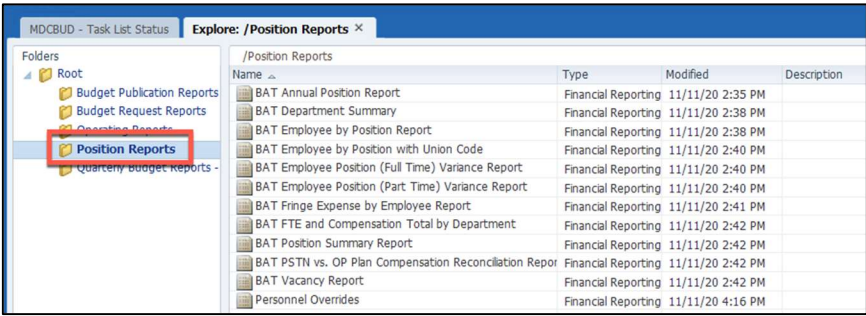
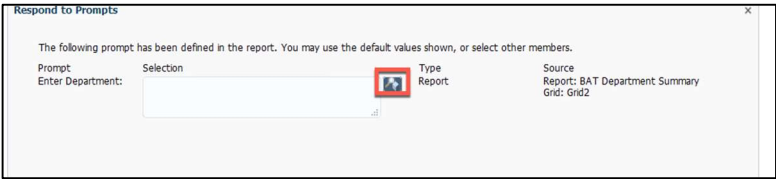
Lesson Overview

This lesson will guide users through the steps to open and use member selectors throughout the application.

In this lesson you will learn:

- Navigate to the Manage Expanded Requests form
- Use the member selector to select a member in a runtime prompt

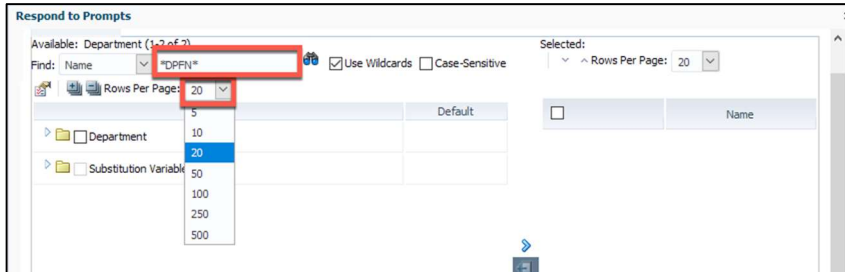
Step	Action	Notes
1	<p>Navigate to the Manage Expanded Requests form by going to My Task List → Position Management → Manage Single Position.</p> 	
2	<p>Right click on this form, then click “Move Position” from the right click menu. This will display a runtime prompt.</p> 	
3	<p>In the field that says “Select Target Department”, you can either type in the Department ID, or use the member selector to select your Department by clicking the member selector icon to the right of the input field. Click on the member selector icon.</p> 	
4	<p>The member selection window now displays a list of all the departments that you have access to.</p> 	

<p>5</p>	<p>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”.</p> 	<p>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</p>
<p>6</p>	<p>Now the “Enter Department” field displays with the department that you selected using the member selector.</p> 	<p>The member selector tool is useful when you are unsure of the exact dept ID number that you would like to select.</p>
<p>7</p>	<p>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.</p> 	
<p>8</p>	<p>Double click on the BAT Department Summary to open it—the prompt window will display.</p>	
<p>9</p>	<p>The first prompt entry, “Enter Department”, also has the member selector icon next to the text box. Click on the member selector icon.</p> 	

10

This member selector is a little different in these ways:

1. The default rows per page is set to 20 rows at first. To change this, click on the drop-down arrow and change the number to a larger amount.
2. If you want to search for a department and don't spell out the whole name, you will need to put wild cards (asterisks *) before and after the search criteria.



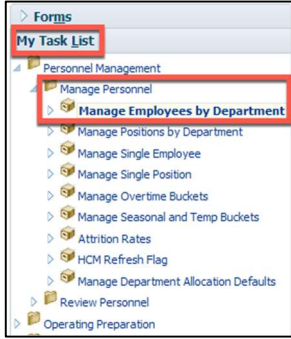
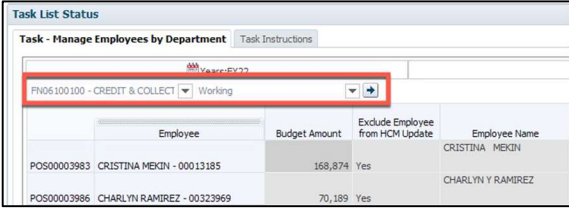
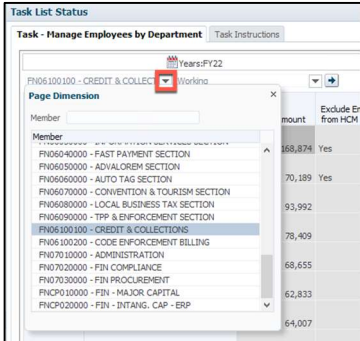
Lesson 4: Using Data Form Point of Views (POVs)

Lesson Overview

This lesson will guide users through the steps to change the Point of View (POV) on a data form.

In this lesson you will learn:

- Navigate to a form that utilizes the point of view feature
- Change the point of view on a data form

Step	Action	Notes
1	<p>Navigate to the Manage Employees by Department form by going to My Task List → Personnel Management → Manage Personnel → Manage Employees by Department.</p> 	
2	<p>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.</p> 	
3	<p>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.</p> 	
4	<p>Select a new Department member from the drop-down list, then click the “Go” arrow to save your POV selection.</p>	<p>After changing your POV, you must click the “Go” arrow to save your changes.</p>

Task List Status

Task - Manage Employees by Department Task Instructions

Years: FY22

FN07010000 - ADMINISTRATIOI Working

Page Dimension

Member	Amount	Exclude from H
FN02030100 - CAPITAL & GRANT ADMIN	168,874	Yes
FN02030200 - FEMA REPORTING		
FN02030300 - CAPITAL ACCOUNTING	70,189	Yes
FN02030400 - GRANT ACCOUNTING		
FN02040100 - DISBURSEMENTS ADMIN		
FN02040200 - ACCOUNTS PAYABLE	93,992	
FN02040300 - PAYROLL		
FN02040400 - BANK RECONCILIATION	78,409	
FN02040500 - ACCOUNTS PAYABLE WORKFLOW		
FN03010000 - ADMINISTRATION	68,655	
FN03020000 - ERP SUPPORT		
FN03030000 - FIN BUS SOLUTIONS APP SUPPORT	62,833	
FN04010000 - ADMINISTRATION		
FN04020000 - OPERATIONS	64,007	

5 After hitting the "Go" arrow, you will now see that the form renders to display data for the selected dimension(s) in the POV.

Task - Manage Employees by Department Task Instructions

Years: FY22 Scenario: Budget Request: Base

FN02040400 - BANK RECONCILIATION Working

	Budget Amount	Employee Name	Position Description	Full Time / Part Time	FTE	Job Code	Salary Grade	Step	Pay Anniversary Date	Longevity Date	Longevity Years
POS00003819	150,861	LOURDES C JALLEN	FINANCE SECTION ASSISTANT MGR	Full Time	1.00	FINANCE SECTION ASSISTANT MGR - 000333	S0000333	10	1/4/16	11/24/03	16.00
POS00003846	69,980	TORINEA J LAWSON	ACCOUNT CLERK	Full Time	1.00	ACCOUNT CLERK - 000310	S0000310	10	11/20/17	10/2/00	20.00
POS00003847	89,948	LISA QUINTANA	CLERK 4	Full Time	1.00	CLERK 4 - 000013	S0000013	12	3/26/18	4/2/91	29.00
POS00003848	73,697	MARLA C SMITH	ACCOUNT CLERK	Full Time	1.00	ACCOUNT CLERK - 000310	S0000310	11	11/23/15	4/16/90	29.00
POS00003849	79,317	BRIDGET NUNEZ	ACCOUNT CLERK	Full Time	1.00	ACCOUNT CLERK - 000310	S0000310	13	9/24/18	12/26/89	27.00
POS00003850	84,981	JUANI E RUIZ	ACCOUNTANT 1	Full Time	1.00	ACCOUNTANT 1 - 000315	S0000315	6	2/24/20	10/6/14	4.00
POS00003852	108,096	JOHNSON V LE	ACCOUNTANT 2	Full Time	1.00	ACCOUNTANT 2 - 000316	S0000316	7	11/18/19	5/2/11	8.00
POS00003853	128,090	ANNI M ABEL	ACCOUNTANT 2	Full Time	1.00	ACCOUNTANT 2 - 000316	S0000316	12	7/31/17	2/20/90	30.00
POS00015233	46,451	OMAR E MACHADO	ACCOUNTANT 2	Part Time	0.74	ACCOUNTANT 2 - 000316	S0000316	2	6/19/20	8/11/99	3.00
-	Total										

Lesson 5: Saving Data to a Data Form


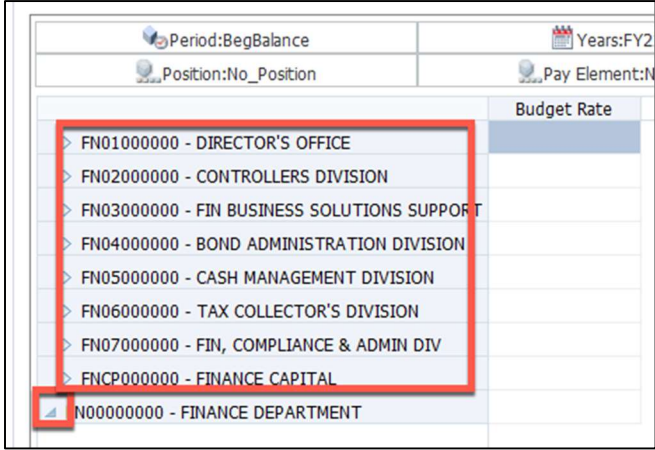
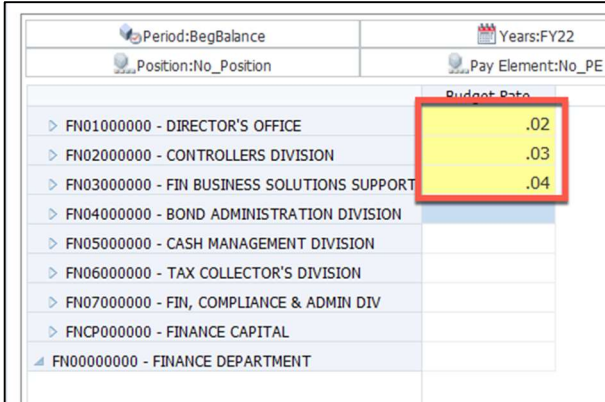
Lesson

This lesson will guide users through the steps to enter and save data on a data form.

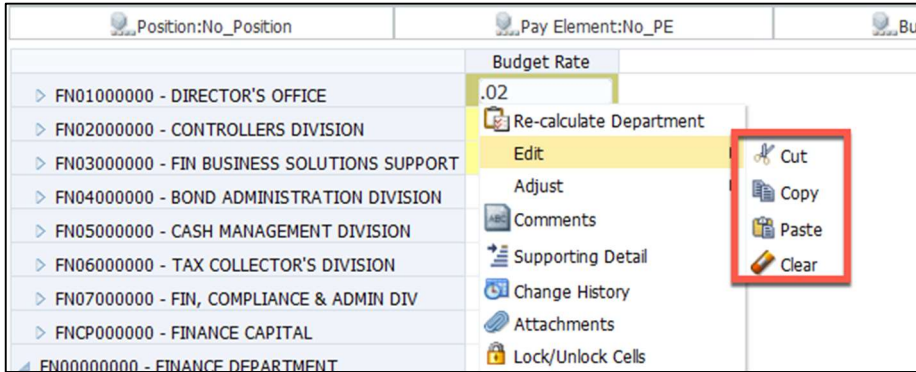
Overview

In this lesson you will learn:

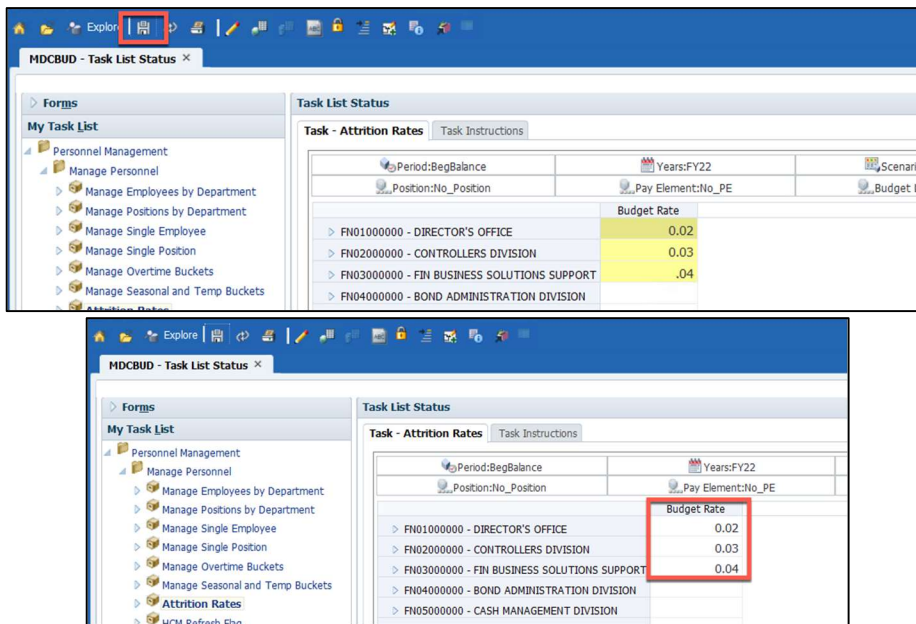
- Navigate to a writeable form where users can enter and save data
- Enter data to a data form
- Save the data you entered to the form

Step	Action	Notes
1	<p>Navigate to the Expense Input – ChartFields in Row form by going to My Task List ->Personnel Management ->Manage Personnel ->Attrition Rates.</p> 	
2	<p>Expand the form until you see your divisions</p> 	
3	<p>Click in a white cell and begin typing in a number to enter data at that intersection. After typing in an amount, the cell color will change from white to yellow, signifying that the data has not yet been saved.</p> 	<p>White cells signify a writeable cell, while gray cells signify that they are read-only.</p>

4 Right click the cell and select Edit from the menu to view additional options including Cut, Copy, Paste and Clear.



5 Click the "Save" icon in the upper left corner of the screen to save your changes. A message will display indicating that the data has been saved and the entered cell will turn from yellow back to white.



Module 4: Position and Employee Forms

Overview

This module includes the following lessons:

- Lesson 1: Manage Employees by Department
- Lesson 2: Manage Positions by Department
- Lesson 3: Manage Single Employee
- Lesson 4: Manage Single Position
- 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

Lesson 1: Manage Employees by Department

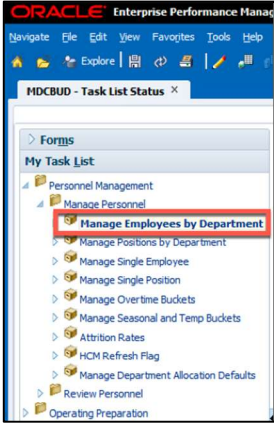
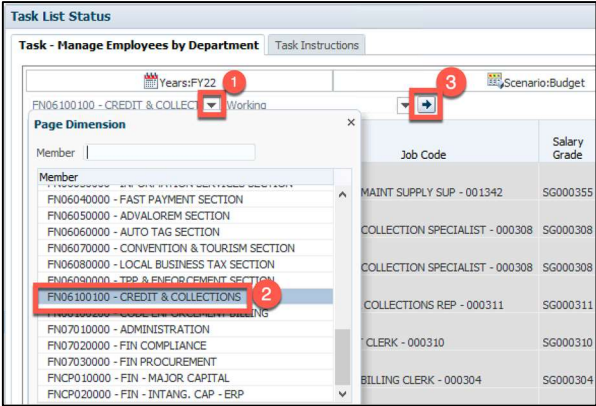
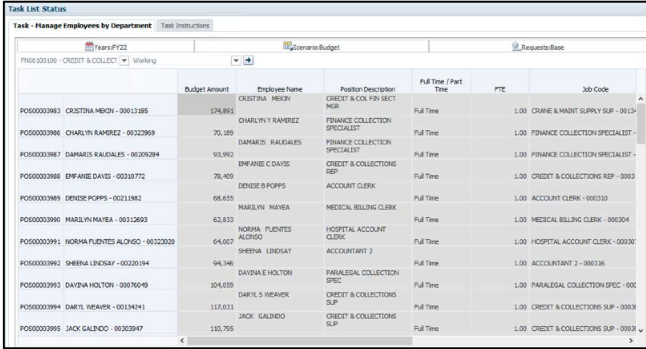
Lesson Overview

The Manage Employees by Department form allows users to select their Level 0 Department in the Point of View and displays the employees in the department in the rows. This form displays the following Accounts in the columns:

- **Budget Amount** – Budget amount (salary plus other compensation) for the employee. This value is calculated in Hyperion
- **Employee Name** – First and last name of employee. For existing employees, this value is sourced from HR
- **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
- **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 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
- **Job Code** – Job Code for the employee. For existing employees, this value is sourced from HR
- **Salary Grade** – Salary grade assigned to the employee. For existing employees, this value is sourced from HR
- **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
- **Pay Anniversary Date** – 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
- **Union** – Union code for the position. For existing employees, this value is sourced from HR
- **Headcount** – 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

In this lesson
you will learn:

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

Step	Action	Notes
1	<p>From the home screen, navigate to the Manage Employees by Department form by going to My Task List ->Personnel Management ->Manage Employees by Department.</p> 	
2	<p>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.</p> 	
3	<p>Review the form. You will now see employees listed in the rows according to the Department selected in the POV.</p> 	<p>- This form will not show any vacancies in the selected department.</p>

Lesson 2: Manage Positions by Department

Lesson Overview

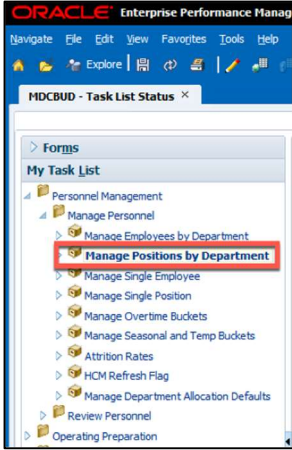
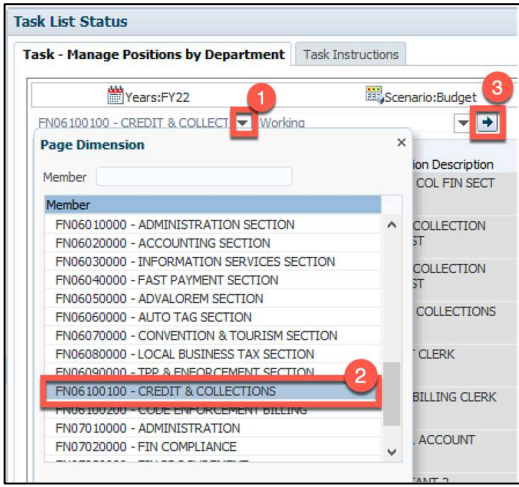
The Manage Positions by Department form allows users to select their Level 0 Department in the Point of View and displays the position vacancy records in the rows. This form displays the following Accounts in the columns:

- **Budget Amount** ->Budget amount (salary plus other compensation) for the vacancy. This value is calculated in Hyperion.
- **Position Description** ->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.
- **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 positions, this value is sourced from HR.
- **FTE** – Vacancy FTE value for the position. This value should match the Total Vacant FTE. On the Manage form, the value displayed is the budget year ending value (September value) since this value can change mid-budget year.
- **Job Code** ->Job Code for the position. For existing positions, this value is sourced from HR.
- **Salary Grade** ->Salary grade assigned to the position. For existing positions, this value is sourced from HR.
- **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.
- **Union** ->Union code for the position. For existing positions, 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.
- **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.
- **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.
- **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.
- **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.

In this lesson
you will learn:

- **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
- Review the form

Step	Action	Notes
1	<p>From the home screen, navigate to the Manage Positions by Department form by going to My Task List ->Personnel Management ->Manage Positions by Department.</p> 	
2	<p>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.</p> 	

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

Budget Amount	Position Description	FT_PT	FTE	Job Code	Salary Grade	Step	Union
	CREDIT & COL FIN SECT MGR	Full Time	0.00	CRANE & MAINT SUPPLY SUP - 001242	SG0003...		Non Bargaining - L
	FINANCE COLLECTION SPECIALIST	Full Time	0.00	FINANCE COLLECTION SPECIALIST - 000308	SG0003...	5	Local99 - General Employees - H
	FINANCE COLLECTION SPECIALIST	Full Time	0.00	FINANCE COLLECTION SPECIALIST - 000308	SG0003...	5	Local99 - General Employees - H
	CREDIT & COLLECTIONS REP	Full Time	0.00	CREDIT & COLLECTIONS REP - 000311	SG0003...	5	Local99 - General Employees - H
	ACCOUNT CLERK	Full Time	0.00	ACCOUNT CLERK - 000310	SG0003...	5	Local99 - General Employees - H
	MEDICAL BILLING CLERK	Full Time	0.00	MEDICAL BILLING CLERK - 000304	SG0003...	5	Local99 - General Employees - H
	HOSPITAL ACCOUNT CLERK	Full Time	0.00	HOSPITAL ACCOUNT CLERK - 000307	SG0003...	5	Local99 - General Employees - H
	ACCOUNTANT 2	Full Time	0.00	ACCOUNTANT 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

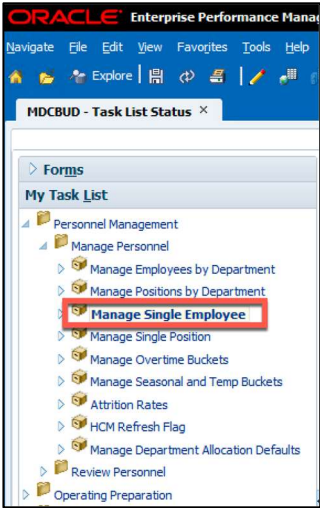
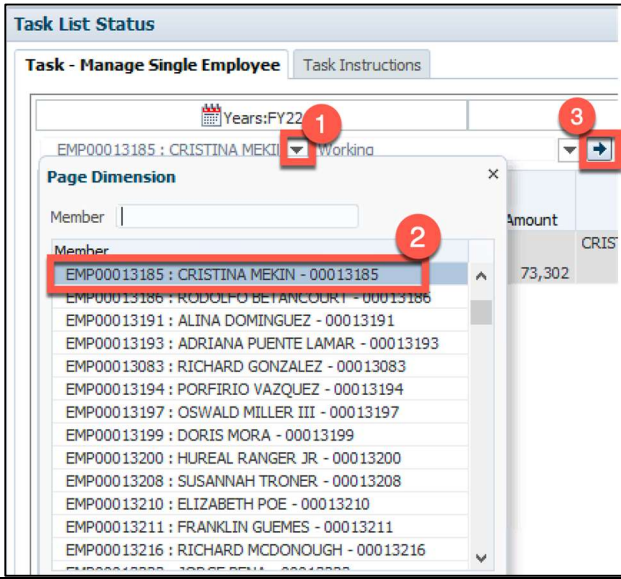
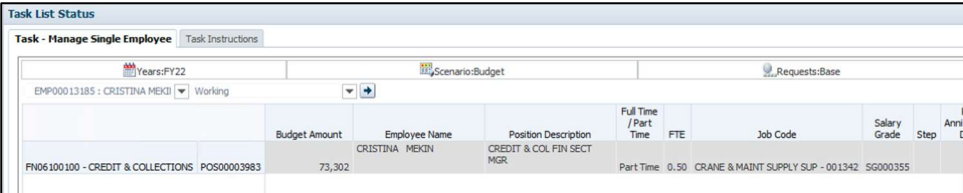
Lesson Overview

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:

- **Budget Amount** – Budget amount (salary plus other compensation) for the employee. This value is calculated in Hyperion
- **Employee Name** – First and last name of employee. For existing employees, this value is sourced from HR
- **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
- **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
- **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.
- **Pay Anniversary Date** – 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
- **Union** – Union code for the position. For existing employees, this value is sourced from HR
- **Headcount** – 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

In this
lesson
you will
learn:

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

Step	Action	Notes
1	<p>From the home screen, navigate to the Manage Single Employee form by going to My Task List ->Personnel Management ->Manage Single Employee.</p> 	
2	<p>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.</p> 	
3	<p>Review the form. You will now see data reflected on the form for the employee selected in the POV.</p> 	

Lesson 4: Manage Single Position

Lesson Overview

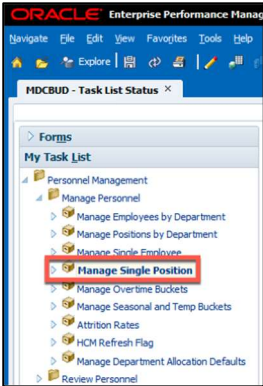
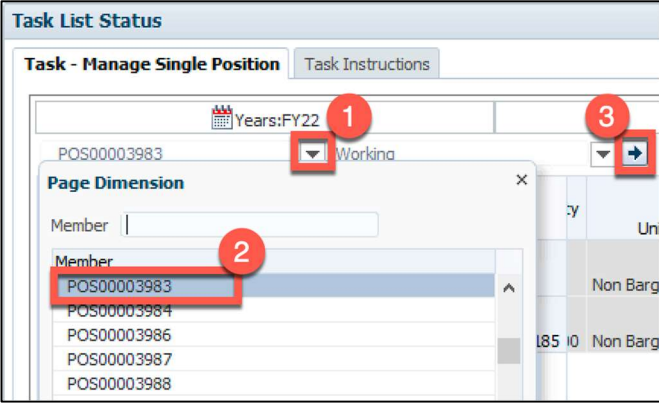
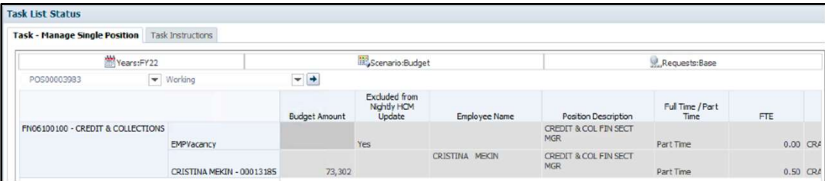
The Manage Single Position form allows users to select a Position in the Point of View and displays the Level 0 Department, vacancy record and assigned employees in the row. This form displays the following Accounts in the columns:

- **Budget Amount** – Budget amount (salary plus other compensation) for the employee or vacancy. This value is calculated in Hyperion
- **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
- **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
- **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 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
- **Job Code** – Job Code for the employee. For existing employees, this value is sourced from HR
- **Salary Grade** – Salary grade assigned to the employee. For existing employees, this value is sourced from HR
- **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. For the vacancy record, this will be the default value assigned in Hyperion
- **Pay Anniversary Date** – 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
- **Union** – Union code for the position. For existing positions, this value is sourced from HR
- **Headcount** – 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 and position. This value is for reporting purposes only and does not drive any calculations. For existing employees, this value is sourced from HR

- **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

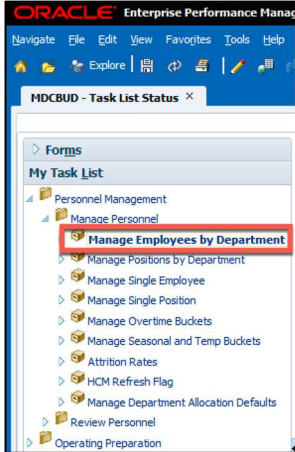
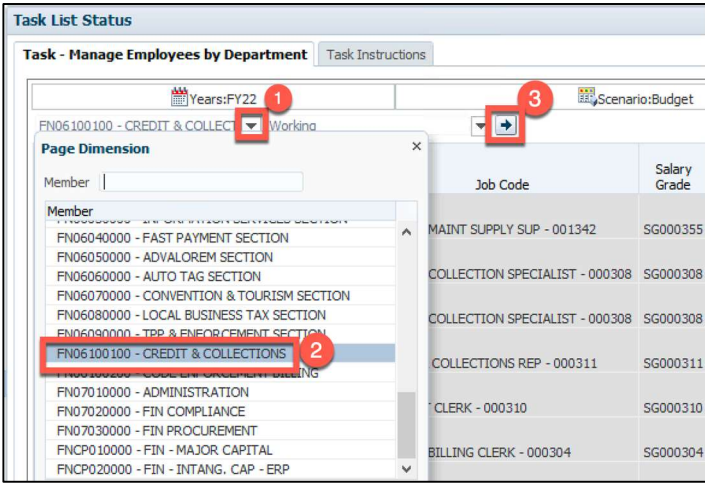
Step	Action	Notes
1	<p>From the home screen, navigate to the Manage Single Position form by going to My Task List ->Personnel Management ->Manage Single Position.</p> 	
2	<p>Click on the drop-down arrows next to the Position dimension in the point of view (POV) and select a Position. Click the "Go" arrow to save your selection.</p> 	<p>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</p>
3	<p>Review the form. You will now see data reflected on the form for the position selected in the POV.</p> 	<p>This form will show both the vacancy record and all employees assigned to the position</p>

Lesson 5: Personnel Details

Lesson Overview

The Personnel Details composite form contains 6 horizontal tabs that display data specific to an employee or position record. These 6 tabs are:

- Header
 - Salary
 - Other Compensation
 - Allocation
 - Calculated Compensation
 - Allocated Compensation
- In this lesson you will learn:
- Navigate to the Personnel Details form from the right click menu
 - Review each tab in the Personnel Details composite form

Step	Action	Notes
1	<p>From the home screen, navigate to the Manage Employees by Department form by going to My Task List ->Personnel Management ->Manage Employees by Department.</p> 	
2	<p>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.</p> 	
3	<p>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.</p>	

4 After navigating to the Personnel Details composite form, you will see there are 6 horizontal tabs. Click on the first tab: “Header” and review the information on this tab.

No_Bl	Position Description	Employee Name	Full Time / Part Time	FTE	Job Code	Union	Salary Grade	Pay Anniversary Date	Longevity Date	Longevity Years	Standard Hours	Head
	CREDIT & COL FIN SECT	CRISTINA MEKIN	Part Time	0.50	CRANIE & MAINT SUPPLY SUP - 001342	Non Bargaining - L	SG000355	10/7/20	12/29/86	33.00	20.00	

The header tab repeats most of the same accounts as the Manage form. For employees, this form will also show the Accrued Sick, Vacation and Holiday Hours, which drive the termination payout calculation if the employee is terminated in Hyperion

5 Click on the second tab: “Salary” and review the information on this tab.

No_FE	Full Time / Part Time	Part Time	Year Total CY Adjusted	Oct			Nov			Dec			Jan			Feb			Mar		
				Part Time	Part Time	Part Time	Part Time	Part Time	Part Time	Part Time	Part Time	Part Time	Part Time	Part Time	Part Time	Part Time	Part Time	Part Time	Part Time	Part Time	
	FTE	0.50		0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	
	Anniversary Date			10/7/20		10/7/21															
	SG000355	Pay Basis	Biweekly																		
		Budget Rate	4,790.0160	4,790.0160	4,790.0160	4,790.0160	4,790.0160	4,790.0160	4,790.0160	4,790.0160	4,790.0160	4,790.0160	4,790.0160	4,790.0160	4,790.0160	4,790.0160	4,790.0160	4,790.0160	4,790.0160	4,790.0160	
		Budget Rate Annualized		124,540.4160	124,540.4160	124,540.4160	124,540.4160	124,540.4160	124,540.4160	124,540.4160	124,540.4160	124,540.4160	124,540.4160	124,540.4160	124,540.4160	124,540.4160	124,540.4160	124,540.4160	124,540.4160	124,540.4160	
		Merit Broadband			0.0403	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	
		Cost of Living Adjustment			0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	
		Budget Rate Annualized		1,245.4042	1,245.4042	1,245.4042	1,245.4042	1,245.4042	1,245.4042	1,245.4042	1,245.4042	1,245.4042	1,245.4042	1,245.4042	1,245.4042	1,245.4042	1,245.4042	1,245.4042	1,245.4042	1,245.4042	
		Furlough Deduction			6.6667	6.6667	6.6667	6.6667	6.6667	6.6667	6.6667	6.6667	6.6667	6.6667	6.6667	6.6667	6.6667	6.6667	6.6667	6.6667	6.6667

The Salary tab will show the breakdown of base salary and then any adjustments, including COLA, merit, step increases and even furlough.

The Salary tab will also show the full time / part time status and FTE by month

6 Click on the third tab: “Other Compensation” and review the information on this tab.

The other compensation tab will list all “other comp elements” assigned to the

		<p>position or employee along with their associated rates.</p> <p>The Budget Rate is the rate used when calculating the position or employee</p>
<p>7</p>	<p>Click on the fourth tab: "Allocation" and review the information on this tab.</p>	<p>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.</p>
<p>8</p>	<p>Click on the fifth tab: "Calculated Compensation" and review the information on this tab.</p>	<p>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.</p> <p>Monthly amounts are driven off of a budget year pay period table managed by OMB.</p>
<p>9</p>	<p>Click on the sixth tab: "Allocated Compensation" and review the information on this tab.</p>	<p>The allocation compensation tab shows how the calculated compensation is allocated to the chart of accounts</p>

Task - Manage Employees by Department Task Instructions

Manage Employees by Department > Personnel Details

Scenario: Budget Department: FN06100100 - CREDIT & COLLECTIONS Version: Working Years: FY22 Position: POS00003983

Requests: Base Employee: CRISTINA MEKIN - 00013185

Header	Salary	Other Compensation	Allocation	Calculated Compensation	Allocated Compensation	Allocated Grant	Allocated Project	Allocated Activity	Allocation Percent	Allocated Job Code
SG000355										
Oct	4,790.02		5001120000 - PART TIME EMPLOYEE	G5004 - CREDIT & COLLECTION OP.	No_Grant No_Project No_Activity	100%	CRANE & MAINT SUPPLY SUP.			
Nov	4,790.02		5001120000 - PART TIME EMPLOYEE	G5004 - CREDIT & COLLECTION OP.	No_Grant No_Project No_Activity	100%	CRANE & MAINT SUPPLY SUP.			
Dec	7,185.02		5001120000 - PART TIME EMPLOYEE	G5004 - CREDIT & COLLECTION OP.	No_Grant No_Project No_Activity	100%	CRANE & MAINT SUPPLY SUP.			
Jan	4,790.02		5001120000 - PART TIME EMPLOYEE	G5004 - CREDIT & COLLECTION OP.	No_Grant No_Project No_Activity	100%	CRANE & MAINT SUPPLY SUP.			
Feb	4,790.02		5001120000 - PART TIME EMPLOYEE	G5004 - CREDIT & COLLECTION OP.	No_Grant No_Project No_Activity	100%	CRANE & MAINT SUPPLY SUP.			
Mar	4,790.02		5001120000 - PART TIME EMPLOYEE	G5004 - CREDIT & COLLECTION OP.	No_Grant No_Project No_Activity	100%	CRANE & MAINT SUPPLY SUP.			
Apr	4,790.02		5001120000 - PART TIME EMPLOYEE	G5004 - CREDIT & COLLECTION OP.	No_Grant No_Project No_Activity	100%	CRANE & MAINT SUPPLY SUP.			
May	4,790.02		5001120000 - PART TIME EMPLOYEE	G5004 - CREDIT & COLLECTION OP.	No_Grant No_Project No_Activity	100%	CRANE & MAINT SUPPLY SUP.			
Jun	4,790.02		5001120000 - PART TIME EMPLOYEE	G5004 - CREDIT & COLLECTION OP.	No_Grant No_Project No_Activity	100%	CRANE & MAINT SUPPLY SUP.			
Jul	7,185.02		5001120000 - PART TIME EMPLOYEE	G5004 - CREDIT & COLLECTION OP.	No_Grant No_Project No_Activity	100%	CRANE & MAINT SUPPLY SUP.			
Aug	4,790.02		5001120000 - PART TIME EMPLOYEE	G5004 - CREDIT & COLLECTION OP.	No_Grant No_Project No_Activity	100%	CRANE & MAINT SUPPLY SUP.			
Sep	4,790.02		5001120000 - PART TIME EMPLOYEE	G5004 - CREDIT & COLLECTION OP.	No_Grant No_Project No_Activity	100%	CRANE & MAINT SUPPLY SUP.			
Yr2	62,270.21		5001120000 - PART TIME EMPLOYEE	G5004 - CREDIT & COLLECTION OP.	No_Grant No_Project No_Activity	100%	CRANE & MAINT SUPPLY SUP.			
Yr3	62,270.21		5001120000 - PART TIME EMPLOYEE	G5004 - CREDIT & COLLECTION OP.	No_Grant No_Project No_Activity	100%	CRANE & MAINT SUPPLY SUP.			
Yr4	62,270.21		5001120000 - PART TIME EMPLOYEE	G5004 - CREDIT & COLLECTION OP.	No_Grant No_Project No_Activity	100%	CRANE & MAINT SUPPLY SUP.			

(driven off of the Allocation tab).

The very last row on the form will show the FTE allocation.

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:

- Lesson 1: Change Position from Full Time to Part Time
- Lesson 2: Change Part Time FTE
- Lesson 3: Change Position from Part Time to Full Time
- Lesson 4: Change Position Max Headcount
- Lesson 5: Move Position
- Lesson 6: Sync Position with HCM
- Lesson 7: Inactivate / Reactivate Position
- Lesson 8: Add / Delete New Position
- Lesson 9: Terminate / Reactivate Position
- Lesson 10: Transfer Employee / Undo Employee Transfer
- Lesson 11: Change Salary – Step
- Lesson 12: Change Salary – Range
- Lesson 13: Add / Delete Pay Component
- Lesson 14: Add / Delete Executive Benefits
- Lesson 15: Update Retirement
- Lesson 16: Update Allocation
- Lesson 17: Set Attrition Rates
- Lesson 18: Manage Department Allocation Defaults
- Lesson 19: View HCM Refresh Flag

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

Lesson 1: Change Position from Full Time to Part Time


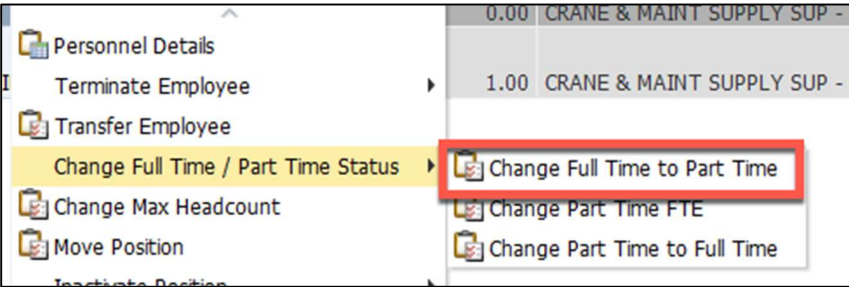
Lesson Overview

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 **Manage Single Position** task, but users can also make this change from **Manage Positions by Department**.

In this lesson you will learn:

- Navigate to the Manage Single Positions task
- Change a position from full time to part time
- Validate the results of the calculation

Step	Action	Notes
1	<p>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"</p> 	
2	<p>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.</p>	
3	<p>Note the following values for both the EMPVacancy record and the employees in the position:</p> <ul style="list-style-type: none"> ->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	<p>Right click on the EMPVacancy record and select "Change Full Time / Part Time Status-Change Full Time to Part Time"</p> 	
5	<p>In the run time prompt, select / enter the following:</p> <ul style="list-style-type: none"> ->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 <p>Select Launch.</p>	<p>->Users should not change the "Select Position" prompt ->The Standard Hours field is for reporting only and does not drive any calculations</p>

<p>6</p>	<p>Confirm the following for both the EMPVacancy record and the employees in the position:</p> <ul style="list-style-type: none"> ->The Full Time / Part Time column is now Part Time ->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 	
<p>7</p>	<p>Right click on the employee record and select "Personnel Details"</p>	
<p>8</p>	<p>Select the Salary tab and confirm the following:</p> <ul style="list-style-type: none"> ->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 	
<p>9</p>	<p>Select the Calculated Compensation tab and confirm the following:</p> <ul style="list-style-type: none"> ->Confirm the calculated amounts starting in the start month you selected ->Full time position specific elements stop calculating in the start month you selected in the rule ->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 	<p>The elements that only apply to personnel with an FTE greater than 0.74 (ex: health, dental, flex, longevity bonus, pay components) will still appear on the Other Compensation tab,</p>

		<p>but they won't be calculated</p>
<p>10</p>	<p>Select the Allocated Compensation tab and confirm the following: ->The Allocated Account changes from employee regular to part time employee in the start month you selected in the rule ->The budget year-end FTE is allocated to the part time filled FTE account (very bottom of the data form)</p>	<p>These amounts will be mapped to the operating database (FINSTMT) during the next scheduled data map</p>
<p>11</p>	<p>Select the "Manage Positions ->Single" breadcrumb to return to the manage form</p>	
<p>12</p>	<p>If the vacancy member has an FTE value, you can validate the calculated and allocated compensation for that member as well</p>	<p>The EMPVacancy member won't have calculated or allocated compensation if the FTE is 0</p>
<p>13</p>	<p>Because you have made a change to the position--the "Exclude from HCM Update" column should now be marked as "Yes", indicating that this change is excluded from the nightly HCM refresh.</p>	<p>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</p>

Lesson 2: Change Part Time Position FTE


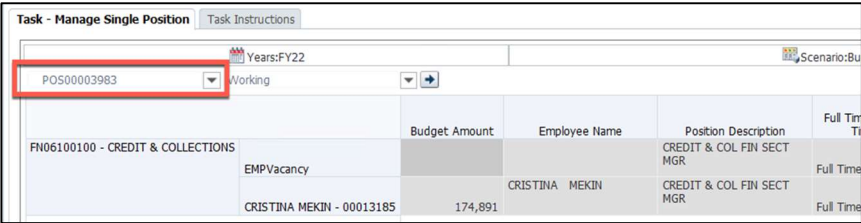
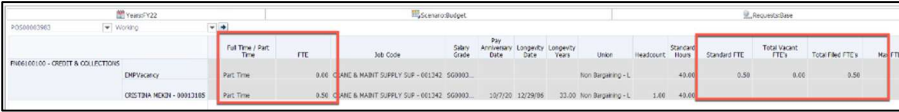
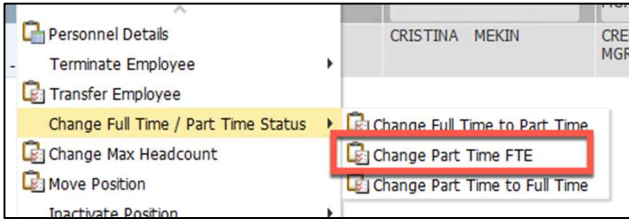
Lesson Overview

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:

- Navigate to the Manage Single Positions task
- Change the FTE assigned to a part time position
- Validate the results of the calculation

Step	Action	Notes
1	<p>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"</p> 	
2	<p>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.</p> 	
3	<p>Note the following values for both the EMPVacancy record and the employees in the position:</p> <ul style="list-style-type: none"> ->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	<p>Right click on the EMPVacancy record and select "Change Full Time / Part Time Status-Change Part Time FTE"</p> 	

5 In the run time prompt, select / enter the following:
 ->Select Position: Confirm the position to change
 ->Enter FTE: Enter the new Part Time FTE value
 ->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

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

7 Right click on the employee record and select "Personnel Details"

8 Select the Salary tab and confirm the following:
 ->The FTE value changes in the start month you selected in the rule

No./PE	Full Time / Part Time	BegBalance	Year Total CY Adjusted											
			Part Time	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Part Time	
	FTE	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75
	Anniversary Date	10/27/20	10/27/20											
S0000355	Pay Base	Bimonthly												
	Budget Rate	4,790.0160	4,790.0160	4,790.0160	4,790.0160	4,790.0160	4,790.0160	4,790.0160	4,790.0160	4,790.0160	4,790.0160	4,790.0160	4,790.0160	4,790.0160
	Budget Rate Annualized		124,540.4160	124,540.4160	124,540.4160	124,540.4160	124,540.4160	124,540.4160	124,540.4160	124,540.4160	124,540.4160	124,540.4160	124,540.4160	124,540.4160
	Merit Broadband	Budget Rate		0.0403	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05
	Cost of Living Adjustment	Budget Rate		0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01
	Budget Rate Annualized			1,245.4042	1,245.4042	1,245.4042	1,245.4042	1,245.4042	1,245.4042	1,245.4042	1,245.4042	1,245.4042	1,245.4042	1,245.4042
	Furlough Deduction	Budget Rate		6.6667	6.6667	6.6667	6.6667	6.6667	6.6667	6.6667	6.6667	6.6667	6.6667	6.6667

9 Select the Calculated Compensation tab and confirm the following:
 ->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

RequestBase		Employee:CRISTINA MEKIN - 00013185									
Header	Salary	Other Compensation	Allocation	Calculated Compensation				Allocated Compensation			
				Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
\$6000355	Salary Amount			7,185.02	7,185.02	10,777.54	7,185.02	7,185.02	7,185.02	7,185.02	7,185.02
	Current Year Salary			7,185.02	7,185.02	10,777.54	7,185.02	7,185.02	7,185.02	7,185.02	7,185.02
	Cost of Living Adjustment			71.85	71.85	107.78	71.85	71.85	71.85	71.85	71.85
	Total Salary			7,256.87	7,256.87	10,885.31	7,256.87	7,256.87	7,256.87	7,256.87	7,256.87
	Flex Benefits	Other Compensation Amount		84.62	84.62	126.92	84.62	84.62	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	1,153.85	1,153.85
	Life Insurance Rate	Other Compensation Amount		15.32	15.32	22.98	15.32	15.32	15.32	15.32	15.32
	Dental Plans	Other Compensation Amount		18.69	18.69	28.04	18.69	18.69	18.69	18.69	18.69
	FLORIDA STATE RETIREMENT SYSTEM (21)	Other Compensation Amount		630.62	630.62	945.93	630.62	630.62	630.62	630.62	630.62
	Social Security Rate	Other Compensation Amount		449.93	449.93	674.89	449.93	449.93	449.93	449.93	449.93
	Medicare Rate	Other Compensation Amount		105.22	105.22	157.84	105.22	105.22	105.22	105.22	105.22
	Total Other Compensation	Total Compensation		2,498.25	2,498.25	3,687.37	2,498.25	2,498.25	2,498.25	2,498.25	2,498.25
	Total Pay Element	Total Compensation		9,755.12	9,755.12	14,572.68	9,755.12	9,755.12	9,755.12	9,755.12	9,755.12

The elements that only apply to personnel with an FTE greater than 0.74 (ex: health, dental, flex, 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)

RequestBase		Employee:CRISTINA MEKIN - 00013185									
Header	Salary	Other Compensation	Allocation	Calculated Compensation				Allocated Compensation			
				Budget Amount	Allocated Account	Allocated Fund	Allocated Grant	Allocated Project	Allocated Activity	Allocation Percent	Allocated Job Code
Dec	157.84	501130000 - MICA MEDICARE HO...	05004 - CREDIT & COLLECTION O...	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342			
Jan	105.22	501130000 - MICA MEDICARE HO...	05004 - CREDIT & COLLECTION O...	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342			
Feb	105.22	501130000 - MICA MEDICARE HO...	05004 - CREDIT & COLLECTION O...	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342			
Mar	105.22	501130000 - MICA MEDICARE HO...	05004 - CREDIT & COLLECTION O...	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342			
Apr	105.22	501130000 - MICA MEDICARE HO...	05004 - CREDIT & COLLECTION O...	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342			
May	105.22	501130000 - MICA MEDICARE HO...	05004 - CREDIT & COLLECTION O...	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342			
Jun	105.22	501130000 - MICA MEDICARE HO...	05004 - CREDIT & COLLECTION O...	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342			
Jul	157.84	501130000 - MICA MEDICARE HO...	05004 - CREDIT & COLLECTION O...	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342			
Aug	105.22	501130000 - MICA MEDICARE HO...	05004 - CREDIT & COLLECTION O...	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342			
Sep	1,362.60	501130000 - MICA MEDICARE HO...	05004 - CREDIT & COLLECTION O...	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342			
Y13	1,395.42	501130000 - MICA MEDICARE HO...	05004 - CREDIT & COLLECTION O...	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342			
Y14	1,459.37	501130000 - MICA MEDICARE HO...	05004 - CREDIT & COLLECTION O...	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342			
FTE_PE	0.75	Part Time Filled FTE	05004 - CREDIT & COLLECTION O...	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342			

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



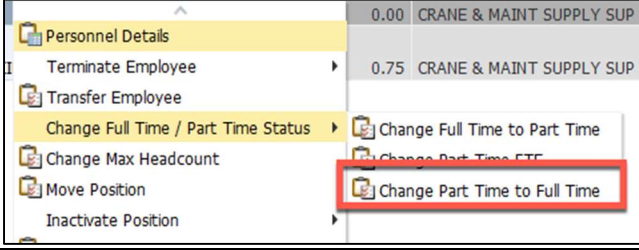
12 If the vacancy member has an FTE value, you can validate the calculated and allocated compensation for that member as well




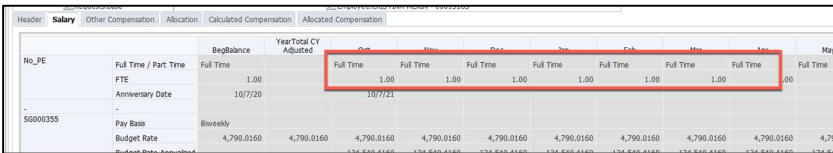

The EMPVacancy member won't have calculated or allocated compensation if the FTE is 0

13	Because you have made a change to the position--the "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
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Lesson 3: Change Position from Part Time to Full Time

Lesson Overview	<p>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.</p> <p>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.</p>
In this lesson you will learn:	<ul style="list-style-type: none"> • Navigate to the Manage Single Positions task • Change a position from Full Time status to Part Time Status • Validate the results of the calculation

Step	Action	Notes
1	<p>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"</p> 	
2	<p>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.</p>	
3	<p>Note the following values for both the EMPVacancy record and the employees in the position:</p> <ul style="list-style-type: none"> ->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	<p>Right click on the EMPVacancy record and select "Change Full Time / Part Time Status-Change Part Time to Full Time"</p> 	
5	<p>In the run time prompt, select / enter the following:</p> <ul style="list-style-type: none"> ->Select Position: Confirm the position to change ->Enter Standard Hours: Enter the standard hours for the Full-Time position 	<p>->Users should not change the "Select Position" prompt</p>

	<p>->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</p> <p>Select Launch</p> 	<p>->The Standard Hours field is for reporting only and does not drive any calculations</p> <p>->Full time positions are automatically defaulted to a 1.0 FTE</p>
<p>6</p>	<p>Confirm the following for both the EMPVacancy record and the employees in the position:</p> <ul style="list-style-type: none"> ->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 ->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 	
<p>7</p>	<p>Right click on the employee record and select "Personnel Details"</p> 	
<p>8</p>	<p>Select the Salary tab and confirm the following:</p> <ul style="list-style-type: none"> ->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 	
<p>9</p>	<p>Select the Calculated Compensation tab and confirm the following:</p> <ul style="list-style-type: none"> ->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 	

<p>10</p>	<p>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)</p>	<p>These amounts will be mapped to the operating database (FINSTMT) during the next scheduled data map</p>
<p>11</p>	<p>Select the "Manage Positions ->Single" breadcrumb to return to the manage form</p>	
<p>12</p>	<p>If the vacancy member has an FTE value, you can validate the calculated and allocated compensation for that member as well</p>	<p>The EMPVacancy member won't have calculated or allocated compensation if the FTE is 0</p>
<p>13</p>	<p>Because you have made a change to the position--the "Exclude from HCM Update" column should now be marked as "Yes", indicating that this change is excluded from the nightly HCM refresh.</p>	<p>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</p>

Month	Budget Amount	Allocated Account	Allocated Fund	Allocated Grant	Allocated Project	Allocated Activity	Allocation Percent	Allocated Job Code
Dec	270.71	501130000 - MICA MEDICARE H.	65004 - CREDIT & COLLECTION O.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342
Jan	141.59	501130000 - MICA MEDICARE H.	65004 - CREDIT & COLLECTION O.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342
Feb	141.59	501130000 - MICA MEDICARE H.	65004 - CREDIT & COLLECTION O.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342
Mar	141.59	501130000 - MICA MEDICARE H.	65004 - CREDIT & COLLECTION O.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342
Apr	141.59	501130000 - MICA MEDICARE H.	65004 - CREDIT & COLLECTION O.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342
May	141.59	501130000 - MICA MEDICARE H.	65004 - CREDIT & COLLECTION O.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342
Jun	141.59	501130000 - MICA MEDICARE H.	65004 - CREDIT & COLLECTION O.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342
Jul	215.34	501130000 - MICA MEDICARE H.	65004 - CREDIT & COLLECTION O.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342
Aug	141.59	501130000 - MICA MEDICARE H.	65004 - CREDIT & COLLECTION O.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342
Sep	141.59	501130000 - MICA MEDICARE H.	65004 - CREDIT & COLLECTION O.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342
Y2	2,033.73	501130000 - MICA MEDICARE H.	65004 - CREDIT & COLLECTION O.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342
Y3	2,061.32	501130000 - MICA MEDICARE H.	65004 - CREDIT & COLLECTION O.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342
Y4	2,069.19	501130000 - MICA MEDICARE H.	65004 - CREDIT & COLLECTION O.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342
FTE_PE	1.00	Full Time Filled FTE	65004 - CREDIT & COLLECTION O.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP - 001342

Task - Manage Single Position | Task Instructions

Manage Positions - Single > Personnel Details

Scenario:Budget	Department:FN06100100 - CREDIT & COLLECTIONS			
Requests:Base	Employee:CRISTINA MEKIN - 00013185			
Header	Salary Other Compensation Allocation Calculated Compensation Allocated Compensation			
Position Description	Employee Name	Full Time / Part Time	FTE	Job Code
CREDIT & COL FIN SECT MGR	CRISTINA MEKIN	Part Time	0.50	CRANE & MAINT SUPPLY SUP - 001342

Lesson 4: Change Position Max Headcount

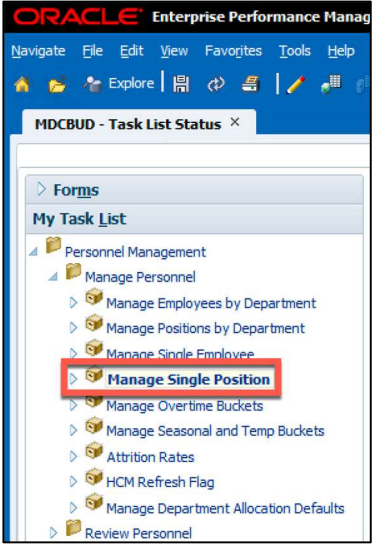
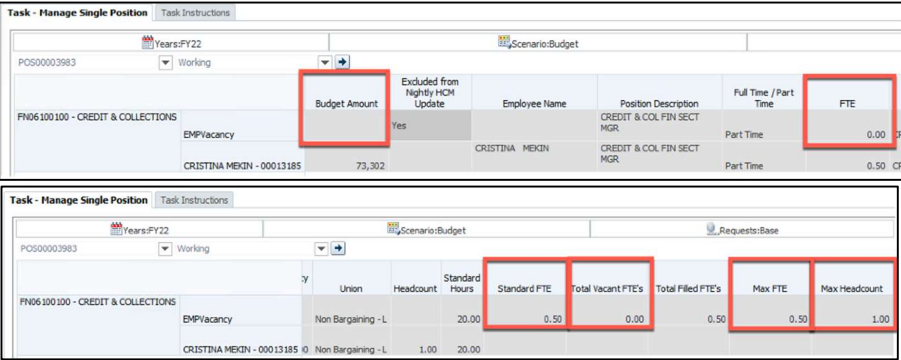
Lesson Overview

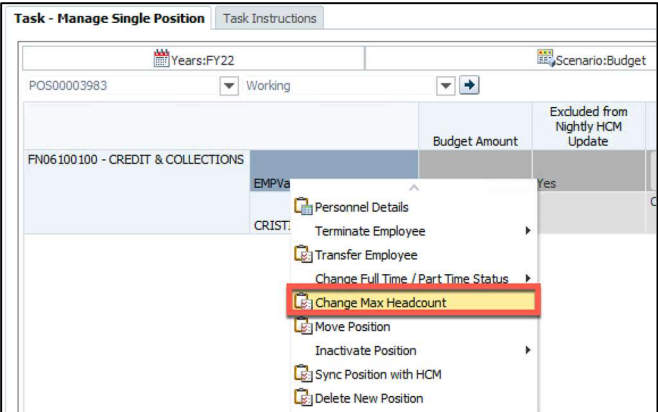
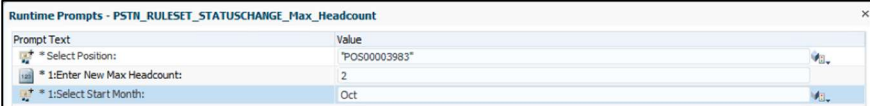
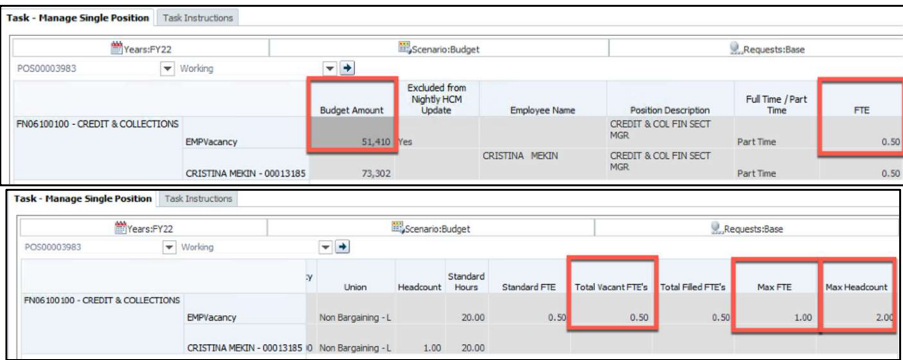
This lesson will guide users through the steps to change the max headcount of a position in the budget year. This status change occurs at the position level and will impact the FTE vacancy calculation for the EMPVacancy record.

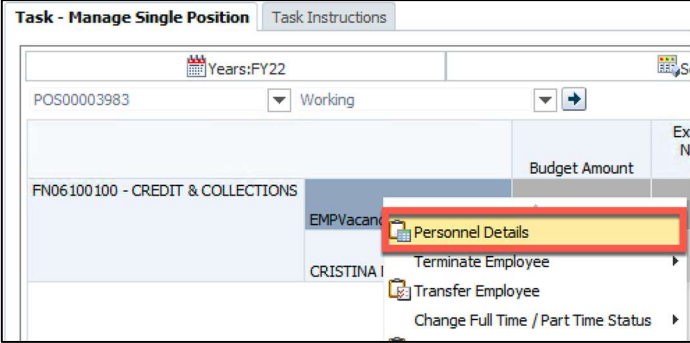
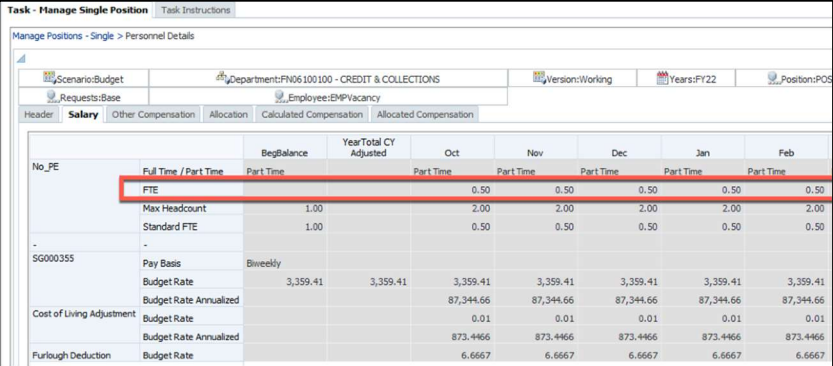
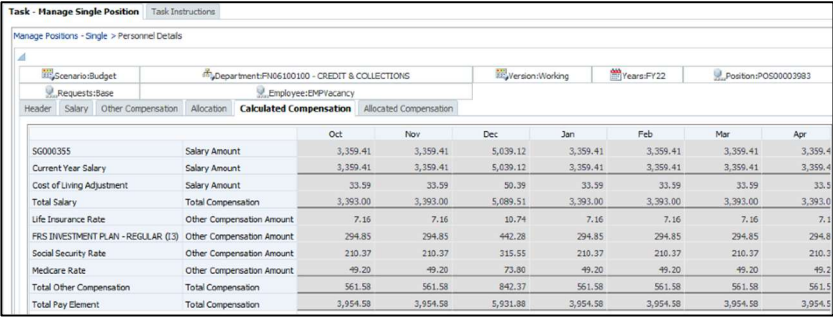
The steps listed below will navigate the user to the **Manage Single Position** task, but users can also make this change from **Manage Positions by Department**.

In this lesson you will learn:

- Navigate to the Manage Single Position task
- Change the max headcount of a position
- Validate the results of the calculation

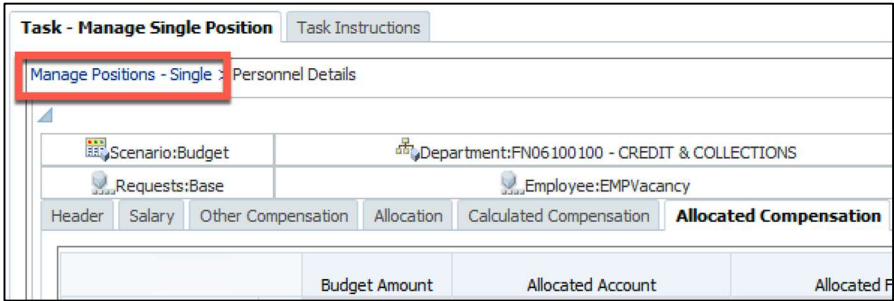
Step	Action	Notes
1	<p>From the home screen, navigate to the Manage Single Position form by going to My Task List ->Personnel Management ->Manage Personnel ->Manage Single Position.</p> 	
2	<p>Click on the drop-down arrow next to the Position dimension in the point of view (POV) and select a Position. Click the "Go" arrow to save your selection.</p>	
3	<p>Note the following values for the EMPVacancy record:</p> <ul style="list-style-type: none"> ->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 	

<p>4</p>	<p>Right click on the EMPVacancy record and select "Change Max Headcount" from the right click menu.</p> 	
<p>5</p>	<p>In the run time prompt, select / enter the following: ->Select Position: Confirm the position to change ->Enter New Max Headcount: Enter new max headcount 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.</p> 	<p>If you enter a headcount lower than the sum of current employees, the rule will fail to execute.</p>
<p>6</p>	<p>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</p> 	

<p>7</p>	<p>Right click on the EMPVacancy record and select "Personnel Details".</p> 																																																																																																				
<p>8</p>	<p>Select the Salary tab and confirm the following: ->The FTE value is updated starting in the start month you selected</p> 																																																																																																				
<p>9</p>	<p>Select the Calculated Compensation tab and confirm the following: ->Confirm the calculated amounts starting in the start month you selected</p>  <table border="1" data-bbox="300 1066 1128 1381"> <thead> <tr> <th></th> <th></th> <th>Oct</th> <th>Nov</th> <th>Dec</th> <th>Jan</th> <th>Feb</th> <th>Mar</th> <th>Apr</th> </tr> </thead> <tbody> <tr> <td>SG000355</td> <td>Salary Amount</td> <td>3,359.41</td> <td>3,359.41</td> <td>5,039.12</td> <td>3,359.41</td> <td>3,359.41</td> <td>3,359.41</td> <td>3,359.41</td> </tr> <tr> <td></td> <td>Current Year Salary</td> <td>3,359.41</td> <td>3,359.41</td> <td>5,039.12</td> <td>3,359.41</td> <td>3,359.41</td> <td>3,359.41</td> <td>3,359.41</td> </tr> <tr> <td></td> <td>Cost of Living Adjustment</td> <td>33.59</td> <td>33.59</td> <td>50.39</td> <td>33.59</td> <td>33.59</td> <td>33.59</td> <td>33.59</td> </tr> <tr> <td></td> <td>Total Salary</td> <td>3,393.00</td> <td>3,393.00</td> <td>5,089.51</td> <td>3,393.00</td> <td>3,393.00</td> <td>3,393.00</td> <td>3,393.00</td> </tr> <tr> <td></td> <td>Life Insurance Rate</td> <td>7.16</td> <td>7.16</td> <td>10.74</td> <td>7.16</td> <td>7.16</td> <td>7.16</td> <td>7.16</td> </tr> <tr> <td></td> <td>FRS INVESTMENT PLAN - REGULAR (I.3)</td> <td>294.85</td> <td>294.85</td> <td>442.28</td> <td>294.85</td> <td>294.85</td> <td>294.85</td> <td>294.85</td> </tr> <tr> <td></td> <td>Social Security Rate</td> <td>210.37</td> <td>210.37</td> <td>315.55</td> <td>210.37</td> <td>210.37</td> <td>210.37</td> <td>210.37</td> </tr> <tr> <td></td> <td>Medicare Rate</td> <td>49.20</td> <td>49.20</td> <td>73.80</td> <td>49.20</td> <td>49.20</td> <td>49.20</td> <td>49.20</td> </tr> <tr> <td></td> <td>Total Other Compensation</td> <td>561.58</td> <td>561.58</td> <td>842.37</td> <td>561.58</td> <td>561.58</td> <td>561.58</td> <td>561.58</td> </tr> <tr> <td></td> <td>Total Pay Element</td> <td>3,954.58</td> <td>3,954.58</td> <td>5,931.88</td> <td>3,954.58</td> <td>3,954.58</td> <td>3,954.58</td> <td>3,954.58</td> </tr> </tbody> </table>			Oct	Nov	Dec	Jan	Feb	Mar	Apr	SG000355	Salary Amount	3,359.41	3,359.41	5,039.12	3,359.41	3,359.41	3,359.41	3,359.41		Current Year Salary	3,359.41	3,359.41	5,039.12	3,359.41	3,359.41	3,359.41	3,359.41		Cost of Living Adjustment	33.59	33.59	50.39	33.59	33.59	33.59	33.59		Total Salary	3,393.00	3,393.00	5,089.51	3,393.00	3,393.00	3,393.00	3,393.00		Life Insurance Rate	7.16	7.16	10.74	7.16	7.16	7.16	7.16		FRS INVESTMENT PLAN - REGULAR (I.3)	294.85	294.85	442.28	294.85	294.85	294.85	294.85		Social Security Rate	210.37	210.37	315.55	210.37	210.37	210.37	210.37		Medicare Rate	49.20	49.20	73.80	49.20	49.20	49.20	49.20		Total Other Compensation	561.58	561.58	842.37	561.58	561.58	561.58	561.58		Total Pay Element	3,954.58	3,954.58	5,931.88	3,954.58	3,954.58	3,954.58	3,954.58	
		Oct	Nov	Dec	Jan	Feb	Mar	Apr																																																																																													
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<p>10</p>	<p>Select the Allocated Compensation tab and confirm the following: ->The correct budget year-end FTE is allocated to the full-time vacant FTE account (very bottom of the data form)</p>	<p>These amounts will be mapped to the operating database (FINSTMT) during the next scheduled data map.</p>																																																																																																			

Header	Salary	Other Compensation	Allocation	Calculated Compensation	Allocated Compensation				Allocated Job Code
	Budget Amount	Allocated Account	Allocated Fund	Allocated Grant	Allocated Project	Allocated Activity	Allocation Percent		
Dec	73.80	5011130000 - MICA MEDICARE H...	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	
Jan	49.20	5011130000 - MICA MEDICARE H...	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	
Feb	49.20	5011130000 - MICA MEDICARE H...	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	
Mar	49.20	5011130000 - MICA MEDICARE H...	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	
Apr	49.20	5011130000 - MICA MEDICARE H...	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	
May	49.20	5011130000 - MICA MEDICARE H...	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	
Jun	49.20	5011130000 - MICA MEDICARE H...	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	
Jul	73.80	5011130000 - MICA MEDICARE H...	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	
Aug	49.20	5011130000 - MICA MEDICARE H...	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	
Sep	49.20	5011130000 - MICA MEDICARE H...	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	
Yr2	645.98	5011130000 - MICA MEDICARE H...	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	
Yr3	652.44	5011130000 - MICA MEDICARE H...	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	
Yr4	658.96	5011130000 - MICA MEDICARE H...	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	
Yr5	665.55	5011130000 - MICA MEDICARE H...	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	
FTE_PE	0.50	Part Time Vacant FTE	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100%	CRANE & MAINT SUPPLY SUP -	

11 Select the "Manage Positions ->Single" breadcrumb to return to the Manage Single Position form.



12 Because you have made a change to the position--the "Exclude from HCM Update" column should now be marked as "Yes", indicating that this change is excluded from the nightly HCM refresh.

Lesson 5: Move Position

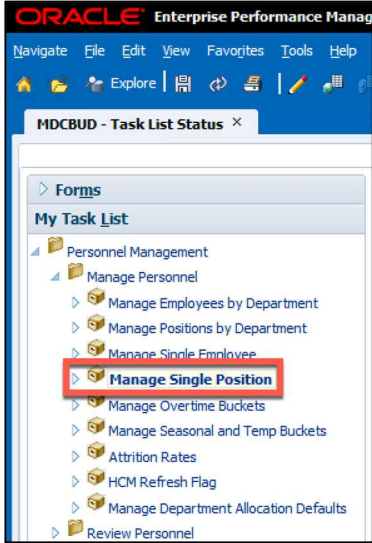
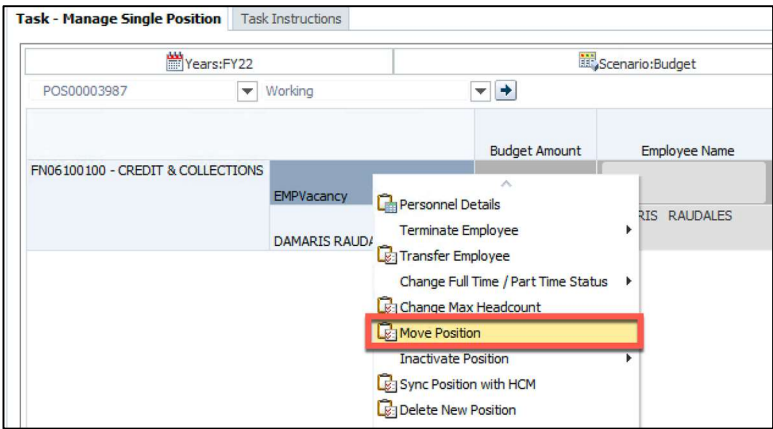
Lesson Overview

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 **Manage Single Position** task, but users can also make this change from **Manage Positions by Department**.

In this lesson you will learn:

- Navigate to the Manage Single Position task
- Move a position from one department to another
- Validate the results of the calculation

Step	Action	Notes
1	<p>From the home screen, navigate to the Manage Single Position form by going to My Task List → Personnel Management → Manage Personnel → Manage Single Position.</p> 	
2	<p>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.</p>	
3	<p>Right click on the EMPVacancy record and select "Move Position".</p> 	

4

In the run time prompt, select / enter the following:

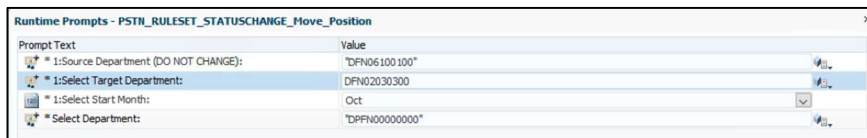
->Source Department (DO NOT CHANGE): Confirm the source department for the position

->Target Department: Use the member selector to select the target department for the 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

Select Launch.

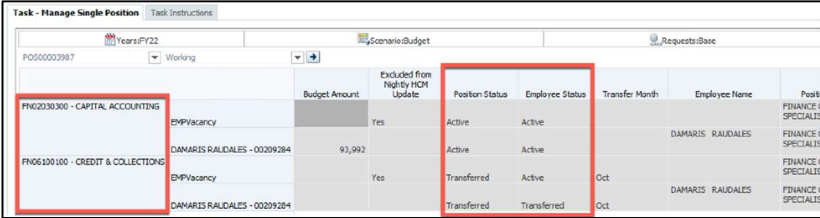
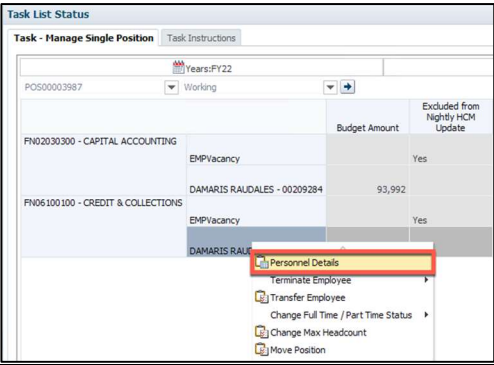
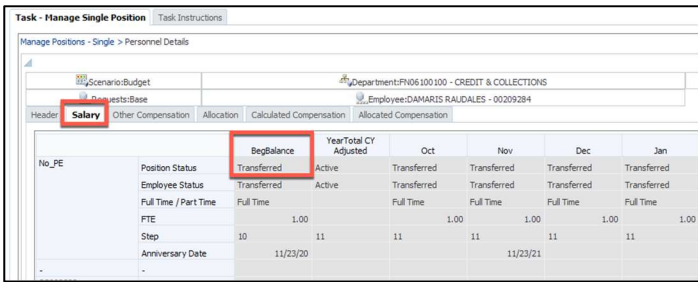


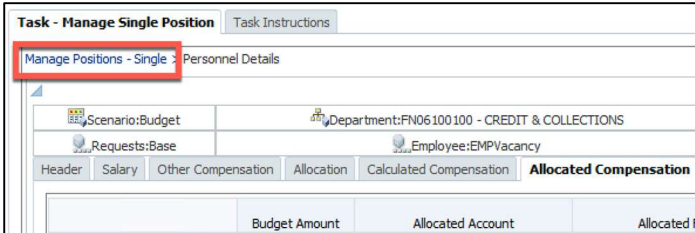
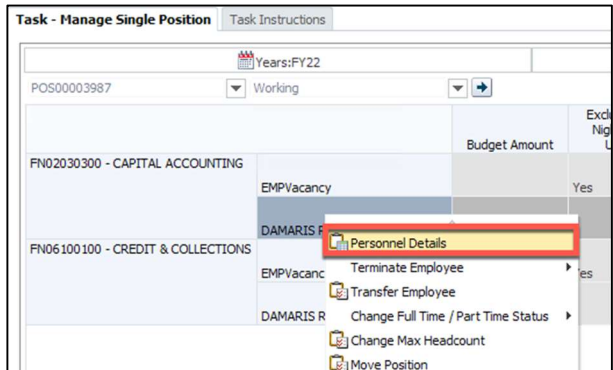
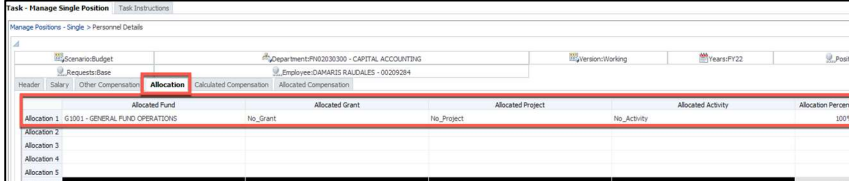
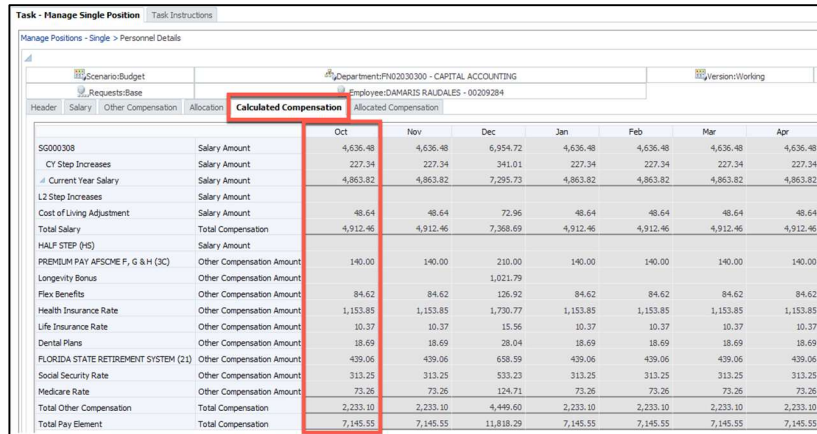
Prompt Text	Value
* 1:Source Department (DO NOT CHANGE):	"DFN06100100"
* 1:Select Target Department:	DFN02030300
* 1:Select Start Month:	Oct
* Select Department:	"DPFN00000000"

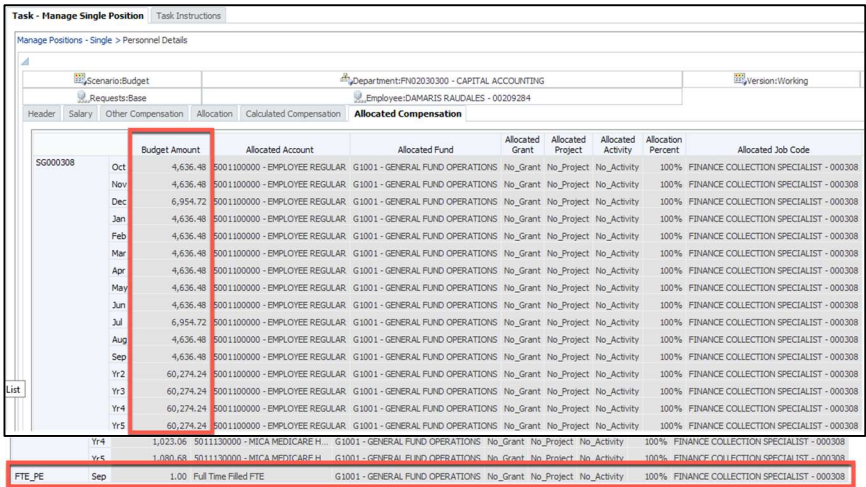
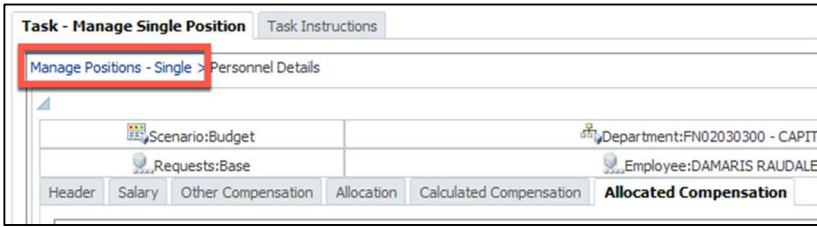
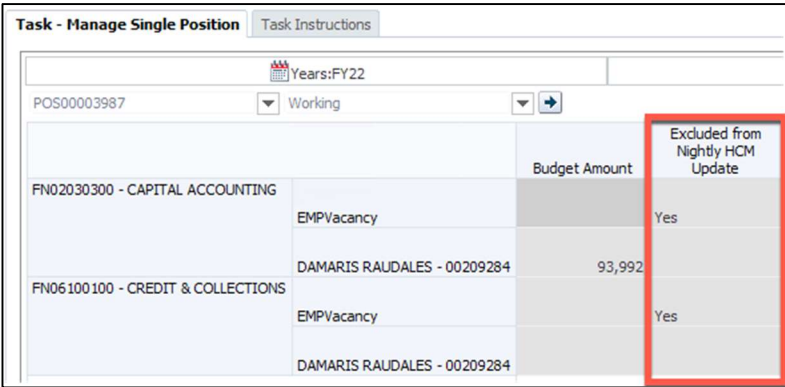
Moving a position will move the vacancy record and all employees in the position from one department to another starting in the selected start month. From the start month onwards, budget dollars will be cleared from the source department and calculated in the target department.

- 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 change this value.

<p>5</p>	<p>Confirm the following for both the EMPVacancy record and the employees in the position: ->The records have been copied to the target department and still appear in the source department ->The Position Status column and the employee status column (for employees) is set to Transferred</p> 	<p>-</p>
<p>6</p>	<p>Right click on the employee record in the SOURCE department and select "Personnel Details".</p> 	
<p>7</p>	<p>Select the Salary tab and confirm the following: ->The Position Status changes to "Transferred" starting in the start month you selected</p> 	
<p>8</p>	<p>Select the Calculated Compensation tab and confirm the following: ->Calculated amounts are cleared starting in the start month you selected</p>	
<p>9</p>	<p>Select the Allocated Compensation tab and confirm the following: ->Budget amounts are cleared starting in the start month you selected ->No FTE is allocated (at the bottom of the form)</p>	<p>These amounts (or cleared amounts) will be mapped to the operating database (FINSTMT) during the next scheduled data map.</p>

<p>10</p>	<p>Select the "Manage Positions ->Single" breadcrumb to return to the Manage Single Positions form.</p> 																																																																																																																																																																												
<p>11</p>	<p>Right click on the employee record in the TARGET department and select "Personnel Details".</p> 																																																																																																																																																																												
<p>12</p>	<p>Select the Salary tab and confirm the following: ->The Position Status changes from Inactive to Active starting in the start month you selected</p>																																																																																																																																																																												
<p>13</p>	<p>Select the Allocation tab and confirm the following: ->Department's default fund, grant, project, and activity is displayed on Allocation 1</p> 																																																																																																																																																																												
<p>14</p>	<p>Select the Calculated Compensation tab and confirm the following: ->Calculated amounts are calculated starting in the start month you selected</p>  <table border="1" data-bbox="300 1438 1112 1869"> <thead> <tr> <th></th> <th></th> <th>Oct</th> <th>Nov</th> <th>Dec</th> <th>Jan</th> <th>Feb</th> <th>Mar</th> <th>Apr</th> </tr> </thead> <tbody> <tr> <td>SG000308</td> <td>Salary Amount</td> <td>4,636.48</td> <td>4,636.48</td> <td>6,954.72</td> <td>4,636.48</td> <td>4,636.48</td> <td>4,636.48</td> <td>4,636.48</td> </tr> <tr> <td>CY Step Increases</td> <td>Salary Amount</td> <td>227.34</td> <td>227.34</td> <td>341.01</td> <td>227.34</td> <td>227.34</td> <td>227.34</td> <td>227.34</td> </tr> <tr> <td>Current Year Salary</td> <td>Salary Amount</td> <td>4,863.82</td> <td>4,863.82</td> <td>7,295.73</td> <td>4,863.82</td> <td>4,863.82</td> <td>4,863.82</td> <td>4,863.82</td> </tr> <tr> <td>L2 Step Increases</td> <td>Salary Amount</td> <td></td> <td></td> <td></td> <td></td> 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Amount	48.64	48.64	72.96	48.64	48.64	48.64	48.64	Total Salary	Total Compensation	4,912.46	4,912.46	7,368.69	4,912.46	4,912.46	4,912.46	4,912.46	HALF STEP (HS)	Salary Amount								PREMIUM PAY AFSCME F, G & H (3C)	Other Compensation Amount	140.00	140.00	210.00	140.00	140.00	140.00	140.00	Longevity Bonus	Other Compensation Amount			1,021.79					Flex Benefits	Other Compensation Amount	84.62	84.62	126.92	84.62	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	1,153.85	Life Insurance Rate	Other Compensation Amount	10.37	10.37	15.56	10.37	10.37	10.37	10.37	Dental Plans	Other Compensation Amount	18.69	18.69	28.04	18.69	18.69	18.69	18.69	FLORIDA STATE RETIREMENT SYSTEM (21)	Other Compensation Amount	439.06	439.06	658.59	439.06	439.06	439.06	439.06	Social Security Rate	Other Compensation Amount	313.25	313.25	533.23	313.25	313.25	313.25	313.25	Medicare Rate	Other Compensation Amount	73.26	73.26	124.71	73.26	73.26	73.26	73.26	Total Other Compensation	Total Compensation	2,233.10	2,233.10	4,449.60	2,233.10	2,233.10	2,233.10	2,233.10	Total Pay Element	Total Compensation	7,145.55	7,145.55	11,818.29	7,145.55	7,145.55	7,145.55	7,145.55	
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<p>15</p>	<p>Select the Allocated Compensation tab and confirm the following: ->Budget amounts are calculated starting in the start month you selected ->FTE is allocated correctly (at the bottom of the form)</p> 	<p>These amounts (or cleared amounts) will be mapped to the operating database (FINSTMT) during the next scheduled data map.</p>
<p>16</p>	<p>Select the "Manage Positions – Single" breadcrumb to return to the Manage Single Positions form.</p> 	
<p>17</p>	<p>Because you have made a change to the position--the "Exclude from HCM Update" column should now be marked as "Yes", indicating that this change is excluded from the nightly HCM refresh.</p> 	

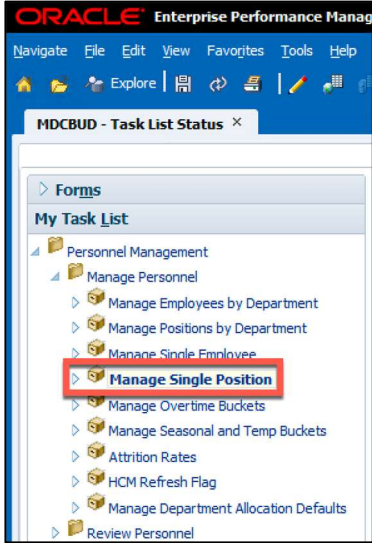
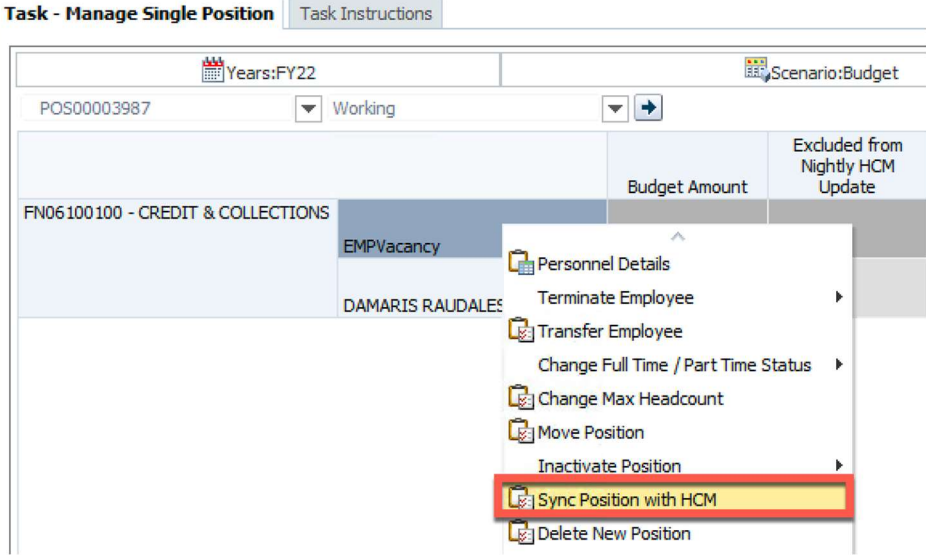
Lesson 6: Sync Position with HCM

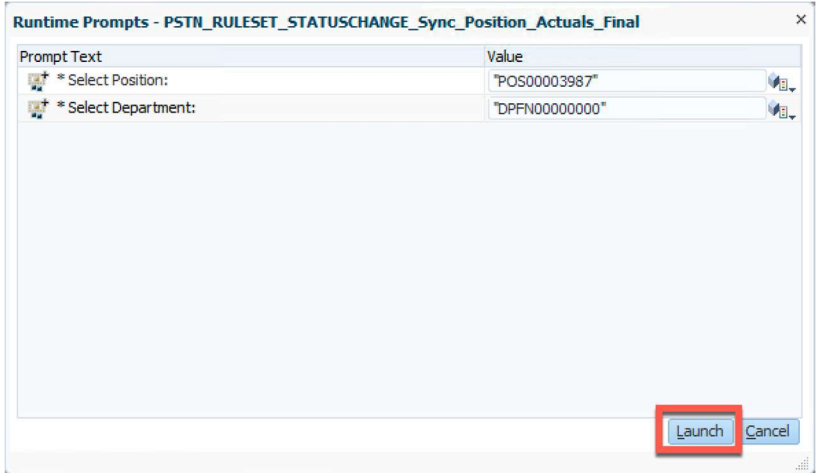
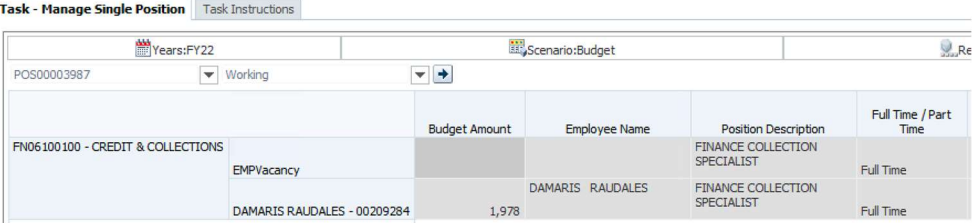
Lesson Overview

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 **Manage Single Position** task, but users can also make this change from **Manage Positions by Department**.

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	<p>From the home screen, navigate to the Manage Single Position form by going to My Task List → Personnel Management → Manage Personnel → Manage Single Position.</p> 	
2	<p>Click on the drop-down arrow next to the Position dimension in the point of view (POV) and select any Position that has been modified in Hyperion (and therefore has the “Exclude from HCM Update” flag marked as Yes). Click the "Go" arrow to save your selection.</p>	
3	<p>Right click on the EMPVacancy record and select "Sync Position with HCM".</p> 	
4	<p>In the run time prompt, select / enter the following:</p> <ul style="list-style-type: none"> - Select Position: Confirm the position to sync - Select Department: Confirm the department. This should be the department the position resides in 	

	<p>Select Launch.</p> 																
<p>5</p>	<p>Because you have synced this position with HCM—the "Exclude from HCM Update" will no longer be displayed on the screen, indicating that this change is not excluded from the nightly HCM refresh</p>  <table border="1" data-bbox="235 989 1203 1119"> <thead> <tr> <th></th> <th>Budget Amount</th> <th>Employee Name</th> <th>Position Description</th> <th>Full Time / Part Time</th> </tr> </thead> <tbody> <tr> <td>EMPVacancy</td> <td></td> <td>DAMARIS RAUDALES</td> <td>FINANCE COLLECTION SPECIALIST</td> <td>Full Time</td> </tr> <tr> <td>DAMARIS RAUDALES - 00209284</td> <td>1,978</td> <td></td> <td>FINANCE COLLECTION SPECIALIST</td> <td>Full Time</td> </tr> </tbody> </table>		Budget Amount	Employee Name	Position Description	Full Time / Part Time	EMPVacancy		DAMARIS RAUDALES	FINANCE COLLECTION SPECIALIST	Full Time	DAMARIS RAUDALES - 00209284	1,978		FINANCE COLLECTION SPECIALIST	Full Time	<p>This is the only way to remove the “exclude” flag from a position and its assigned employees and to have the position resync from HR</p> <p>The sync will copy all data for the position and employees assigned to the position from the HR staging version into the budget.</p>
	Budget Amount	Employee Name	Position Description	Full Time / Part Time													
EMPVacancy		DAMARIS RAUDALES	FINANCE COLLECTION SPECIALIST	Full Time													
DAMARIS RAUDALES - 00209284	1,978		FINANCE COLLECTION SPECIALIST	Full Time													
<p>6</p>	<p>Confirm the following for both the EMPVacancy record and the employees in the position:</p> <ul style="list-style-type: none"> - The records only appear in one department now (the original department) - Position Status and Employee Status columns have been suppressed, indicating the position and employee is active for the full budget year 																

Lesson 7: Inactivate/Reactivate Position

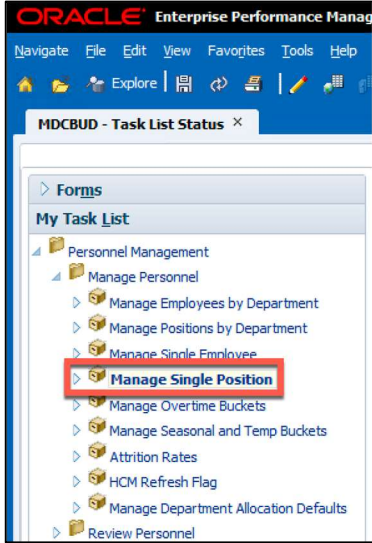
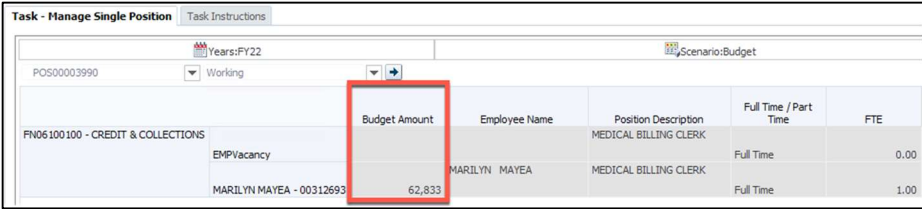
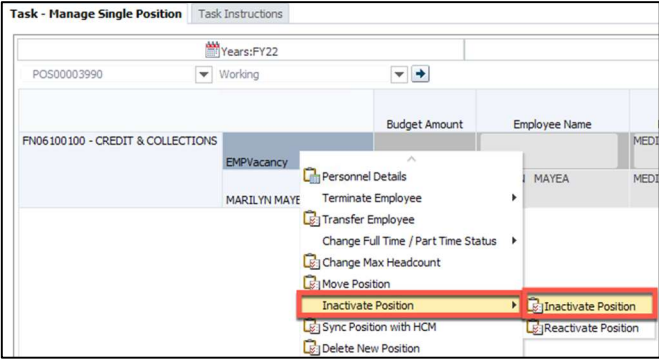
Lesson Overview

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:

- Navigate to the Manage Single Position task
- Inactivate and reactivate a position
- Validate the results of the calculation

Step	Action	Notes
1	<p>From the home screen, navigate to the Manage Single Position form by going to My Task List → Personnel Management → Manage Personnel → Manage Single Position.</p> 	
2	<p>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.</p>	
3	<p>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</p> 	
4	<p>Right click on the EMPVacancy record and select "Inactivate Position ->Inactivate Position".</p> 	

5 In the run time prompt, select / enter the following:
 ->Select Position: Confirm the position to inactivate
 ->Start Month: Use the member selector to select the start month for the inactivation
 ->Apply Termination Payout: This defaults to “Yes”, but if a user changes it to “No”, termination pay will **not** be calculated

Select Launch.

Runtime Prompts - PSTN_RULESET_STATUSCHANGE_Inactivate_Position

Prompt Text	Value
* Select Position:	"POS00003988"
* 1:Select Start Month:	Oct
* 1:Apply Termination Payout:	Yes

Launch Cancel

Inactivating a position will clear the budget costs for the vacancy and all employees assigned to the position starting in the selected start month.

The rule will fail if you try to inactivate a position that has already been inactivated or transferred to another department.

6 Confirm the following for both the EMPVacancy record and the employees in the position:
 ->The Budget Amount column should be decreased (if you selected a start month other than October) or blank if you selected October as the start month
 ->The Position Status column is set to Inactive

Task - Manage Single Position | Task Instructions

Years: FY22 Scenario: Budget

Budget Amount	Excluded from Nightly HCM Update	Position Status	Employee Name
10,073	Yes	Inactive	MARILYN MAYEA
		Inactive	MARILYN MAYEA - 00312693

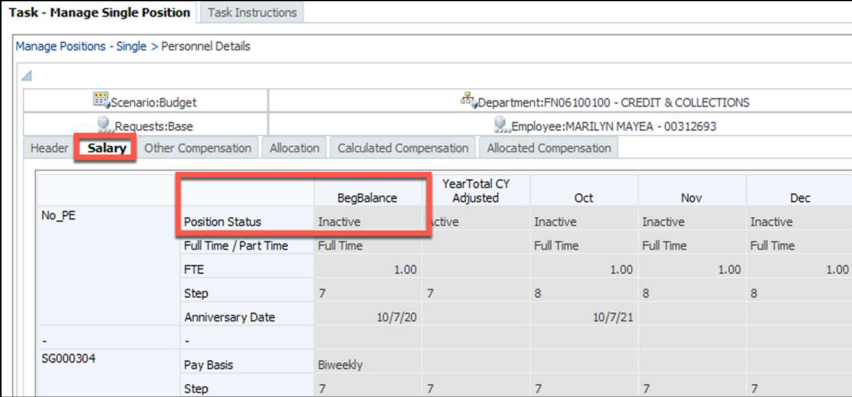
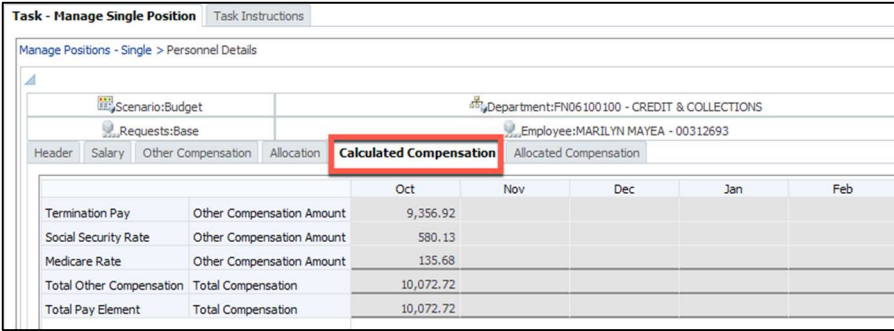
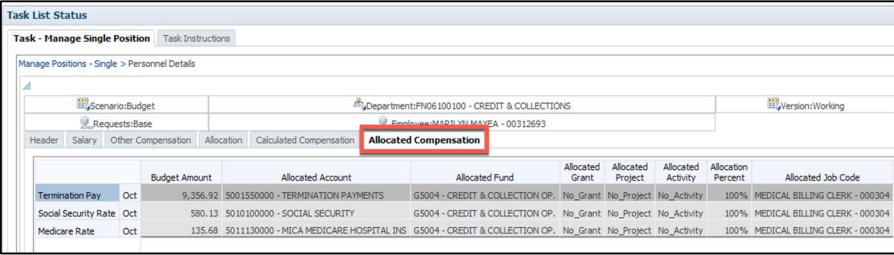
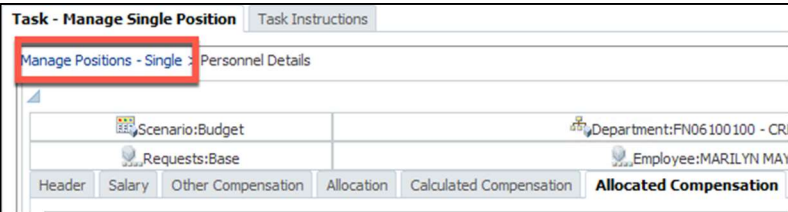
7 Right click on the employee record and select "Personnel Details".

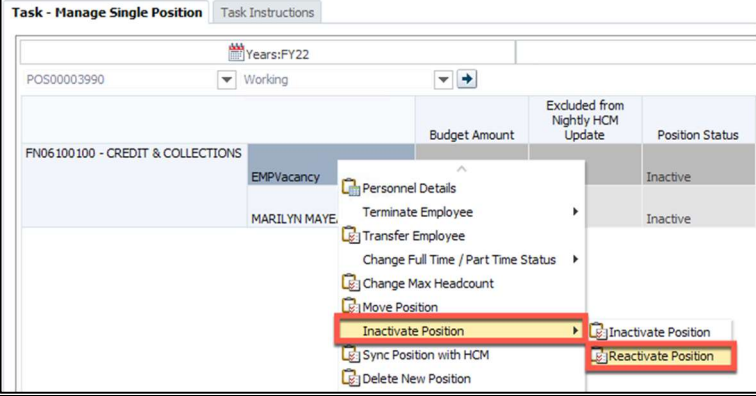

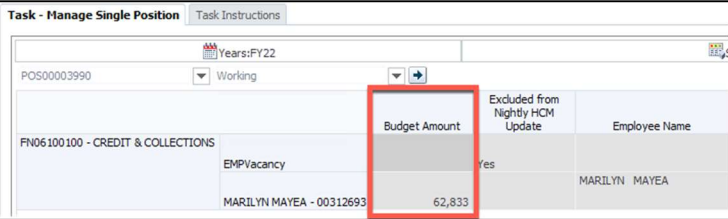
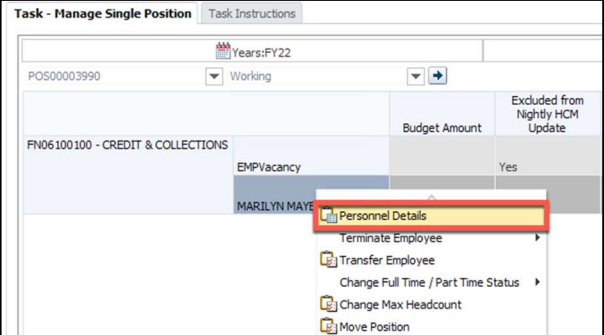
Task - Manage Single Position | Task Instructions

Years: FY22 Scenario: Budget

Budget Amount	Excluded from Nightly HCM Update
	Yes

- Personnel Details
- Terminate Employee
- Transfer Employee
- Change Full Time / Part Time Status
- Change Max Headcount
- Move Position

<p>8</p>	<p>Select the Salary tab and confirm the following: ->The Position Status changes to Inactive starting in the start month you selected</p> 	
<p>9</p>	<p>Select the Calculated Compensation tab and confirm the following: ->Calculated amounts are cleared starting in the start month you selected</p> 	
<p>10</p>	<p>Select the Allocated Compensation tab and confirm the following: ->Budget amounts are cleared starting in the start month you selected ->No FTE is allocated (at the bottom of the form)</p> 	<p>These amounts (or cleared amounts) will be mapped to the operating database (FINSTMT) during the next scheduled data map.</p>
<p>11</p>	<p>Select the "Manage Positions ->Single" breadcrumb to return to the Manage Single Position form.</p> 	

Step	Action	Notes
1	<p>Right click on the EMPVacancy record and select "Inactivate Position → Reactivate Position".</p> 	
2	<p>In the run time prompt, select / enter the following: - Select Position: Confirm the position to reactivate Select Launch.</p> 	<p>Reactivating a position will reset the position and employees back to the budget amounts from before the inactivation.</p> <p>The rule will fail if you try to reactivate a position that has not been inactivated or has been transferred to a different department.</p>
3	<p>Confirm the following for both the EMPVacancy record and the employees in the position: - The Budget Amount column should be back to how it was before you inactivated the position</p> 	
4	<p>Right click on the employee record and select "Personnel Details".</p> 	

5 Select the Salary tab and confirm the following:
 - The Position Status row has been suppressed (indicating the position is active for the budget year)

No_PE	Full Time / Part Time	BegBalance	Year Total CY Adjusted	Oct	Nov	Dec
	Full 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		

6 Select the Calculated Compensation tab and confirm the following:
 - Calculated amounts are recalculated for the year

		Oct	Nov	Dec	Jan	Feb	Mar
SG000304	Salary Amount	2,789.62	2,789.62	4,184.43	2,789.62	2,789.62	2,789.62
	Current Year Salary	2,789.62	2,789.62	4,184.43	2,789.62	2,789.62	2,789.62
	Merit Step Increases	90.00	111.60	167.40	111.60	111.60	111.60
	Cost of Living Adjustment	28.80	29.01	43.52	29.01	29.01	29.01
	Total Salary	2,908.42	2,930.23	4,395.35	2,930.23	2,930.23	2,930.23
	HALF STEP (HS)						
	PREMIUM PAY AFSCHME F, G & H (3C)	140.00	140.00	210.00	140.00	140.00	140.00
	Flex Benefits	84.62	84.62	126.92	84.62	84.62	84.62
	Health Insurance Rate	1,153.85	1,153.85	1,730.77	1,153.85	1,153.85	1,153.85
	Life Insurance Rate	6.14	6.19	9.28	6.19	6.19	6.19
	Dental Plans	18.69	18.69	28.04	18.69	18.69	18.69
	FRS INVESTMENT PLAN - REGULAR (13)	264.91	266.80	400.20	266.80	266.80	266.80
	Social Security Rate	189.00	190.35	285.53	190.35	190.35	190.35
	Medicare Rate	44.20	44.52	66.78	44.52	44.52	44.52
	Total Other Compensation	1,901.41	1,905.02	2,857.52	1,905.02	1,905.02	1,905.02
	Total Pay Element	4,809.82	4,835.25	7,252.87	4,835.25	4,835.25	4,835.25

7 Select the Allocated Compensation tab and confirm the following:
 - Budget amounts are reallocated for the year
 - FTE is allocated (at the bottom of the form)

These amounts will be mapped to the operating database (FINSTMT) during the next scheduled data map.

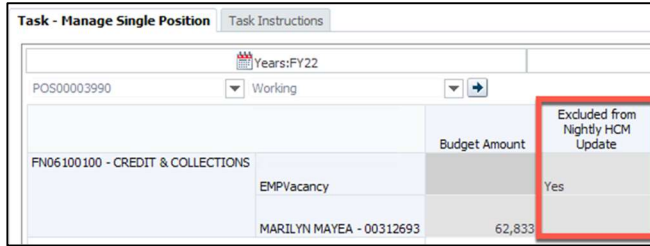
	Budget Amount	Allocated Account	Allocated Fund	Allocated Grant	Allocated Project	Allocated Activity	Allocation Percent	Allocated Job Code
SG000304	Oct	2,789.62	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100% MEDICAL BILLING CLERK - 000304
	Nov	2,789.62	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100% MEDICAL BILLING CLERK - 000304
	Dec	4,184.43	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100% MEDICAL BILLING CLERK - 000304
	Jan	2,789.62	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100% MEDICAL BILLING CLERK - 000304
	Feb	2,789.62	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100% MEDICAL BILLING CLERK - 000304
	Mar	2,789.62	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100% MEDICAL BILLING CLERK - 000304
	Apr	2,789.62	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100% MEDICAL BILLING CLERK - 000304
	May	2,789.62	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100% MEDICAL BILLING CLERK - 000304
	Jun	2,789.62	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100% MEDICAL BILLING CLERK - 000304
	Jul	4,184.43	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100% MEDICAL BILLING CLERK - 000304
	Aug	2,789.62	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100% MEDICAL BILLING CLERK - 000304
	Sep	2,789.62	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100% MEDICAL BILLING CLERK - 000304

FTE_PE	Sep	1.00	Full Time Filled FTE	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 000304
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7 Select the "Manage Positions → Single" breadcrumb to return to the Manage Single Position form.

8

Because you have made a change to the position—the "Exclude from HCM Update" column should now be marked as "Yes", indicating that this change is excluded from the nightly HCM refresh.



Task - Manage Single Position		Task Instructions	
Years: FY22			
POS00003990	Working		
FN06100100 - CREDIT & COLLECTIONS	EMPVacancy	Budget Amount	Excluded from Nightly HCM Update
MARILYN MAYEA - 00312693		62,833	Yes

Lesson 8: Add/Delete New Position

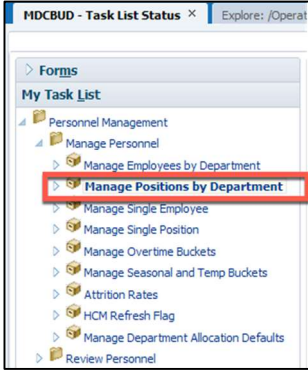
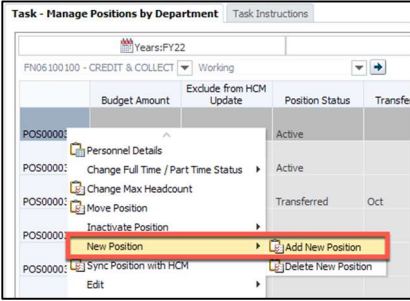
Lesson Overview

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 **Manage Positions by Department**. This is the only form with the Add Position menu.

In this lesson you will learn:

- Navigate to the Manage Single Position task
- Add or delete a new position
- Validate the results of the calculation

Step	Action	Notes
1	<p>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.</p> 	
2	<p>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.</p>	
3	<p>Right click on the form and select "New Position ->Add New Position"</p> 	
4	<p>In the run time prompt, select / enter the following:</p> <ul style="list-style-type: none"> ->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 ->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 <p>Select Launch.</p>	<p>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.</p> <p>The new position number is defaulted and is not tied to anything.</p>

<p>5</p>	<p>Right click on the new position and select "Personnel Details".</p>																																																																																																	
<p>6</p>	<p>Select the Header tab and confirm the following:</p> <ul style="list-style-type: none"> ->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 ->Max Headcount is the value you entered in the run time prompt 	<p>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</p>																																																																																																
<p>7</p>	<p>Select the Salary tab and confirm the following:</p> <ul style="list-style-type: none"> ->The correct salary grade and midpoint step or rate is assigned to the new position ->COLA (if applicable) is assigned to the new position <table border="1"> <thead> <tr> <th colspan="2"></th> <th>ReqBalance</th> <th>Oct</th> <th>Nov</th> <th>Dec</th> <th>Jan</th> <th>Feb</th> </tr> </thead> <tbody> <tr> <td>No_PE</td> <td>Full Time / Part Time</td> <td>Full Time</td> <td>Full Time</td> <td>Full Time</td> <td>Full Time</td> <td>Full Time</td> <td>Full Time</td> </tr> <tr> <td></td> <td>FTE</td> <td>1.00</td> <td>1.00</td> <td>1.00</td> <td>1.00</td> <td>1.00</td> <td>1.00</td> </tr> <tr> <td></td> <td>Max Headcount</td> <td>1.00</td> <td>1.00</td> <td>1.00</td> <td>1.00</td> <td>1.00</td> <td>1.00</td> </tr> <tr> <td></td> <td>Standard FTE</td> <td>1.00</td> <td>1.00</td> <td>1.00</td> <td>1.00</td> <td>1.00</td> <td>1.00</td> </tr> <tr> <td></td> <td>Step</td> <td>5</td> <td>5</td> <td>5</td> <td>5</td> <td>5</td> <td>5</td> </tr> <tr> <td></td> <td>Pay Basis</td> <td>Bimonthly</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td>Step</td> <td>5</td> <td>5</td> <td>5</td> <td>5</td> <td>5</td> <td>5</td> </tr> <tr> <td>SG001188</td> <td>Budget Rate</td> <td>1,701.97</td> <td>1,701.97</td> <td>1,701.97</td> <td>1,701.97</td> <td>1,701.97</td> <td>1,701.97</td> </tr> <tr> <td></td> <td>Budget Rate Annualized</td> <td></td> <td>44,251.22</td> <td>44,251.22</td> <td>44,251.22</td> <td>44,251.22</td> <td>44,251.22</td> </tr> <tr> <td></td> <td>Cost of Living Adjustment Budget Rate</td> <td></td> <td>0.01</td> <td>0.01</td> <td>0.01</td> <td>0.01</td> <td>0.01</td> </tr> <tr> <td></td> <td>Budget Rate Annualized</td> <td></td> <td>442.5122</td> <td>442.5122</td> <td>442.5122</td> <td>442.5122</td> <td>442.5122</td> </tr> </tbody> </table>			ReqBalance	Oct	Nov	Dec	Jan	Feb	No_PE	Full Time / Part Time	Full Time	Full Time	Full Time	Full Time	Full Time	Full Time		FTE	1.00	1.00	1.00	1.00	1.00	1.00		Max Headcount	1.00	1.00	1.00	1.00	1.00	1.00		Standard FTE	1.00	1.00	1.00	1.00	1.00	1.00		Step	5	5	5	5	5	5		Pay Basis	Bimonthly							Step	5	5	5	5	5	5	SG001188	Budget Rate	1,701.97	1,701.97	1,701.97	1,701.97	1,701.97	1,701.97		Budget Rate Annualized		44,251.22	44,251.22	44,251.22	44,251.22	44,251.22		Cost of Living Adjustment Budget Rate		0.01	0.01	0.01	0.01	0.01		Budget Rate Annualized		442.5122	442.5122	442.5122	442.5122	442.5122	
		ReqBalance	Oct	Nov	Dec	Jan	Feb																																																																																											
No_PE	Full Time / Part Time	Full Time	Full Time	Full Time	Full Time	Full Time	Full Time																																																																																											
	FTE	1.00	1.00	1.00	1.00	1.00	1.00																																																																																											
	Max Headcount	1.00	1.00	1.00	1.00	1.00	1.00																																																																																											
	Standard FTE	1.00	1.00	1.00	1.00	1.00	1.00																																																																																											
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SG001188	Budget Rate	1,701.97	1,701.97	1,701.97	1,701.97	1,701.97	1,701.97																																																																																											
	Budget Rate Annualized		44,251.22	44,251.22	44,251.22	44,251.22	44,251.22																																																																																											
	Cost of Living Adjustment Budget Rate		0.01	0.01	0.01	0.01	0.01																																																																																											
	Budget Rate Annualized		442.5122	442.5122	442.5122	442.5122	442.5122																																																																																											

<p>8</p>	<p>Select the Other Compensation tab and confirm the following: ->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</p>	
<p>9</p>	<p>Select the Allocation tab and confirm the following: ->The correct default fund, grant, project and activity was assigned to the new position</p>	<p>The allocation is defaulted from the Department Allocation Defaults form</p>
<p>10</p>	<p>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</p>	
<p>11</p>	<p>Select the Allocated Compensation tab and confirm the following: ->Salary is allocated to the correct salary account ->FTE is allocated to the correct FTE account (at the bottom of the form)</p>	<p>These amounts (or cleared amounts) will be mapped to the operating database (FINSTMT) during the next scheduled data map.</p>

Task List Status

Task - Manage Positions by Department | Task Instructions

Manage Positions by Department > Personnel Details

Scenario: Budget | Department: FN06100100 - CREDIT & COLLECTIONS

Requests: Base | Employee: EMPVacancy

Header | Salary | **Other Compensation** | Allocation | Calculated Compensation | Allocated Compensation

	Calculation Type	BegBalance FTE Greater Than	Maximum Value	Apply to Retirement	Apply to Taxes	Oct Budget Rate	Nov Budget Rate
PREMIUM PAY GSAF (7C)	Monthly			Yes	Yes	151.6700	151.6700
Flex Benefits	Monthly	0.7400		No	Yes	91.6667	91.6667
Health Insurance Rate	Monthly	0.7400				1,250.0000	1,250.0000
Life Insurance Rate	Percent of Salary					0.0021	0.0021
Dental Plans	Monthly	0.7400				20.2500	20.2500
FRS INVESTMENT PLAN - REGULAR (I3)	Percent of Retirement Eligible Earnings					0.0869	0.0869
Social Security Rate	Percent of Taxable Earnings		8,853.6000			0.0620	0.0620
Medicare Rate	Percent of Taxable Earnings					0.0145	0.0145

Task - Manage Positions by Department | Task Instructions

Manage Positions by Department > Personnel Details

Scenario: Budget | Department: FN06100100 - CREDIT & COLLECTIONS | Version: Working | Years: FY22 | Position

Requests: Base | Employee: EMPVacancy

Header | Salary | Other Compensation | **Allocation** | Calculated Compensation | Allocated Compensation

	Allocated Fund	Allocated Grant	Allocated Project	Allocated Activity	Allocation Percent
Allocation 1	G1001 - GENERAL FUND OPERATIONS	No_Grant	No_Project	No_Activity	100%
Allocation 2					
Allocation 3					
Allocation 4					
Allocation 5					
Total Check					100%

Task - Manage Positions by Department | Task Instructions

Manage Positions by Department > Personnel Details

Scenario: Budget | Department: FN06100100 - CREDIT & COLLECTIONS

Requests: Base | Employee: EMPVacancy

Header | Salary | Other Compensation | Allocation | **Calculated Compensation** | Allocated Compensation

		Oct	Nov	Dec	Jan	Feb
SG001188	Salary Amount	3,403.94	3,403.94	5,105.91	3,403.94	3,403.94
Current Year Salary	Salary Amount	3,403.94	3,403.94	5,105.91	3,403.94	3,403.94
Cost of Living Adjustment	Salary Amount	34.04	34.04	51.06	34.04	34.04
Total Salary	Total Compensation	3,437.98	3,437.98	5,156.97	3,437.98	3,437.98
PREMIUM PAY GSAF (7C)	Other Compensation Amount	140.00	140.00	210.00	140.00	140.00
Flex Benefits	Other Compensation Amount	84.62	84.62	126.92	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
Life Insurance Rate	Other Compensation Amount	7.26	7.26	10.89	7.26	7.26
Dental Plans	Other Compensation Amount	18.69	18.69	28.04	18.69	18.69
FRS INVESTMENT PLAN - REGULAR (I3)	Other Compensation Amount	310.93	310.93	466.39	310.93	310.93
Social Security Rate	Other Compensation Amount	221.83	221.83	332.75	221.83	221.83
Medicare Rate	Other Compensation Amount	51.88	51.88	77.82	51.88	51.88
Total Other Compensation	Total Compensation	1,989.05	1,989.05	2,983.59	1,989.05	1,989.05
Total Pay Element	Total Compensation	5,427.04	5,427.04	8,140.55	5,427.03	5,427.03

Task - Manage Positions by Department | Task Instructions

Manage Positions by Department > Personnel Details

Scenario: Budget | Department: FN06100100 - CREDIT & COLLECTIONS | Version: Working

Requests: Base | Employee: EMPVACANCY

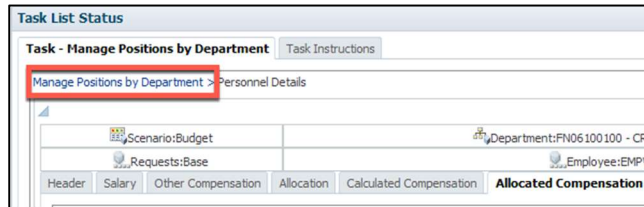
Header | Salary | Other Compensation | Allocation | Calculated Compensation | **Allocated Compensation**

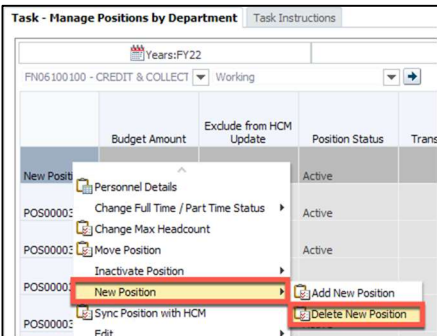

	Budget Amount	Allocated Account	Allocated Fund	Allocated Grant	Allocated Project	Allocated Activity	Allocation Percent	Allocated Job Code
SG001188								
Oct	3,403.94	5001100000 - EMPLOYEE REGULAR	G1001 - GENERAL FUND OPERATIONS	No_Grant	No_Project	No_Activity	100%	311 CALL CENTER SPEC - 001188
Nov	3,403.94	5001100000 - EMPLOYEE REGULAR	G1001 - GENERAL FUND OPERATIONS	No_Grant	No_Project	No_Activity	100%	311 CALL CENTER SPEC - 001188
Dec	5,105.91	5001100000 - EMPLOYEE REGULAR	G1001 - GENERAL FUND OPERATIONS	No_Grant	No_Project	No_Activity	100%	311 CALL CENTER SPEC - 001188
Jan	3,403.94	5001100000 - EMPLOYEE REGULAR	G1001 - GENERAL FUND OPERATIONS	No_Grant	No_Project	No_Activity	100%	311 CALL CENTER SPEC - 001188
Feb	3,403.94	5001100000 - EMPLOYEE REGULAR	G1001 - GENERAL FUND OPERATIONS	No_Grant	No_Project	No_Activity	100%	311 CALL CENTER SPEC - 001188
Mar	3,403.94	5001100000 - EMPLOYEE REGULAR	G1001 - GENERAL FUND OPERATIONS	No_Grant	No_Project	No_Activity	100%	311 CALL CENTER SPEC - 001188
Apr	3,403.94	5001100000 - EMPLOYEE REGULAR	G1001 - GENERAL FUND OPERATIONS	No_Grant	No_Project	No_Activity	100%	311 CALL CENTER SPEC - 001188
May	3,403.94	5001100000 - EMPLOYEE REGULAR	G1001 - GENERAL FUND OPERATIONS	No_Grant	No_Project	No_Activity	100%	311 CALL CENTER SPEC - 001188
Jun	3,403.94	5001100000 - EMPLOYEE REGULAR	G1001 - GENERAL FUND OPERATIONS	No_Grant	No_Project	No_Activity	100%	311 CALL CENTER SPEC - 001188
Jul	5,105.91	5001100000 - EMPLOYEE REGULAR	G1001 - GENERAL FUND OPERATIONS	No_Grant	No_Project	No_Activity	100%	311 CALL CENTER SPEC - 001188
Aug	3,403.94	5001100000 - EMPLOYEE REGULAR	G1001 - GENERAL FUND OPERATIONS	No_Grant	No_Project	No_Activity	100%	311 CALL CENTER SPEC - 001188
Sep	3,403.94	5001100000 - EMPLOYEE REGULAR	G1001 - GENERAL FUND OPERATIONS	No_Grant	No_Project	No_Activity	100%	311 CALL CENTER SPEC - 001188

FTE_PE | Sep | 1.00 Full Time Vacant FTE | G1001 - GENERAL FUND OPERATIONS | No_Grant | No_Project | No_Activity | 100% | 311 CALL CENTER SPEC - 001188

12

Select the " Manage Positions by Department" breadcrumb to return to the Manage Positions by Department form.



Step	Action	Notes
1	<p>Right click on the new position record and select "New Position ->Delete New Position".</p> 	
2	<p>In the run time prompt, select / enter the following: ->Select Position: Confirm the new position to delete Select Launch.</p> 	<p>This rule will delete the new position from the budget.</p>
3	<p>Confirm that the new position has been deleted from the department.</p>	<p>The delete rule cleared the allocated compensation for the new position. The operating database will be updated the next time the scheduled data maps run.</p>

Lesson 9: Terminate/Reactivate Employee


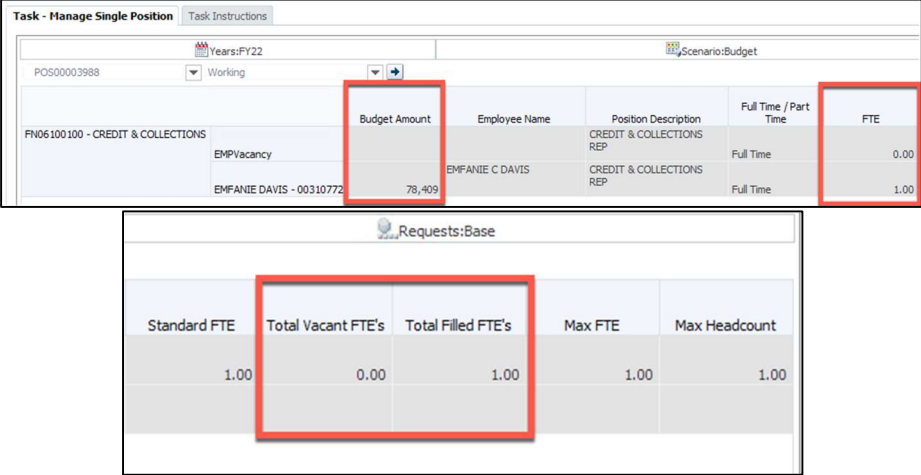
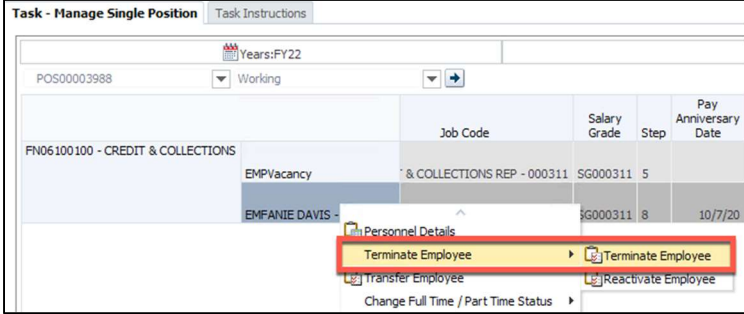
Lesson Overview


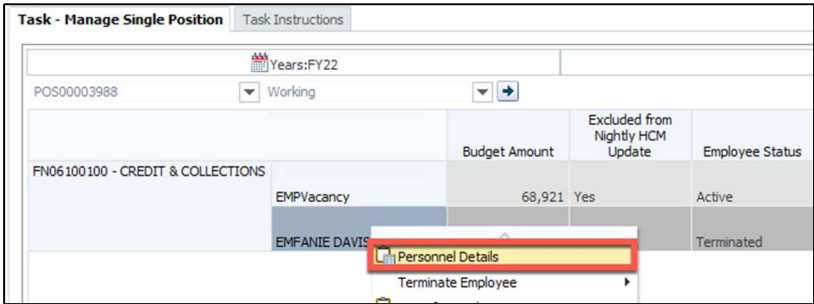
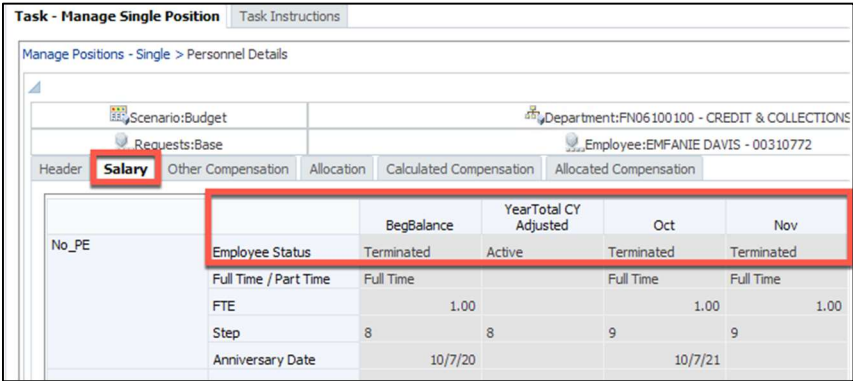
This lesson will guide users through the steps to terminate an employee and then reactivate a terminated employee in the budget year. This status change occurs at the employee level and impacts the vacancy calculation at the position level.

The steps listed below will navigate the user to the **Manage Single Position** task, but users can also make this change from **Manage Single Employee** or **Manage Employees by Department**.

In this lesson you will learn:

- Navigate to the Manage Single Position task
- Terminate and reactivate an employee
- Validate the results of the calculation

Step	Action	Notes
1	<p>From the home screen, navigate to the Manage Single Position form by going to My Task List → Personnel Management → Manage Personnel → Manage Single Position.</p> 	
2	<p>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.</p>	
3	<p>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</p> 	
4	<p>Right click on the employee record and select "Terminate Employee → Terminate Employee".</p> 	

<p>5</p>	<p>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 not be calculated</p> <p>Select Launch.</p> 	<p>This rule will clear calculated compensation for the employee starting in the selected start month but will apply termination pay in the start month.</p> <p>The rule will also create a vacancy in the position by increasing the Vacant FTE and ultimately the FTE for the vacancy member.</p>
<p>6</p>	<p>Right click on the employee record and select “Personnel Details”.</p> 	
<p>7</p>	<p>Select the Salary tab and confirm the Employee Status changes to Terminated in the selected start month.</p> 	
<p>8</p>	<p>Select the Other Compensation tab and confirm the sum of sick, holiday and vacation hours (from the header tab) appear in the selected start month on the termination row.</p>	

<p>9</p>	<p>Select the Calculated Compensation tab and confirm termination pay and taxes are calculated (and correct) in the termination start month. All other pay elements should be cleared starting in the start month.</p>	<p>These amounts will be mapped to the operating database (FINSTMT) during the next scheduled data map.</p>
<p>10</p>	<p>Select the Allocated Compensation tab and confirm termination pay is allocated correctly, the rest of the allocations end in the selected start month, and the allocated FTE (at the bottom) has been cleared.</p>	
<p>11</p>	<p>Select the "Manage Positions ->Single" breadcrumb to return to the Manage Single Position form.</p>	
<p>12</p>	<p>Right click on the EMPVacancy record and select "Personnel Details".</p>	

13

Select the Salary tab and confirm the FTE increases starting in start month you selected in the run time prompt.

Header	Salary	Other Compensation	Allocation	Calculated Compensation	Allocated Compensation
No_PE	Full Time / Part Time	Full Time	BegBalance	Year Total CY Adjusted	Oct
FTE	1.00				1.00
Max Headcount	1.00				1.00
Standard FTE	1.00				1.00
Step	5	5	5	5	5
SG000311	Pay Basis	Biveekly			
Step	5	5	5	5	5
Max Step	10				
L1 Step	11				
L2 Step	12				
L3 Step	13				
Budget Rate	1,648.70	1,648.70	1,648.70	1,648.70	1,648.70
Budget Rate Annualized			42,866.2000	42,866.2000	42,866.2000
Cost of Living Adjustment			0.01	0.01	0.01
Budget Rate Annualized			428.6620	428.6620	428.6620

14

Select the Calculated Compensation tab and confirm the vacancy is calculated correctly starting in the start month you selected.

Header	Salary	Other Compensation	Allocation	Calculated Compensation	Allocated Compensation
SG000311	Salary Amount			Oct	Nov
Current Year Salary	3,297.40			3,297.40	3,297.40
Cost of Living Adjustment	32.97			32.97	49.46
Total Salary	3,330.37			3,330.37	4,995.56
PREMIUM PAY (GSF) (7C)	Other Compensation Amount	140.00		140.00	210.00
Flex Benefits	Other Compensation Amount	84.62		84.62	126.92
Health Insurance Rate	Other Compensation Amount	1,153.85		1,153.85	1,730.77
Life Insurance Rate	Other Compensation Amount	7.03		7.03	10.55
Dental Plans	Other Compensation Amount	18.69		18.69	28.04
FRS INVESTMENT PLAN - REGULAR (I3)	Other Compensation Amount	301.58		301.58	452.36
Social Security Rate	Other Compensation Amount	215.16		215.16	322.75
Medicare Rate	Other Compensation Amount	50.32		50.32	75.48
Total Other Compensation	Total Compensation	1,971.25		1,971.25	2,956.87
Total Pay Element	Total Compensation	5,301.62		5,301.62	7,952.43

15

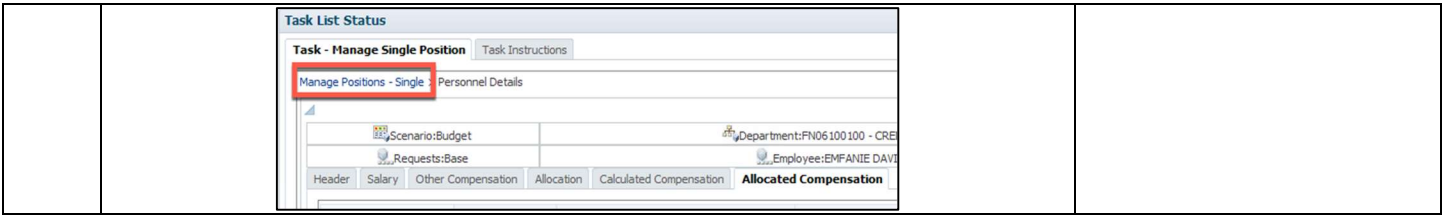
Select the Allocated Compensation tab and confirm the vacancy is allocated correctly starting in the selected start month and the FTE is allocated correctly (at the bottom of the form).

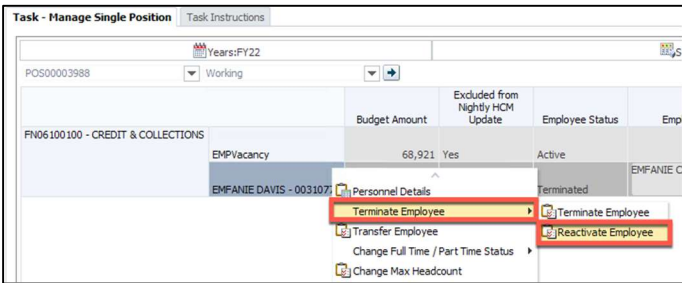

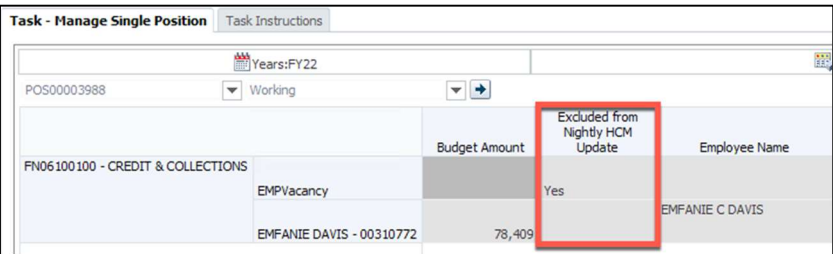
Header	Salary	Other Compensation	Allocation	Calculated Compensation	Allocated Compensation
SG000311	Budget Amount	Allocated Account	Allocated Fund	Allocated Grant	Allocated Project
Oct	3,297.40	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project
Nov	3,297.40	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project
Dec	4,946.10	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project
Jan	3,297.40	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project
Feb	3,297.40	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project
Mar	3,297.40	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project
Apr	3,297.40	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project
May	3,297.40	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project
Jun	3,297.40	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project
Jul	4,946.10	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project
Aug	3,297.40	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project
Sep	3,297.40	5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project
FTE_PE	Sep	1.00 Full Time Vacant FTE	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project

These amounts will be mapped to the operating database (FINSTMT) during the next scheduled data map.

16

Select the " Manage Positions ->Single" breadcrumb to return to the Manage Single Position form.



Step	Action	Notes
1	<p>Right click on the employee record and select "Terminate Employee → Reactivate Employee".</p> 	
2	<p>In the run time prompt, select / enter the following: ->Select Employee: Confirm the employee to sync</p> <p>Select Launch.</p> 	<p>This rule will reactivate the employee and reduce the vacancy.</p> <p>The rule will fail if the vacancy no longer exists to reactivate the employee.</p>
3	<p>Confirm the employee record and vacancy record have been reset to their values before the termination.</p>	
4	<p>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.</p> 	

Lesson 10: Update Accrued Balances

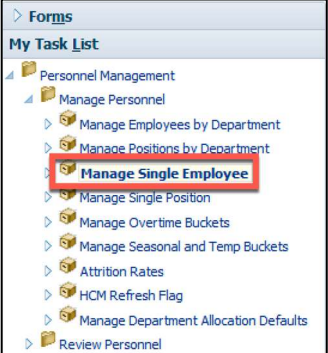
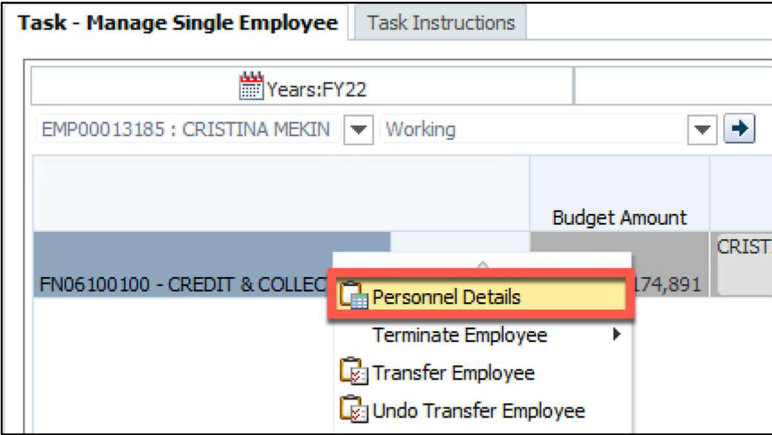
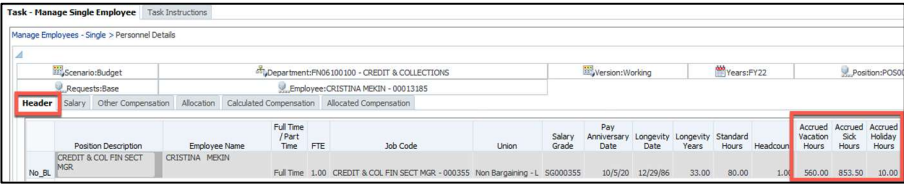
Lesson Overview

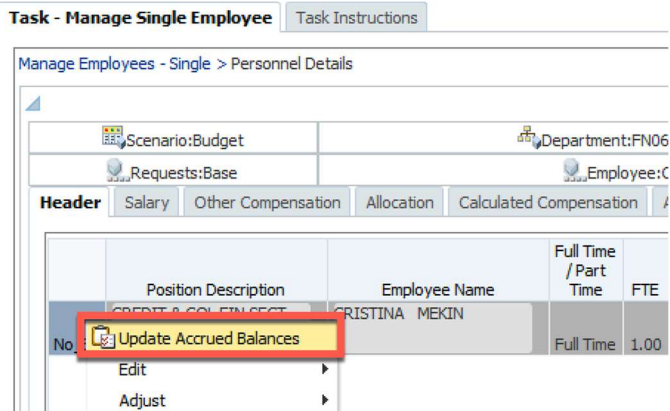
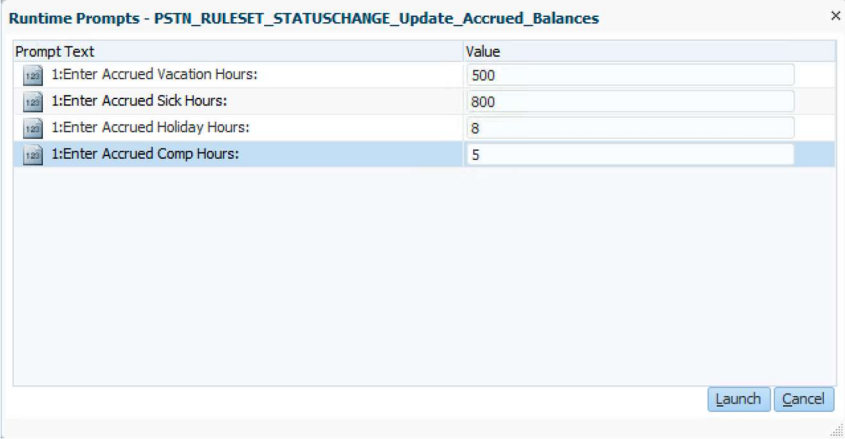
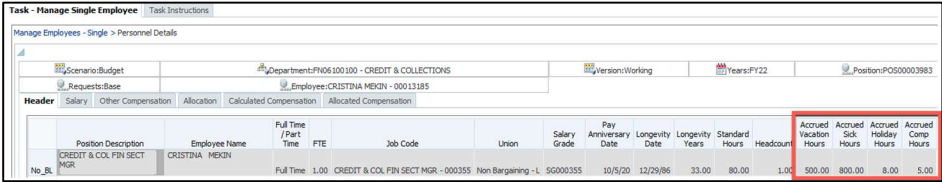
This lesson will guide users through the steps to update accrued balances in the budget year. This status change occurs at the employee level, not at the vacancy level.

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:

- Navigate to the Manage Single Employee task
- Update accrued balances in the budget year
- Validate the results of the calculation

Step	Action	Notes
1	<p>From the home screen, navigate to the Manage Single Employee form by going to My Task List → Personnel Management → Manage Personnel → Manage Single Employee.</p> 	
2	<p>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.</p>	
3	<p>Right click on the employee row and select "Personnel Details".</p> 	
4	<p>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.</p> 	<p>Make note of the accrued balances listed in the last three columns as you will be adjusting them in the next step.</p>

<p>5</p>	<p>To modify those accrued balances in the last three columns, right click on the No_BL row, then select "Update Accrued Balances" from the right click menu.</p> 	
<p>6</p>	<p>In the run time prompt, select / enter the following to update the accrued balances as necessary:</p> <ul style="list-style-type: none"> ->Enter Accrued Vacation Hours: enter a number of vacation hours ->Enter Accrued Sick Hours: enter a number of sick hours ->Enter Accrued Holiday Hours: enter a number of holiday hours ->Enter Accrued Comp Hours: enter a number of comp hours <p>Select Launch.</p> 	<p>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.</p>
<p>7</p>	<p>Once the rule finishes, verify that the accrued balances in the last 3-4 columns are the same as what you entered in the run time prompt.</p> 	<p>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.</p>

Lesson 11: Transfer Employee/Undo Transfer

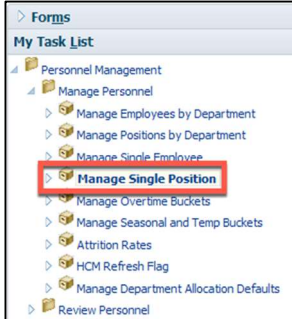
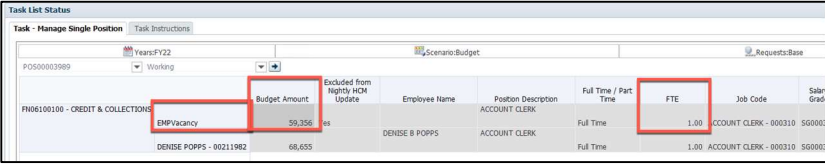

Lesson Overview

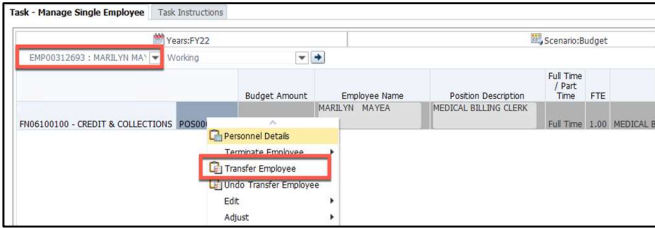

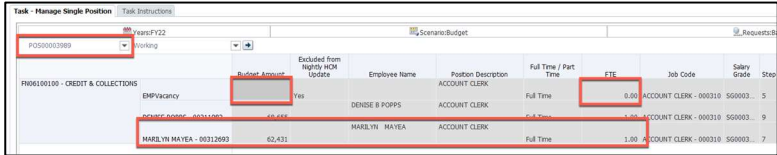
This lesson will guide users through the steps to transfer an employee to a different position and then undo a transfer in the budget year.

The steps listed below will navigate the user to the **Manage Single Position** task and **Manage Single Employee task**, but employee transfers can also be initiated from **Manage Employees by Department**.

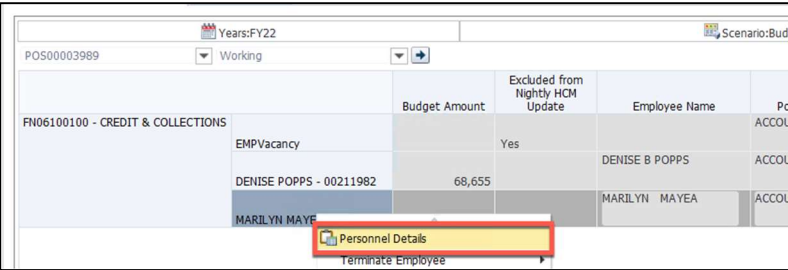

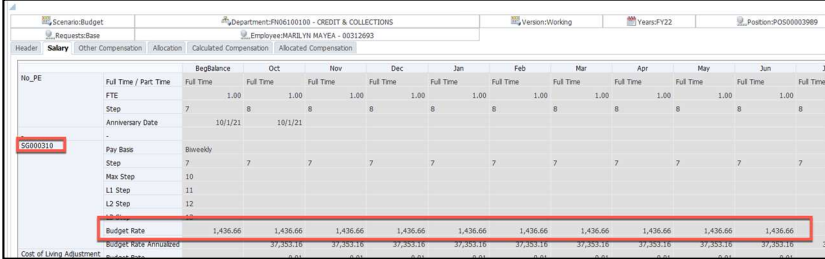
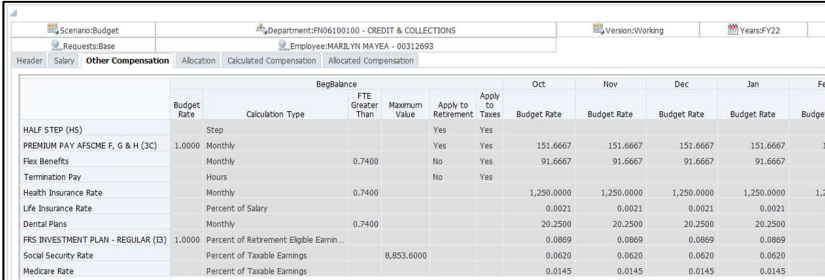
In this lesson you will learn:

- Navigate to the Manage Single Position task
- Navigate to the Manage Single Employee task
- Transfer an employee
- Undo an employee transfer
- Validate the results of the calculation

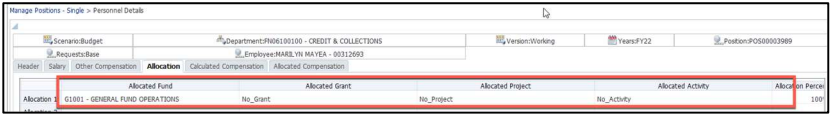
Step	Action	Notes
1	<p>From the home screen, navigate to the Manage Single Position form by going to My Task List ->Personnel Management ->Manage Personnel ->Manage Single Position.</p> 	
2	<p>Click on the drop-down arrow next to the Position dimension in the point of view (POV) and select a target position you want to move the employee into. Click the "Go" arrow to save your selection.</p>	
3	<p>The target position must have a vacancy available. If there isn't a vacancy, increase the max headcount on the target position.</p> 	<p>Note the target position number and target department number. You will need to enter these values in the Transfer Employee run time prompt</p>
4	<p>Navigate to the Manage Single Employee form under Personnel Management ->Manage Personnel ->Manage Single Employee.</p> 	
5	<p>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.</p>	

<p>6</p>	<p>Right click on the employee record you'd like to transfer and select "Transfer Employee".</p> 	
<p>7</p>	<p>In the run time prompt, select / enter the following:</p> <ul style="list-style-type: none"> ->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 <p>Select Launch.</p> 	<p>->The transfer rule will go find copy the employee and employee specific attributes into the target position / department.</p> <p>The rule will fail if you try to transfer an employee into a position without a vacancy.</p>
<p>8</p>	<p>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 target position you moved the employee into. Click the "Go" arrow to save your selection.</p>	
<p>9</p>	<p>Confirm the following for the target position:</p> <ul style="list-style-type: none"> ->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 	
<p>10</p>	<p>Right click on the EMPVacancy record in the target position and select "Personnel Details".</p>	

	<p>A screenshot of a software interface showing a list of employees. A context menu is open over the 'EMPVacancy' row for 'DENISE B POPPS'. The menu options are: 'Personnel Details' (highlighted with a red box), 'Terminate Employee', 'Transfer Employee', and 'Change Full Time / Part Time Status'.</p>	
<p>11</p>	<p>Select the Salary tab and confirm the vacancy FTE (FTE row) has been reduced starting in the start month you selected in the transfer run time prompt.</p> <p>A screenshot of the 'Salary' tab in the software. The 'FTE' row is highlighted with a red box. The values for 'FTE' are 1.00 for 'Year Total CY Adjusted' and 0.00 for the months 'Oct', 'Nov', 'Dec', 'Jan', 'Feb', 'Mar', 'Apr', and 'May'.</p>	<p>Budget amounts will not be calculated in months the vacancy has an FTE of 0</p>
<p>12</p>	<p>Select the Calculated Compensation tab and confirm the vacancy calculated compensation has been reduced starting in the start month you selected in the transfer run time prompt</p> <p>A screenshot of the 'Calculated Compensation' tab. The message 'There are no valid rows of data for this form.' is displayed, and 'No data to display' is shown below.</p>	
<p>13</p>	<p>Select the Allocated Compensation tab and confirm the vacancy allocated compensation has been reduced starting in the start month you selected in the transfer run time prompt.</p>	
<p>14</p>	<p>Confirm there is no allocated FTE for the vacancy (would be at the bottom row on the form)</p> <p>A screenshot of the 'Allocated Compensation' tab. The message 'There are no valid rows of data for this form.' is displayed, and 'No data to display' is shown below.</p>	<p>If the vacancy has been reduced to zero, otherwise an FTE will still remain.</p>
<p>15</p>	<p>Select the "Manage Positions ->Single" breadcrumb to return to the Manage Single Position form.</p> <p>A screenshot of the breadcrumb navigation path: 'Manage Positions - Single > Personnel Details'. The 'Manage Positions - Single' part is highlighted with a red box.</p>	

<p>16</p>	<p>Right click on the employee record that was transferred into the target position and select "Personnel Details".</p> 	
<p>17</p>	<p>Select the Header tab and confirm the pay anniversary date reflects the first day of the transfer month.</p> 	<p>The pay anniversary date gets updated for the employee in the target position to the first day of the transfer month. This could impact merit and step increase calculations on the target position.</p>
<p>18</p>	<p>Select the Salary tab and confirm the following: ->Confirm the Employee Status is "Inactive" for all of the months before the start month you selected in the transfer run time prompt ->Confirm the correct salary rate (if assigned a range salary grade) or step (if assigned a step grade) appears on the salary grade-budget rate row</p> 	<p>If the employee is assigned a range salary grade, there should be a 5% increase (assuming the increase doesn't put the employee over the max). If the employee is assigned a step salary grade, the step should be the first step with a budget rate higher than the current salary rate</p>
<p>19</p>	<p>Select the Other Compensation tab and confirm the employee's original list of other compensation elements all appear on the form.</p> 	<p>Other Compensation elements should have been copied from the source position to the target position</p>

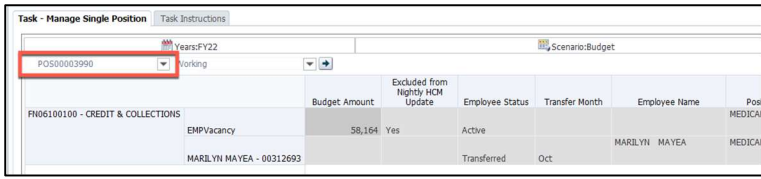
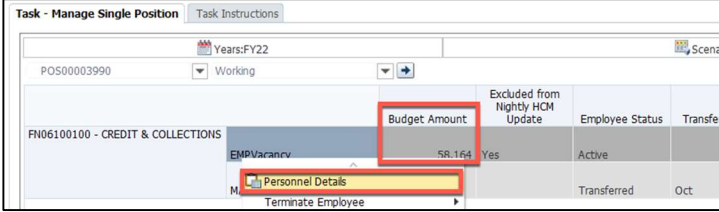
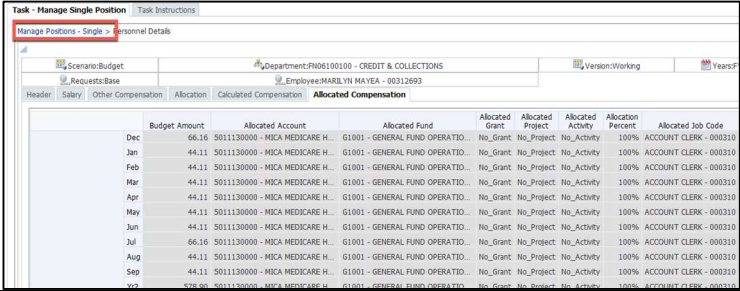
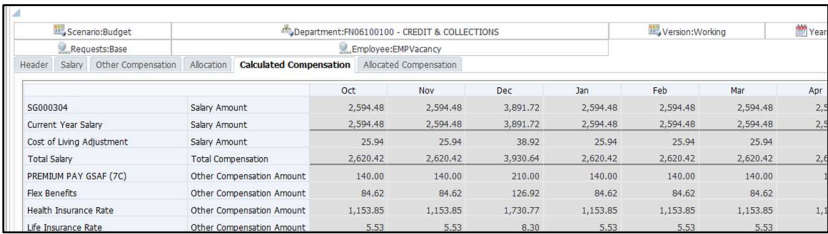
<p>20</p>	<p>Select the Allocation tab and confirm the department default allocation for the target position is shown on the form.</p>	
<p>21</p>	<p>Select the Calculated Compensation tab and confirm the employee calculated compensation starts in the start month and the calculated amounts are correct.</p>	
<p>22</p>	<p>Select the Allocated Compensation tab and confirm the employee allocated compensation starts in the start month and an allocated FTE appears for the employee (last row of the form).</p>	
<p>23</p>	<p>Select the "Manage Positions ->Single" breadcrumb to return to the Manage Single Position form.</p>	
<p>24</p>	<p>Because you have made a change to the target position--the "Exclude from HCM Update" column should now be marked as "Yes", indicating that this change is excluded from the nightly HCM refresh.</p>	<p>If you need to sync a target position with a transferred employee, make sure you sync the source position as well</p>



Header	Salary	Other Compensation	Allocation	Calculated Compensation	Allocated Compensation					
				Oct	Nov	Dec	Jan	Feb	Mar	Apr
\$6000310	Salary Amount			2,873.32	2,873.32	4,309.98	2,873.32	2,873.32	2,873.32	2,873.32
	Current Year Salary			2,873.32	2,873.32	4,309.98	2,873.32	2,873.32	2,873.32	2,873.32
	Cost of Living Adjustment	Salary Amount		28.73	28.73	43.10	28.73	28.73	28.73	28.73
	Total Salary			2,902.05	2,902.05	4,353.08	2,902.05	2,902.05	2,902.05	2,902.05
	HALF STEP (HS)	Salary Amount								
	PREMIUM PAY AFSOME F, G & H (3C)	Other Compensation Amount		140.00	140.00	210.00	140.00	140.00	140.00	140.00
	Flex Benefits	Other Compensation Amount		84.62	84.62	126.92	84.62	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	1,153.85
	Life Insurance Rate	Other Compensation Amount		6.13	6.13	9.19	6.13	6.13	6.13	6.13
	Dental Plans	Other Compensation Amount		18.69	18.69	28.04	18.69	18.69	18.69	18.69

Header	Salary	Other Compensation	Allocation	Calculated Compensation	Allocated Compensation							
				Budget Amount	Allocated Account	Allocated Fund	Allocated Grant	Allocated Project	Allocated Activity	Allocation Percent	Allocated Job Code	
				Dec	66.16	501130000 - MICA MEDICARE H.	G1001 - GENERAL FUND OPERATIO	No_Grant	No_Project	No_Activity	100%	ACCOUNT CLERK - 000310
				Jan	44.11	501130000 - MICA MEDICARE H.	G1001 - GENERAL FUND OPERATIO	No_Grant	No_Project	No_Activity	100%	ACCOUNT CLERK - 000310
				Feb	44.11	501130000 - MICA MEDICARE H.	G1001 - GENERAL FUND OPERATIO	No_Grant	No_Project	No_Activity	100%	ACCOUNT CLERK - 000310
				Mar	44.11	501130000 - MICA MEDICARE H.	G1001 - GENERAL FUND OPERATIO	No_Grant	No_Project	No_Activity	100%	ACCOUNT CLERK - 000310
				Apr	44.11	501130000 - MICA MEDICARE H.	G1001 - GENERAL FUND OPERATIO	No_Grant	No_Project	No_Activity	100%	ACCOUNT CLERK - 000310
				May	44.11	501130000 - MICA MEDICARE H.	G1001 - GENERAL FUND OPERATIO	No_Grant	No_Project	No_Activity	100%	ACCOUNT CLERK - 000310
				Jun	44.11	501130000 - MICA MEDICARE H.	G1001 - GENERAL FUND OPERATIO	No_Grant	No_Project	No_Activity	100%	ACCOUNT CLERK - 000310
				Jul	66.16	501130000 - MICA MEDICARE H.	G1001 - GENERAL FUND OPERATIO	No_Grant	No_Project	No_Activity	100%	ACCOUNT CLERK - 000310
				Aug	44.11	501130000 - MICA MEDICARE H.	G1001 - GENERAL FUND OPERATIO	No_Grant	No_Project	No_Activity	100%	ACCOUNT CLERK - 000310
				Sep	44.11	501130000 - MICA MEDICARE H.	G1001 - GENERAL FUND OPERATIO	No_Grant	No_Project	No_Activity	100%	ACCOUNT CLERK - 000310
				Y12	578.90	501130000 - MICA MEDICARE H.	G1001 - GENERAL FUND OPERATIO	No_Grant	No_Project	No_Activity	100%	ACCOUNT CLERK - 000310
				Y13	584.42	501130000 - MICA MEDICARE H.	G1001 - GENERAL FUND OPERATIO	No_Grant	No_Project	No_Activity	100%	ACCOUNT CLERK - 000310
				Y14	590.00	501130000 - MICA MEDICARE H.	G1001 - GENERAL FUND OPERATIO	No_Grant	No_Project	No_Activity	100%	ACCOUNT CLERK - 000310
				Y15	609.21	501130000 - MICA MEDICARE H.	G1001 - GENERAL FUND OPERATIO	No_Grant	No_Project	No_Activity	100%	ACCOUNT CLERK - 000310
				FTE_PIE	1.00	Full Time Filled FTE	G1001 - GENERAL FUND OPERATIO	No_Grant	No_Project	No_Activity	100%	ACCOUNT CLERK - 000310



<p>25</p>	<p>Click on the drop-down arrow next the Position dimension in the point of view and select the source position for the transferred employee. Click the "Go" arrow to save your Position selection.</p> 	<p>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.</p>
<p>26</p>	<p>Right click on the EMPVacancy record in the source position and select "Personnel Details"</p> 	
<p>27</p>	<p>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.</p> 	
<p>28</p>	<p>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.</p> 	
<p>29</p>	<p>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.</p>	

Header	Salary	Other Compensation	Allocation	Calculated Compensation	Allocated Compensation		
Scenario: Budget	Department: FN06100100 - CREDIT & COLLECTIONS				Version: Working		
Request: Base	Employee: EMPVacancy				Years: FY22		
Budget Amount	Allocated Account	Allocated Fund	Allocated Grant	Allocated Project	Allocated Activity	Allocation Percent	Allocated Job Code
Oct	2,594.48 5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Nov	2,594.48 5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Dec	3,891.72 5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Jan	2,594.48 5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Feb	2,594.48 5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Mar	2,594.48 5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Apr	2,594.48 5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
May	2,594.48 5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Jun	2,594.48 5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION O	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)

Header	Salary	Other Compensation	Allocation	Calculated Compensation	Employee: EMPVacancy		
Scenario: Budget	Department: FN06100100 - CREDIT & COLLECTIONS				Version: Working		
Request: Base	Employee: EMPVacancy				Years: FY22		
Budget Amount	Allocated Account	Allocated Fund	Allocated Grant	Allocated Project	Allocated Activity	Allocation Percent	Allocated Job Code
Dec	60.04 5011130000 - MICA MEDICARE H	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Jan	40.03 5011130000 - MICA MEDICARE H	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Feb	40.03 5011130000 - MICA MEDICARE H	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Mar	40.03 5011130000 - MICA MEDICARE H	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Apr	40.03 5011130000 - MICA MEDICARE H	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
May	40.03 5011130000 - MICA MEDICARE H	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Jun	40.03 5011130000 - MICA MEDICARE H	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Jul	60.04 5011130000 - MICA MEDICARE H	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Aug	40.03 5011130000 - MICA MEDICARE H	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Sep	40.03 5011130000 - MICA MEDICARE H	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Y2	525.28 5011130000 - MICA MEDICARE H	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Y3	530.27 5011130000 - MICA MEDICARE H	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Y4	535.31 5011130000 - MICA MEDICARE H	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Y5	540.40 5011130000 - MICA MEDICARE H	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
FTE PE	1.00 Full Time Vacant FTE	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003

31 Select the "Manage Positions ->Single" breadcrumb to return to the Manage Single Position form.

Manage Positions - Single - Personnel Details

Header	Salary	Other Compensation	Allocation	Calculated Compensation	Allocated Compensation		
Scenario: Budget	Department: FN06100100 - CREDIT & COLLECTIONS				Version: Working		
Request: Base	Employee: EMPVacancy				Years: FY22		
Budget Amount	Allocated Account	Allocated Fund	Allocated Grant	Allocated Project	Allocated Activity	Allocation Percent	Allocated Job Code
Oct	2,594.48 5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Nov	2,594.48 5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Dec	3,891.72 5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Jan	2,594.48 5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Feb	2,594.48 5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Mar	2,594.48 5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003
Apr	2,594.48 5001100000 - EMPLOYEE REGULAR	G5004 - CREDIT & COLLECTION O	No_Grant	No_Project	No_Activity	100%	MEDICAL BILLING CLERK - 0003

32 Right click on the employee record that was transferred from the source position and select "Personnel Details".

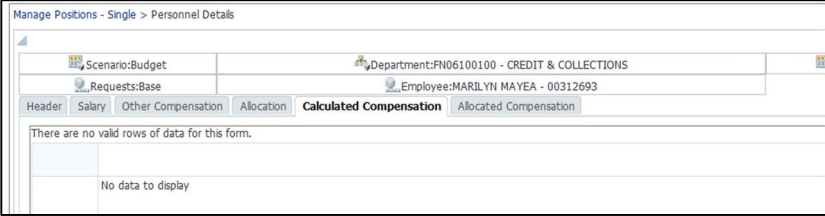
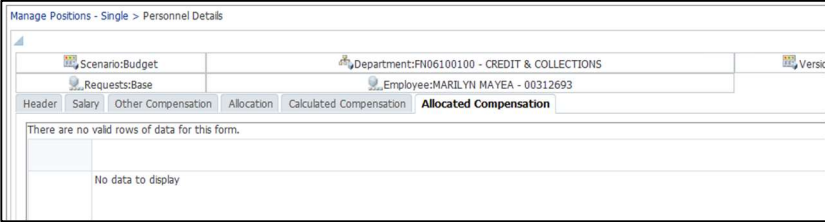

Task - Manage Single Position


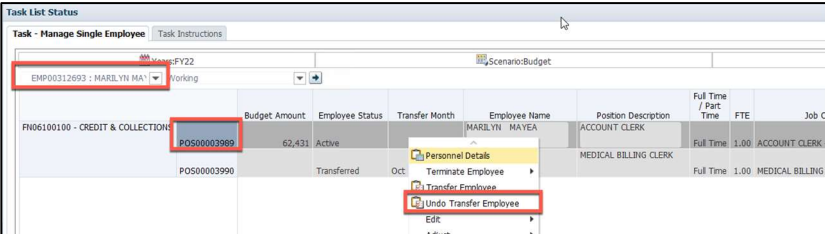
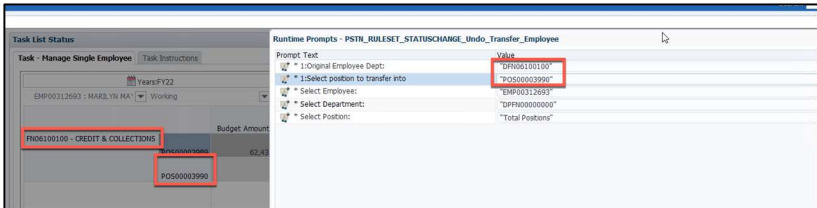
Position	Version	Budget Amount	Excluded from Highly HCM Update	Employee Status
FN06100100 - CREDIT & COLLECTIONS	Working	50,164	Yes	Active
MARILYN MAYE ARBER	Transferred			Transferred

Personnel Details

33 Select the Salary tab and confirm the Employee Status is "Transferred" for all of the months starting at start month you selected in the transfer run time prompt.

Header	Salary	Other Compensation	Allocation	Calculated Compensation	Allocated Compensation						
Scenario: Budget	Department: FN06100100 - CREDIT & COLLECTIONS				Version: Working						
Request: Base	Employee: MARILYN MAYE - 00312693				Years: FY22						
Position: P05000											
No. PE	Employee Status	Transferred	Active	Transferred	Transferred	Transferred	Transferred	Transferred	Transferred	Transferred	Transferred
FTE	Full Time	1.00	Full Time	1.00	Full Time	1.00	Full Time	1.00	Full Time	1.00	Full Time
Step	7	7	8	8	8	8	8	8	8	8	8
Anniversary Date	10/7/20		10/7/21								
Pay Basis	Biweekly										
Step	7	7	7	7	7	7	7	7	7	7	7
Max Step	10										
L1 Step	11										
L2 Step	12										
L3 Step	13										

<p>34</p>	<p>Select the Calculated Compensation tab and confirm the employee calculated compensation is cleared starting in the start month and the calculated amounts are correct.</p> 	
<p>35</p>	<p>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).</p> 	
<p>36</p>	<p>Select the "Manage Positions ->Single" breadcrumb to return to the manage form.</p> 	
<p>37</p>	<p>Because you have made a change to the source position--the "Exclude from HCM Update" column should now be marked as "Yes", indicating that this change is excluded from the nightly HCM refresh.</p>	

Step	Action	Notes
1	<p>Navigate to the Manage Single Employee form under Personnel Management ->Manage Personnel ->Manage Single Employee.</p> 	
2	<p>Click on the drop-down arrow next to the Employee dimension in the point of view (POV) and select the employee number you transferred in previously. Click the "Go" arrow to save your selection.</p>	
3	<p>Right click on the position record you want to undo and select "Undo Transfer Employee".</p> 	
4	<p>In the run time prompt, select / enter the following:</p> <ul style="list-style-type: none"> ->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 <p>Select Launch.</p> 	<p>The undo transfer rule will place the employee back in their original position and copy their employee specific attributes into the position.</p>

5

Navigate to the Manage Positions by Department form under Personnel Management → Manage Personnel → Manage Positions by Department and confirm the following:

->The vacancy that was created for the original position in the previous script is gone

->There is a new vacancy created for the position we wanted to transfer the employee into in the previous script

Task - Manage Single Position		Task Instructions		Scenario:Budget	
POS00003989	Working				
FN06100100 - CREDIT & COLLECTION	EMP Vacancy	Budget Amount: 59,356	Excluded from Highly HCM Update: Yes	Employee Name: DENISE B POPPS	Position Description: ACCOUNT CLERK
				Full Time / Part Time: Full Time	FTE: 1.00
					ACCOUNT
DENSE POPPS - 00211982		68,655			Full Time 1.00 ACCO

Task - Manage Single Position		Task Instructions		Scenario:Budget	
POS00003990	Working				
FN06100100 - CREDIT & COLLECTIONS	EMP Vacancy	Budget Amount: 62,833	Excluded from Highly HCM Update: Yes	Employee Name: MARILYN MAYEA	Position Description: MEDICAL BILLING CLERK
				Full Time / Part Time: Full Time	FTE: 0.00
					MEDICAL BILL
MARILYN MAYEA - 00312693					Full Time 1.00 MEDICAL BILL

Lesson 12: Change Salary ->Step


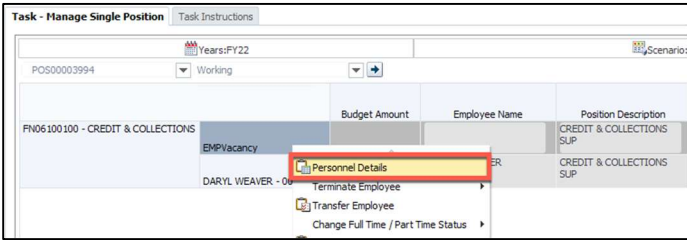
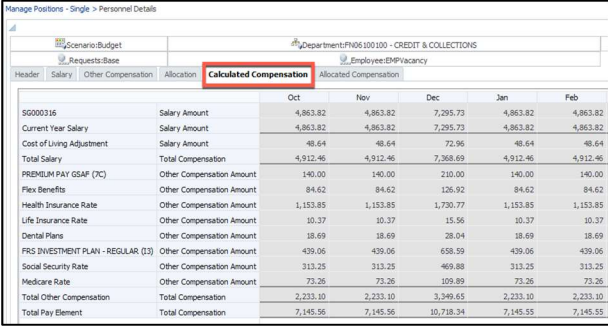
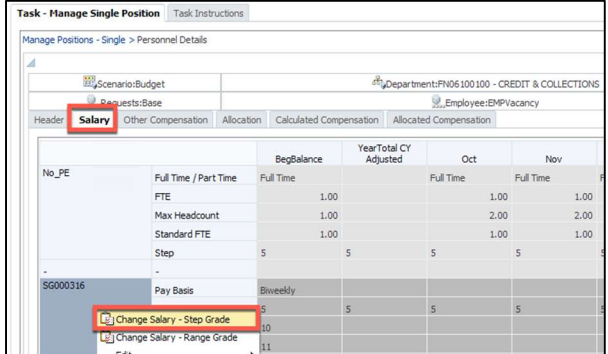
Lesson Overview

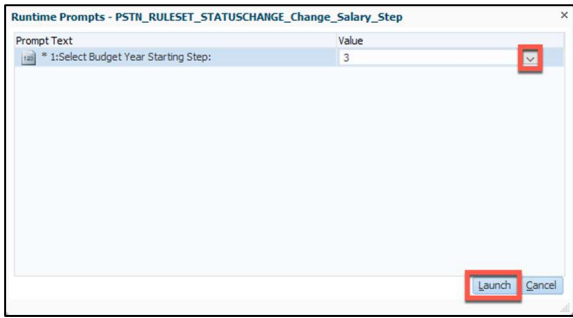
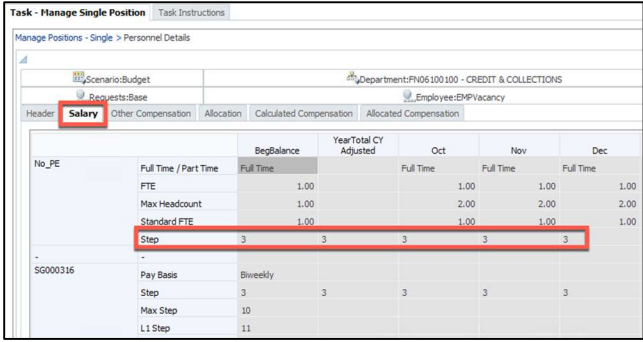
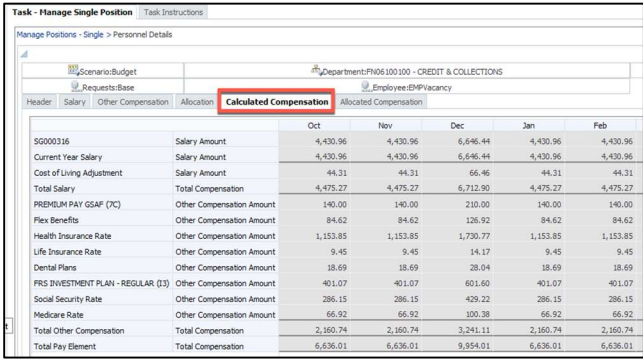
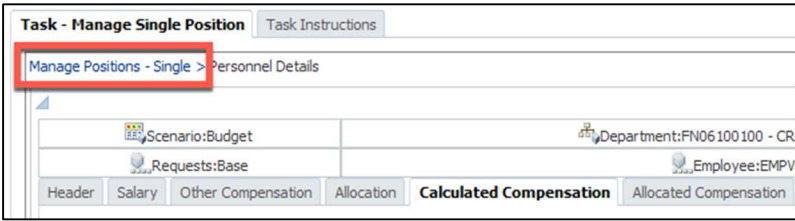
This lesson will guide users through the steps to change the step assigned to a vacancy or employee on a step salary grade in the budget year. This status change is specific to a single employee or vacancy record.

The steps listed below will navigate the user to the **Manage Single Position** task, but users can also make this change from any of the manage position or employee forms.

In this lesson you will learn:

- Navigate to the Personnel Details composite form
- Change the step assigned to an employee or vacancy
- Validate the results of the calculation

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

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

Lesson 13: Change Salary ->Range

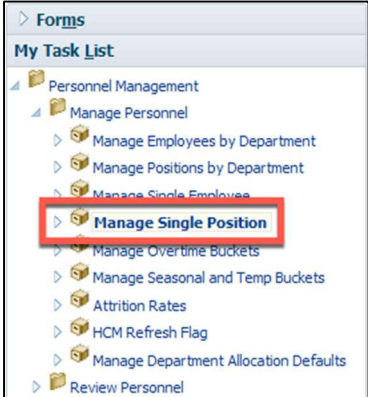
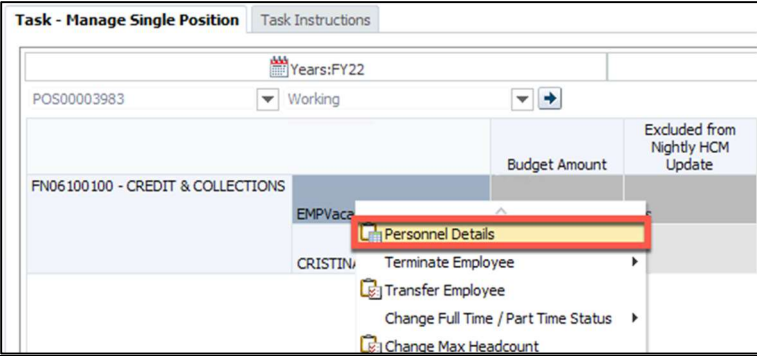
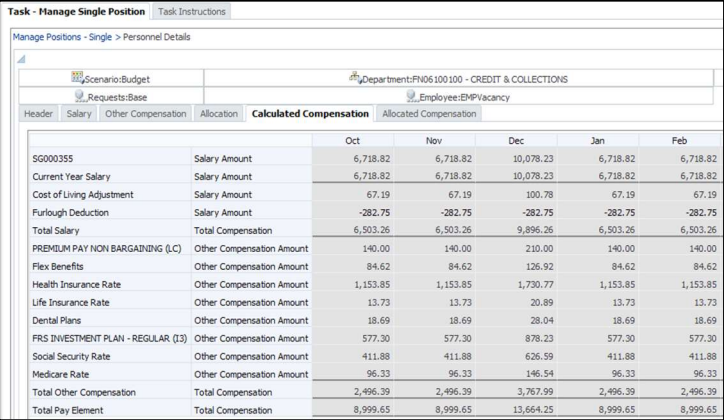
Lesson Overview

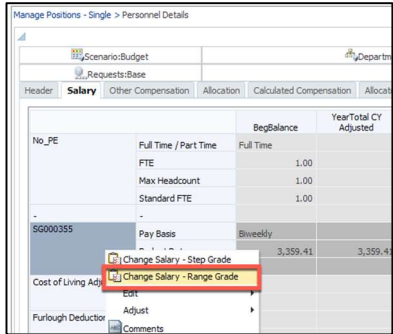
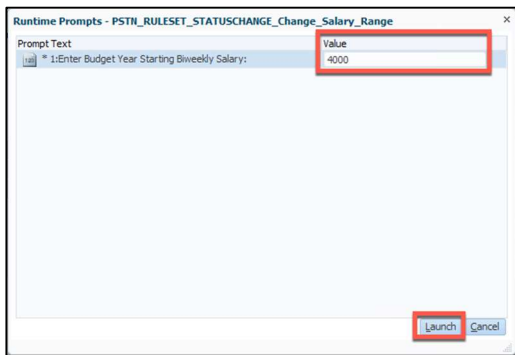
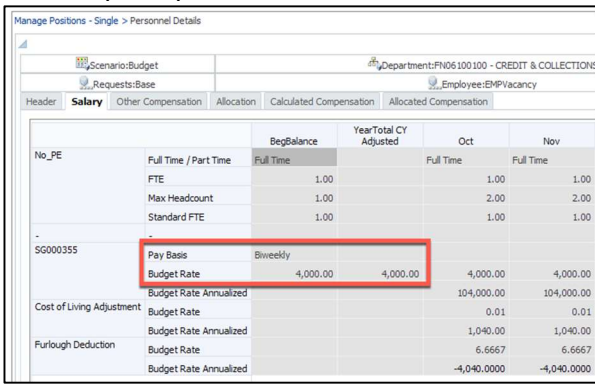
This lesson will guide users through the steps to change the salary rate assigned to a vacancy or employee on a range salary grade in the budget year. This status change is specific to a single employee or vacancy record.

The steps listed below will navigate the user to the **Manage Single Position** task, but users can also make this change from any of the manage position or employee forms.

In this lesson you will learn:

- Navigate to the Personnel Details composite form
- Change the salary rate assigned to a vacancy or employee on a range salary grade
- Validate the results of the calculation

Step	Action	Notes																																																																																																																
1	<p>From the home screen, navigate to the Manage Single Position form by going to My Task List ->Personnel Management ->Manage Personnel ->Manage Single Position.</p> 																																																																																																																	
2	<p>Click on the drop-down arrow next to the Position dimension in the point of view (POV) and select a Range Salary Grade Position with a Vacancy. Click the "Go" arrow to save your selection.</p>	<p>You can also change the range salary rate assigned to an existing employee</p>																																																																																																																
3	<p>Right click on the vacancy record and select "Personnel Details".</p> 																																																																																																																	
4	<p>Select the Calculated Compensation tab and note the calculated salary amount for the salary grade.</p>  <table border="1" data-bbox="354 1392 1073 1808"> <thead> <tr> <th colspan="2"></th> <th>Oct</th> <th>Nov</th> <th>Dec</th> <th>Jan</th> <th>Feb</th> </tr> </thead> <tbody> <tr> <td>SG000355</td> <td>Salary Amount</td> <td>6,718.82</td> <td>6,718.82</td> <td>10,078.23</td> <td>6,718.82</td> <td>6,718.82</td> </tr> <tr> <td></td> <td>Current Year Salary</td> <td>6,718.82</td> <td>6,718.82</td> <td>10,078.23</td> <td>6,718.82</td> <td>6,718.82</td> </tr> <tr> <td></td> <td>Cost of Living Adjustment</td> <td>67.19</td> <td>67.19</td> <td>100.78</td> <td>67.19</td> <td>67.19</td> </tr> <tr> <td></td> <td>Furlough Deduction</td> <td>-282.75</td> <td>-282.75</td> <td>-282.75</td> <td>-282.75</td> <td>-282.75</td> </tr> <tr> <td></td> <td>Total Salary</td> <td>6,503.26</td> <td>6,503.26</td> <td>9,896.26</td> <td>6,503.26</td> <td>6,503.26</td> </tr> <tr> <td></td> <td>PREMIUM PAY NON BARGAINING (L.C)</td> <td>140.00</td> <td>140.00</td> <td>210.00</td> <td>140.00</td> <td>140.00</td> </tr> <tr> <td></td> <td>Flex Benefits</td> <td>84.62</td> <td>84.62</td> <td>126.92</td> <td>84.62</td> <td>84.62</td> </tr> <tr> <td></td> <td>Health Insurance Rate</td> <td>1,153.85</td> <td>1,153.85</td> <td>1,730.77</td> <td>1,153.85</td> <td>1,153.85</td> </tr> <tr> <td></td> <td>Life Insurance Rate</td> <td>13.73</td> <td>13.73</td> <td>20.89</td> <td>13.73</td> <td>13.73</td> </tr> <tr> <td></td> <td>Dental Plans</td> <td>18.69</td> <td>18.69</td> <td>28.04</td> <td>18.69</td> <td>18.69</td> </tr> <tr> <td></td> <td>FRS INVESTMENT PLAN - REGULAR (I3)</td> <td>577.30</td> <td>577.30</td> <td>878.23</td> <td>577.30</td> <td>577.30</td> </tr> <tr> <td></td> <td>Social Security Rate</td> <td>411.88</td> <td>411.88</td> <td>626.59</td> <td>411.88</td> <td>411.88</td> </tr> <tr> <td></td> <td>Medicare Rate</td> <td>96.33</td> <td>96.33</td> <td>146.54</td> <td>96.33</td> <td>96.33</td> </tr> <tr> <td></td> <td>Total Other Compensation</td> <td>2,496.39</td> <td>2,496.39</td> <td>3,767.99</td> <td>2,496.39</td> <td>2,496.39</td> </tr> <tr> <td></td> <td>Total Pay Element</td> <td>8,999.65</td> <td>8,999.65</td> <td>13,664.25</td> <td>8,999.65</td> <td>8,999.65</td> </tr> </tbody> </table>			Oct	Nov	Dec	Jan	Feb	SG000355	Salary Amount	6,718.82	6,718.82	10,078.23	6,718.82	6,718.82		Current Year Salary	6,718.82	6,718.82	10,078.23	6,718.82	6,718.82		Cost of Living Adjustment	67.19	67.19	100.78	67.19	67.19		Furlough Deduction	-282.75	-282.75	-282.75	-282.75	-282.75		Total Salary	6,503.26	6,503.26	9,896.26	6,503.26	6,503.26		PREMIUM PAY NON BARGAINING (L.C)	140.00	140.00	210.00	140.00	140.00		Flex Benefits	84.62	84.62	126.92	84.62	84.62		Health Insurance Rate	1,153.85	1,153.85	1,730.77	1,153.85	1,153.85		Life Insurance Rate	13.73	13.73	20.89	13.73	13.73		Dental Plans	18.69	18.69	28.04	18.69	18.69		FRS INVESTMENT PLAN - REGULAR (I3)	577.30	577.30	878.23	577.30	577.30		Social Security Rate	411.88	411.88	626.59	411.88	411.88		Medicare Rate	96.33	96.33	146.54	96.33	96.33		Total Other Compensation	2,496.39	2,496.39	3,767.99	2,496.39	2,496.39		Total Pay Element	8,999.65	8,999.65	13,664.25	8,999.65	8,999.65	
		Oct	Nov	Dec	Jan	Feb																																																																																																												
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	Social Security Rate	411.88	411.88	626.59	411.88	411.88																																																																																																												
	Medicare Rate	96.33	96.33	146.54	96.33	96.33																																																																																																												
	Total Other Compensation	2,496.39	2,496.39	3,767.99	2,496.39	2,496.39																																																																																																												
	Total Pay Element	8,999.65	8,999.65	13,664.25	8,999.65	8,999.65																																																																																																												

<p>5</p>	<p>Select the Salary tab. Then right click on the salary grade and select “Change Salary ->Range Grade”.</p> 	
<p>6</p>	<p>In the run time prompt, select / enter the following: ->New biweekly rate. Select Launch.</p> 	<p>If running this rule for an employee, the salary rate entered should be the employee’s salary rate going into the budget year</p> <p>The rule will fail if you enter a biweekly amount less than the minimum or greater than the maximum</p>
<p>7</p>	<p>Confirm the budget rate amount has been updated based on the rate you entered in the run time prompt.</p> 	
<p>8</p>	<p>Select the Calculated Compensation tab and confirm the calculated salary amount for the salary grade that has been updated.</p>	

Header	Salary	Other Compensation	Allocation	Calculated Compensation	Allocated Compensation							
				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 Adjustment	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 BARGAINING (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 - 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 Compensation	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			

9 Select the "Manage Positions ->Single" breadcrumb to return to the Manage Single Position form.

10 Because you have made a change to the position--the "Exclude from HCM Update" column should now be marked as "Yes", indicating that this change is excluded from the nightly HCM refresh.

Lesson 14: Add/Delete Pay Component


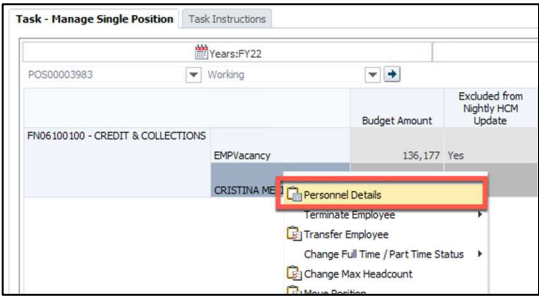
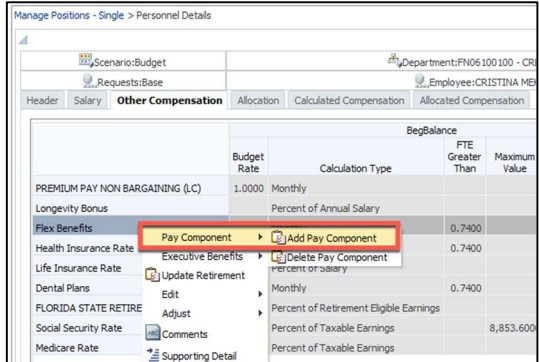
Lesson Overview

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 **Manage Single Position** task, but users can also make this change from any of the manage position or employee forms.

In this lesson you will learn:

- Navigate to the Personnel Details composite form
- Add and delete a pay component assigned to an employee or vacancy
- Validate the results of the calculation

Step	Action	Notes
1	<p>From the home screen, navigate to the Manage Single Position form by going to My Task List → Personnel Management → Manage Personnel → Manage Single Position.</p> 	
2	<p>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.</p>	<p>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)</p>
3	<p>Right click on the employee record and select "Personnel Details".</p> 	<p>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</p>
4	<p>Select the Other Compensation tab, then right click on the data form and select "Pay Component ->Add Pay Component".</p> 	

5 In the run time prompt, select / enter the following:
 ->Select Pay Component: Use the member selector to select the pay component to add to the employee in the budget year.
 Select Launch.

The screenshot shows a 'Runtime Prompts - PSTN_RULESET_STATUSCHANGE_Add_Pay_Component' dialog box. The 'Prompt Text' field contains '* 1:Select Pay Component:'. The 'Value' field contains 'PEXN'. The 'Launch' button is highlighted with a red box.

The pay component you selected will be applied for the entire budget year.

6 Confirm the pay component now appears on the form with its correct rate.

The screenshot shows the 'Other Compensation' tab in the Personnel Details form. The 'NOT MEDICAL ELIGIBILITY 5% DEDUCTION (N)' row is highlighted with a red box, showing a budget rate of 1.0000.

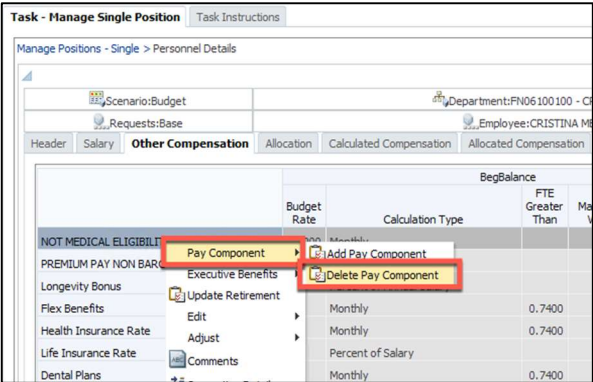
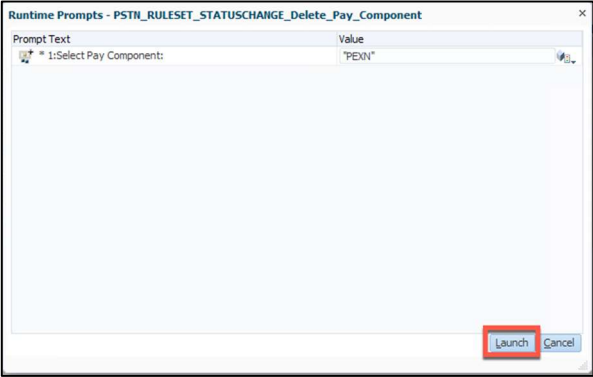
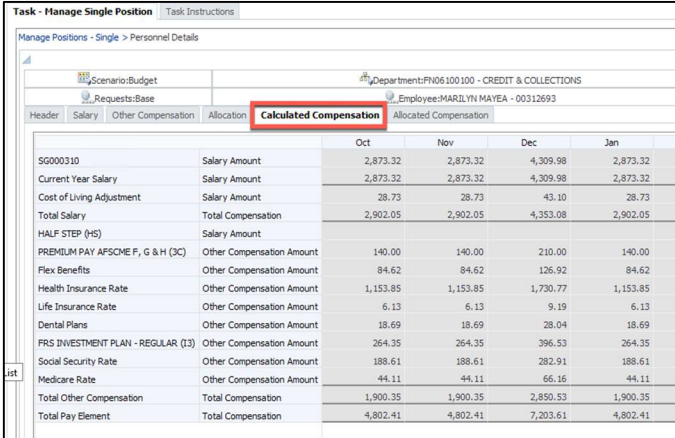
Header	Salary	Other Compensation	Allocation	Calculated Compensation	Allocated Compensation
BegBalance					
		Budget Rate	Calculation Type	FTE Greater Than	Maximum Value
		1.0000	Monthly		
		1.0000	Monthly		
			Percent of Annual Salary		
			Monthly	0.7400	
			Monthly	0.7400	
			Percent of Salary		
			Monthly	0.7400	
		1.0000	Percent of Retirement Eligible Earnings		
			Percent of Taxable Earnings		8,853.6000
			Percent of Taxable Earnings		

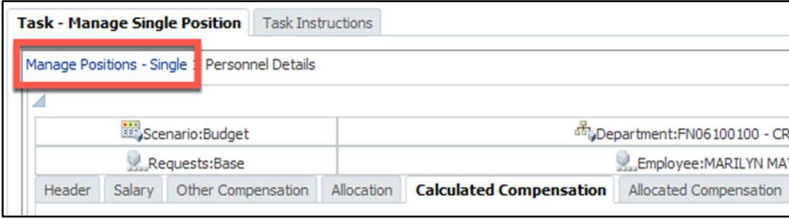
If you assigned a step pay component to a range employee or vacancy, the step should translate to a 5% increase.

7 Select the Calculated Compensation tab and confirm the pay component has been calculated correctly.

The screenshot shows the 'Calculated Compensation' tab in the Personnel Details form. The table below shows the calculated compensation amounts for months Oct, Nov, Dec, Jan, and Feb.

Header	Salary	Other Compensation	Allocation	Calculated Compensation	Allocated Compensation
				Oct	Nov
				Dec	Jan
				Feb	
SG000355	Salary Amount			9,580.03	9,580.03
	Current Year Salary			9,580.03	9,580.03
	Merit Broadband			362.61	362.61
	Cost of Living Adjustment			99.15	99.15
	Furlough Deduction			-417.25	-417.25
	Total Salary			9,624.54	9,624.54
	NOT MEDICAL ELIGIBILITY 5% DEDUCTION (N)	Other Compensation Amount		0.00	0.00
	PREMIUM PAY NON BARGAINING (LC)	Other Compensation Amount		140.00	140.00
	Longevity Bonus	Other Compensation Amount			3,818.60
	Flex Benefits	Other Compensation Amount		84.62	84.62
	Health Insurance Rate	Other Compensation Amount		1,153.85	1,153.85
	Life Insurance Rate	Other Compensation Amount		20.32	20.32
	Dental Plans	Other Compensation Amount		18.69	18.69
	FLORIDA STATE RETIREMENT SYSTEM (21)	Other Compensation Amount		848.54	848.54
	Social Security Rate	Other Compensation Amount		605.40	605.40
	Medicare Rate	Other Compensation Amount		141.59	141.59
	Total Other Compensation	Total Compensation		3,013.00	3,013.00
	Total Pay Element	Total Compensation		12,637.54	12,637.54

Step	Action	Notes																																																																																																
1	<p>Select the Other Compensation tab, then right click on the pay component you just added and select "Pay Component ->Delete Pay Component".</p> 																																																																																																	
2	<p>In the run time prompt, select / enter the following: ->Select Pay Component: Confirm the pay component to delete Select Launch.</p> 	<p>The pay component you delete will apply to the entire budget year</p>																																																																																																
3	<p>Confirm the pay component no longer appears on the form</p>																																																																																																	
4	<p>Select the Calculated Compensation tab and confirm the pay component is no longer being calculated.</p>  <table border="1" data-bbox="375 1440 1045 1875"> <thead> <tr> <th colspan="2"></th> <th>Oct</th> <th>Nov</th> <th>Dec</th> <th>Jan</th> </tr> </thead> <tbody> <tr> <td>SG000310</td> <td>Salary Amount</td> <td>2,873.32</td> <td>2,873.32</td> <td>4,309.98</td> <td>2,873.32</td> </tr> <tr> <td></td> <td>Current Year Salary</td> <td>2,873.32</td> <td>2,873.32</td> <td>4,309.98</td> <td>2,873.32</td> </tr> <tr> <td></td> <td>Cost of Living Adjustment</td> <td>28.73</td> <td>28.73</td> <td>43.10</td> <td>28.73</td> </tr> <tr> <td></td> <td>Total Salary</td> <td>2,902.05</td> <td>2,902.05</td> <td>4,353.08</td> <td>2,902.05</td> </tr> <tr> <td>HALF STEP (HS)</td> <td>Salary Amount</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td>PREMIUM PAY AFSOME F, G & H (3C)</td> <td>140.00</td> <td>140.00</td> <td>210.00</td> <td>140.00</td> </tr> <tr> <td></td> <td>Flex Benefits</td> <td>84.62</td> <td>84.62</td> <td>126.92</td> <td>84.62</td> </tr> <tr> <td></td> <td>Health Insurance Rate</td> <td>1,153.85</td> <td>1,153.85</td> <td>1,730.77</td> <td>1,153.85</td> </tr> <tr> <td></td> <td>Life Insurance Rate</td> <td>6.13</td> <td>6.13</td> <td>9.19</td> <td>6.13</td> </tr> <tr> <td></td> <td>Dental Plans</td> <td>18.69</td> <td>18.69</td> <td>28.04</td> <td>18.69</td> </tr> <tr> <td></td> <td>FRS INVESTMENT PLAN - REGULAR (I3)</td> <td>264.35</td> <td>264.35</td> <td>396.53</td> <td>264.35</td> </tr> <tr> <td></td> <td>Social Security Rate</td> <td>188.61</td> <td>188.61</td> <td>282.91</td> <td>188.61</td> </tr> <tr> <td></td> <td>Medicare Rate</td> <td>44.11</td> <td>44.11</td> <td>66.16</td> <td>44.11</td> </tr> <tr> <td></td> <td>Total Other Compensation</td> <td>1,900.35</td> <td>1,900.35</td> <td>2,850.53</td> <td>1,900.35</td> </tr> <tr> <td></td> <td>Total Pay Element</td> <td>4,802.41</td> <td>4,802.41</td> <td>7,203.61</td> <td>4,802.41</td> </tr> </tbody> </table>			Oct	Nov	Dec	Jan	SG000310	Salary Amount	2,873.32	2,873.32	4,309.98	2,873.32		Current Year Salary	2,873.32	2,873.32	4,309.98	2,873.32		Cost of Living Adjustment	28.73	28.73	43.10	28.73		Total Salary	2,902.05	2,902.05	4,353.08	2,902.05	HALF STEP (HS)	Salary Amount						PREMIUM PAY AFSOME F, G & H (3C)	140.00	140.00	210.00	140.00		Flex Benefits	84.62	84.62	126.92	84.62		Health Insurance Rate	1,153.85	1,153.85	1,730.77	1,153.85		Life Insurance Rate	6.13	6.13	9.19	6.13		Dental Plans	18.69	18.69	28.04	18.69		FRS INVESTMENT PLAN - REGULAR (I3)	264.35	264.35	396.53	264.35		Social Security Rate	188.61	188.61	282.91	188.61		Medicare Rate	44.11	44.11	66.16	44.11		Total Other Compensation	1,900.35	1,900.35	2,850.53	1,900.35		Total Pay Element	4,802.41	4,802.41	7,203.61	4,802.41	
		Oct	Nov	Dec	Jan																																																																																													
SG000310	Salary Amount	2,873.32	2,873.32	4,309.98	2,873.32																																																																																													
	Current Year Salary	2,873.32	2,873.32	4,309.98	2,873.32																																																																																													
	Cost of Living Adjustment	28.73	28.73	43.10	28.73																																																																																													
	Total Salary	2,902.05	2,902.05	4,353.08	2,902.05																																																																																													
HALF STEP (HS)	Salary Amount																																																																																																	
	PREMIUM PAY AFSOME F, G & H (3C)	140.00	140.00	210.00	140.00																																																																																													
	Flex Benefits	84.62	84.62	126.92	84.62																																																																																													
	Health Insurance Rate	1,153.85	1,153.85	1,730.77	1,153.85																																																																																													
	Life Insurance Rate	6.13	6.13	9.19	6.13																																																																																													
	Dental Plans	18.69	18.69	28.04	18.69																																																																																													
	FRS INVESTMENT PLAN - REGULAR (I3)	264.35	264.35	396.53	264.35																																																																																													
	Social Security Rate	188.61	188.61	282.91	188.61																																																																																													
	Medicare Rate	44.11	44.11	66.16	44.11																																																																																													
	Total Other Compensation	1,900.35	1,900.35	2,850.53	1,900.35																																																																																													
	Total Pay Element	4,802.41	4,802.41	7,203.61	4,802.41																																																																																													

<p>5</p>	<p>Select the "Manage Positions ->Single" breadcrumb to return to the Manage Single Position form.</p> 	<p>Users can also delete pay components (excluding premium pay components) assigned to vacancies. Premium pay is assigned to vacancies in Hyperion from a global table managed by OMB</p>
<p>6</p>	<p>Because you have made a change to the position--the "Exclude from HCM Update" column should now be marked as "Yes", indicating that this change is excluded from the nightly HCM refresh.</p>	

Lesson 15: Add/Delete Executive Benefits

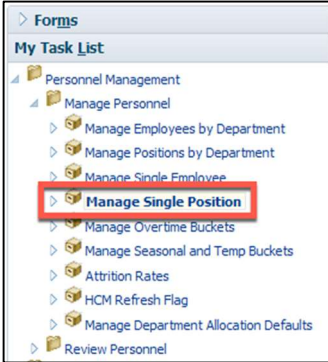
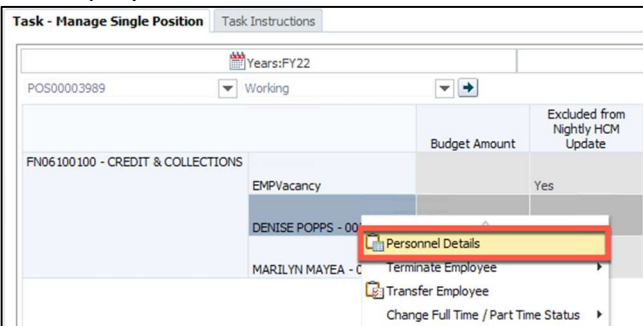
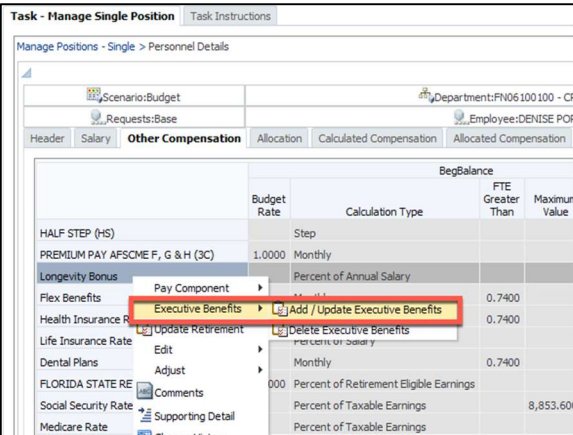
Lesson Overview

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 **Manage Single Position** task, but users can also make this change from any of the manage position or employee forms.

In this lesson you will learn:

- Navigate to the Personnel Details composite form
- Add and delete an executive benefit from an employee or position
- Validate the results of the calculation

Step	Action	Notes
1	<p>From the home screen, navigate to the Manage Single Position form by going to My Task List → Personnel Management → Manage Personnel → Manage Single Position.</p> 	
2	<p>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.</p>	<p>Users can also add pay components assigned to vacancies</p>
3	<p>Right click on the employee record and select “Personnel Details”.</p> 	
4	<p>Select the Other Compensation tab, then right click on the data form and select Executive Benefits → “Add / Update Executive Benefits”.</p> 	
5	<p>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.</p>	<p>There are two types of executive benefits: single rate and varying rate.</p>

->Enter Annual Rate (If a Variable Rate Element): enter a rate if applicable, i.e. If you've selected an executive benefit with a varying rate.

Select Launch.

Single rate executive benefits have a global rate associated with them. Varying rate executive benefits require you to enter an annual rate in the prompt.

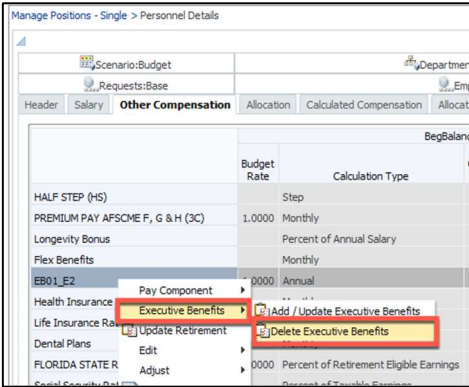
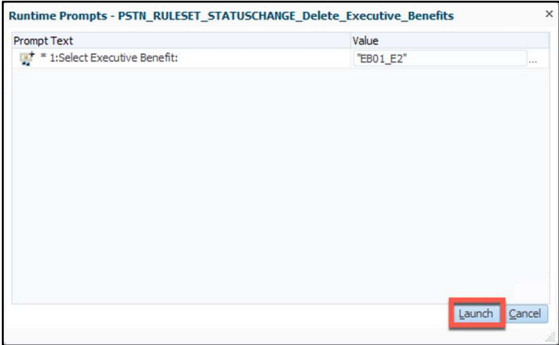
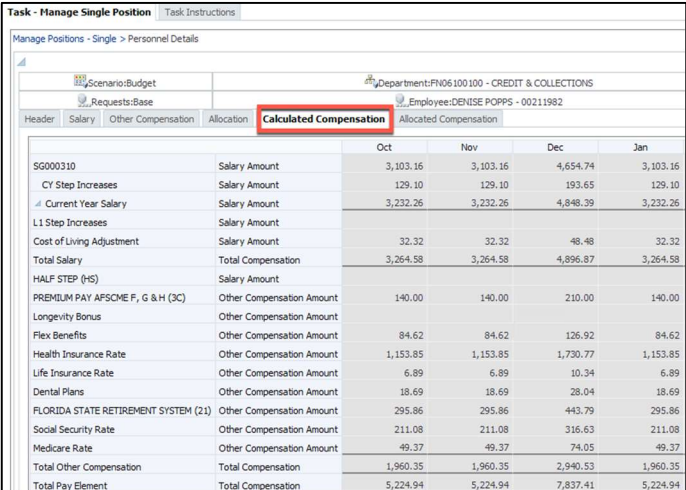
6 Confirm the executive benefit now appears on the form with its correct rate.

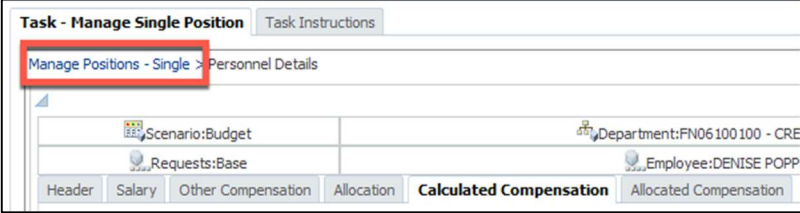
	Budget Rate	Calculation Type	FTE Greater Than	Maximum Value	Apply to Retirement
HALF STEP (HS)		Step			Yes
PREMIUM PAY AFSCME F, G & H (3C)	1.0000	Monthly			Yes
Longevity Bonus		Percent of Annual Salary			No
Flex Benefits		Monthly	0.7400		No
EB01_E2	1.0000	Annual			No
Health Insurance Rate		Monthly	0.7400		Yes

7 Select the Calculated Compensation tab and confirm the executive benefit has been calculated correctly.

		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	Salary Amount	3,232.26	3,232.26	4,848.39	3,232.26
L1 Step Increases	Salary Amount				
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	Other Compensation Amount				
Flex Benefits	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)	Other Compensation Amount	295.86	295.86	443.79	295.86
Social Security Rate	Other Compensation Amount	276.42	276.42	414.63	276.42
Medicare Rate	Other Compensation Amount	64.65	64.65	96.97	64.65
Total Other Compensation	Total Compensation	3,094.82	3,094.82	4,642.23	3,094.82
Total Pay Element	Total Compensation	6,359.40	6,359.40	9,539.10	6,359.40

The executive benefit you added should be applied to the entire budget year

Step	Action	Notes
1	<p>Select the Other Compensation tab, then right click on the pay component you just added and select Executive Benefits ->Delete Executive Benefits.</p> 	
2	<p>In the run time prompt, select / enter the following: ->Select Executive Benefit: Confirm the Executive Benefit to delete Select Launch.</p> 	
3	<p>Confirm the Executive Benefit no longer appears on the form.</p>	
4	<p>Select the Calculated Compensation tab and confirm the executive benefit is no longer being calculated.</p> 	<p>The executive benefit you delete should be deleted for the entire budget year</p>

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

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 **Manage Single Position** task, but users can also make this change from any of the manage employee forms as well.

In this lesson you will learn:

- Navigate to the Manage Single Position task
- Update the retirement assigned to an employee
- Validate the results of the calculation

5 Right click on the assigned retirement element and select "Update Retirement".

Header	Salary	Other Compensation	Allocation	Calculated Compensation	Allocated Compensation
			Budget Rate	Calculation Type	BegBalance FTE Greater Than Maximum Value
HALF STEP (HS)			Step		
PREMIUM PAY AFSCHE F, G & H (XC)			1.0000	Monthly	
Longevity Bonus				Percent of Annual Salary	
Flex Benefits				Monthly	0.7400
Health Insurance Rate				Monthly	0.7400
Life Insurance Rate				Percent of Salary	
Dental Plans				Monthly	0.7400
FLORIDA STATE		Pay Component	0.0000	Percent of Retirement Eligible Earnings	
Social Security Rate		Executive Benefits		Percent of Taxable Earnings	8,853.6000
Medicare Rate		Update Retirement		Percent of Taxable Earnings	

6 In the run time prompt, select / enter the following:
 ->Select Retirement Element: Use the member selector to select the retirement element to assign the employee in the budget year.
 Select Launch

Runtime Prompts - PSTN_RULESET_STATUSCHANGE_Update_Retirement

Prompt Text: 1:Select Retirement Element

Value: RET 11

Buttons: Launch, Cancel

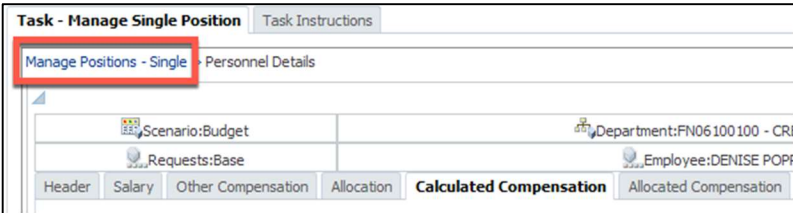
The update retirement rule will replace the retirement element assigned to the employee with the element you select in the run time prompt.

7 Confirm the "old" retirement no longer appears on the form and the element you selected in the run time prompt now appears.

Header	Salary	Other Compensation	Allocation	Calculated Compensation	Allocated Compensation
			Budget Rate	Calculation Type	BegBalance FTE Greater Than Maximum Value Apply to Retirement Apply to Taxes
HALF STEP (HS)			Step		Yes Yes
PREMIUM PAY AFSCHE F, G & H (XC)			1.0000	Monthly	Yes Yes
Longevity Bonus				Percent of Annual Salary	No Yes
Flex Benefits				Monthly	0.7400 No Yes
Health Insurance Rate				Monthly	0.7400
Life Insurance Rate				Percent of Salary	
Dental Plans				Monthly	0.7400
FLORIDA STATE RETIREMENT PLAN B (11)			1.0000	Percent of Retirement Eligible Earnings	
Social Security Rate				Percent of Taxable Earnings	8,853.6000
Medicare Rate				Percent of Taxable Earnings	

8 Select the Calculated Compensation tab and confirm only the retirement element you selected in the run time prompt appears on the form and that the element is calculated correctly.

Header	Salary	Other Compensation	Allocation	Calculated Compensation	Allocated Compensation			
				Oct	Nov	Dec	Jan	Feb
50000310	Salary Amount			1,103.16	1,103.16	4,654.74	1,103.16	1,103.16
CY Step Increases	Salary Amount			129.10	129.10	193.65	129.10	129.10
Current Year Salary	Salary Amount			3,232.26	3,232.26	4,848.39	3,232.26	3,232.26
L1 Step Increases	Salary Amount							
Cost of Living Adjustment	Salary Amount			32.32	32.32	48.48	32.32	32.32
Total Salary	Salary Compensation			3,264.58	3,264.58	4,896.87	3,264.58	3,264.58
HALF STEP (HS)	Salary Amount							
PREMIUM PAY AFSCHE F, G & H (XC)	Other Compensation Amount			140.00	140.00	210.00	140.00	140.00
Longevity Bonus	Other Compensation Amount							
Flex Benefits	Other Compensation Amount			84.62	84.62	126.92	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
Life Insurance Rate	Other Compensation Amount			6.89	6.89	10.34	6.89	6.89
Dental Plans	Other Compensation Amount			18.69	18.69	28.04	18.69	18.69
FLORIDA STATE RETIREMENT PLAN B (11)	Other Compensation Amount			309.82	309.82	464.73	309.82	309.82
Social Security Rate	Other Compensation Amount			211.08	211.08	316.63	211.08	211.08
Medicare Rate	Other Compensation Amount			49.37	49.37	74.05	49.37	49.37
Total Other Compensation	Total Compensation			1,674.31	1,674.31	2,561.47	1,674.31	1,674.31
Total Pay Element	Total Compensation			5,238.90	5,238.90	7,858.34	5,238.90	5,238.90

<p>9</p>	<p>Select the "Manage Positions ->Single" breadcrumb to return to the Manage Single Position form.</p> 	
<p>10</p>	<p>Because you have made a change to the position--the "Exclude from HCM Update" column should now be marked as "Yes", indicating that this change is excluded from the nightly HCM refresh.</p>	

Lesson 17: Update Allocation

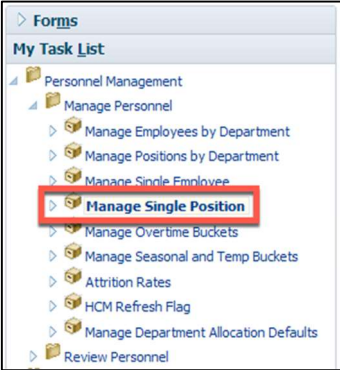
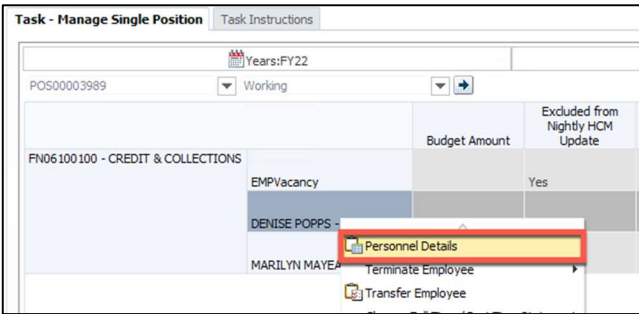
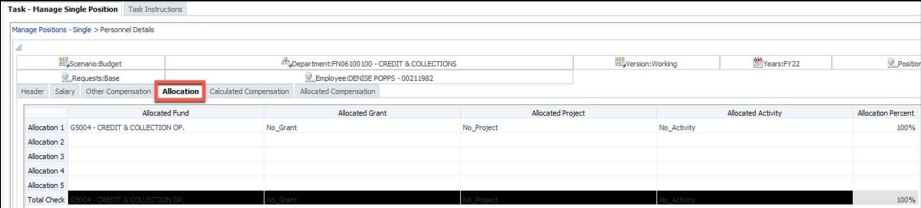
Lesson Overview

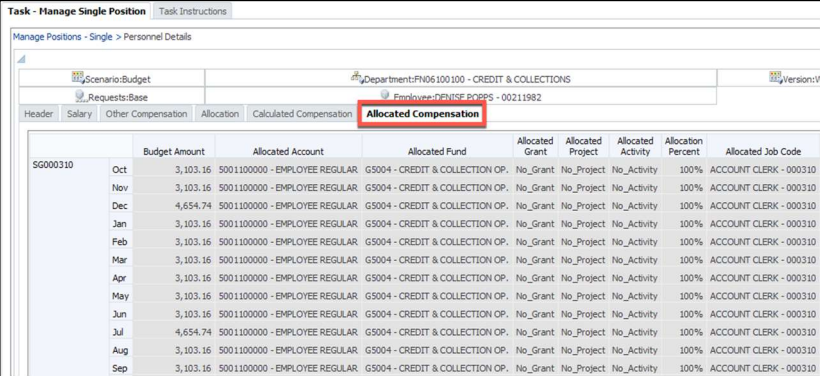
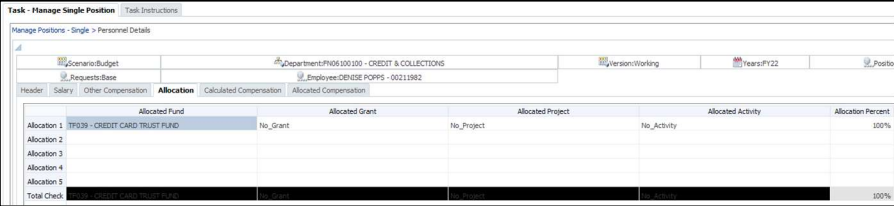
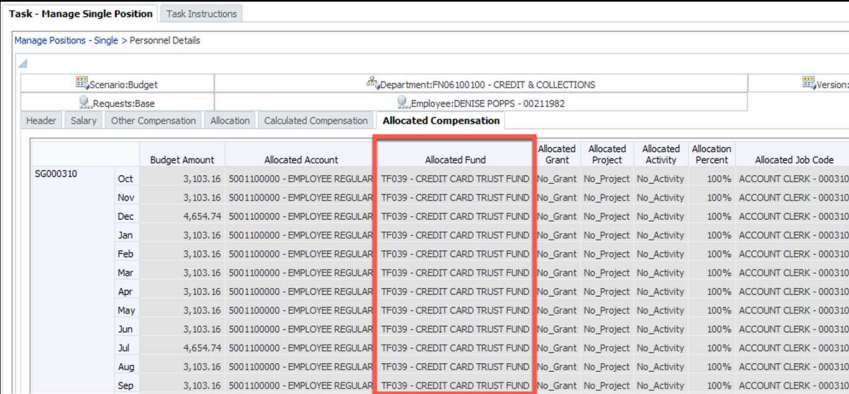
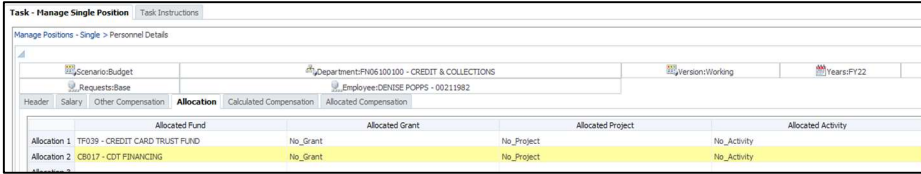
This lesson will guide users through the steps to update the chartfield allocation (fund, grant, project, and activity) assigned to a position or employee in the budget year. This status change is specific to an individual employee or vacancy record.

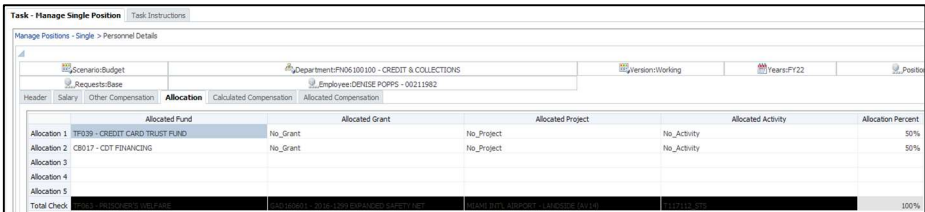
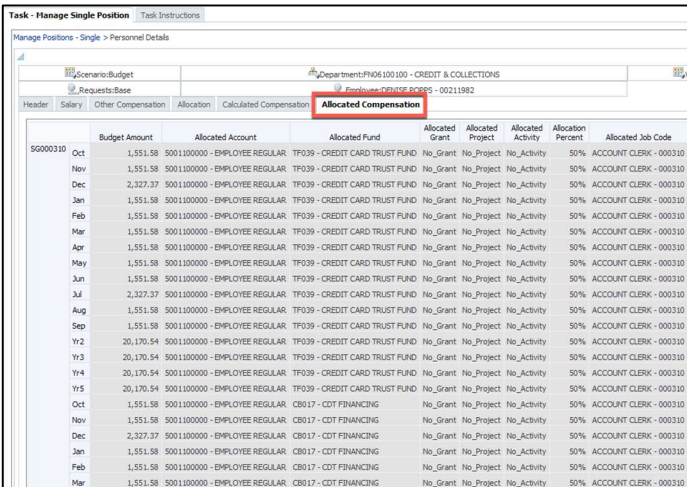
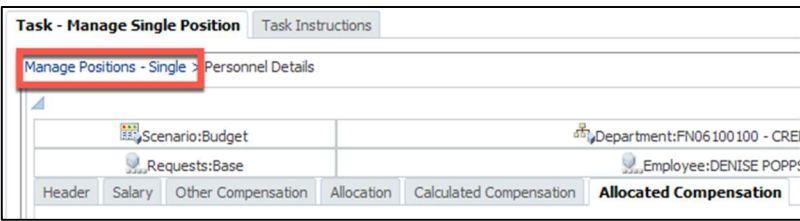
The steps listed below will navigate the user to the **Manage Single Position** task, but users can also make this change from any of the manage position or employee forms.

In this lesson you will learn:

- Navigate to the Manage Single Position task
- Update the chartfield allocation assigned to an employee or vacancy
- Validate the results of the calculation

Step	Action	Notes																																										
1	<p>From the home screen, navigate to the Manage Single Position form by going to My Task List → Personnel Management → Manage Personnel → Manage Single Position.</p> 																																											
2	<p>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.</p>																																											
3	<p>Right click on the employee record and select "Personnel Details".</p> 	<p>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)</p>																																										
4	<p>Select the Allocation tab and note the fund, grant, project and activity currently assigned to the employee.</p>  <table border="1" data-bbox="256 1545 1172 1650"> <thead> <tr> <th>Header</th> <th>Salary</th> <th>Other Compensation</th> <th>Allocation</th> <th>Calculated Compensation</th> <th>Allocated Compensation</th> </tr> </thead> <tbody> <tr> <td>Allocation 1</td> <td>65004 - CREDIT & COLLECTION OP.</td> <td>No_Grant</td> <td>No_Project</td> <td>No_Activity</td> <td>100%</td> </tr> <tr> <td>Allocation 2</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Allocation 3</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Allocation 4</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Allocation 5</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Total Check</td> <td></td> <td></td> <td></td> <td></td> <td>100%</td> </tr> </tbody> </table>	Header	Salary	Other Compensation	Allocation	Calculated Compensation	Allocated Compensation	Allocation 1	65004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100%	Allocation 2						Allocation 3						Allocation 4						Allocation 5						Total Check					100%	
Header	Salary	Other Compensation	Allocation	Calculated Compensation	Allocated Compensation																																							
Allocation 1	65004 - CREDIT & COLLECTION OP.	No_Grant	No_Project	No_Activity	100%																																							
Allocation 2																																												
Allocation 3																																												
Allocation 4																																												
Allocation 5																																												
Total Check					100%																																							

<p>5</p>	<p>Select the Allocated Compensation tab and note the fund, grant, project, and activity calculated allocations. The segments should match those on the Allocation tab.</p> 	
<p>6</p>	<p>Select the Allocation tab and using the cell drop downs, change either the fund, grant, project, or activity on the "Allocation 1" row. Click the "Save" icon.</p> 	<p>All four segments and an allocation percent must be entered on the row. If you leave one segment blank, the Allocation Percent cell will be highlighted red, indicating you need to fix the allocation.</p>
<p>7</p>	<p>Select the Allocated Compensation tab and confirm the allocated compensation is now allocated to the segment you changed on the Allocation form.</p> 	
<p>8</p>	<p>Select the Allocation tab and using the cell drop downs, select a new fund, grant, project and activity on the "Allocation 2" row.</p> 	

<p>9</p>	<p>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 "Save" icon.</p> 	<p>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.</p> <p>Allocation percent's can be entered numerically (1 for 100%) or with a % sign (100% for 100%)</p>
<p>10</p>	<p>Select the Allocated Compensation tab and confirm the allocated compensation is now split based on the split funding you set on the Allocation form.</p> 	
<p>11</p>	<p>Select the "Manage Positions ->Single" breadcrumb to return to the Manage Single Position form.</p> 	
<p>12</p>	<p>Because you have made a change to the position--the "Exclude from HCM Update" column should now be marked as "Yes", indicating that this change is excluded from the nightly HCM refresh.</p>	

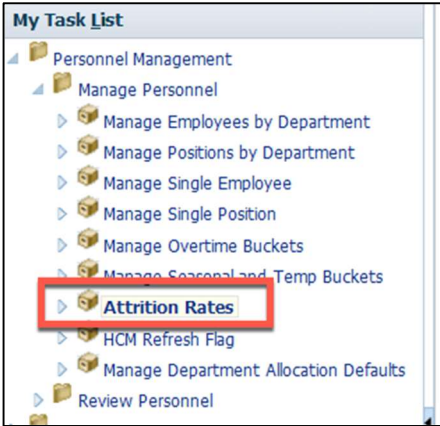
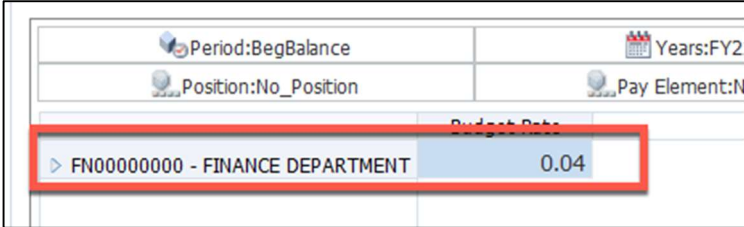
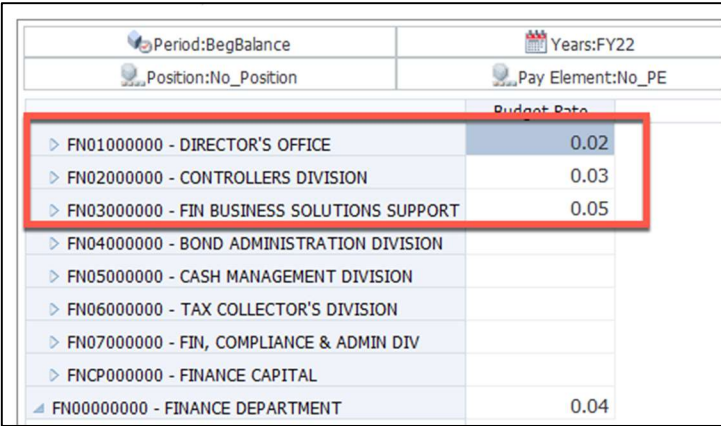
Lesson 18: Set Attrition Rates

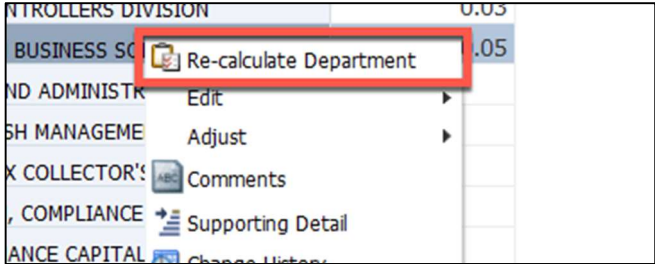
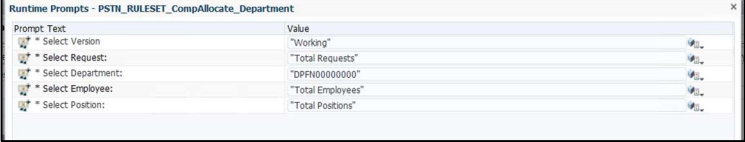

Lesson Overview

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:

- Navigate to the Attrition Rates task
- Enter attrition rates at any level of your department structure
- Validate the results of the calculation on the Attrition Budget Impact Review task

Step	Action	Notes
1	<p>From the home screen, navigate to the Attrition Rates form by going to My Task List → Personnel Management → Manage Personnel → Attrition Rates.</p> 	
2	<p>Enter an attrition rate at the department level. Click Save.</p> 	<p>If the only rate you enter is at the summary department level, that rate will apply to every position and employee in the department</p> <p>Attrition rates can be entered numerically (0.04 for 4%) or with a % sign (4% for 4%)</p>
3	<p>Expand the department on the form and enter a different attrition rate for a division within the department with positions and employees. Click “Save”.</p> 	<p>The rate entered at the lower level will override the attrition rate entered at the summary department</p>

<p>4</p>	<p>Right click on the form and select "Re-calculate Department" from the right click menu.</p> 	
<p>5</p>	<p>In the run time prompt, confirm the following:</p> <p>Select Version: Working Select Request: Total Requests Select Department: Your department user variable Select Employees: Total Employees Select Position: Total Positions</p> <p>Select Launch.</p> 	<p>Running this rule will recalculate attrition on all positions and employees in the department</p>
<p>6</p>	<p>***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</p>	<p>Data maps run every three hours at the top of the hour, starting at 6am</p>
<p>6</p>	<p>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.</p>	<p>This form pulls data from PSTN_RPT, therefore the data maps need to run before updated attrition amounts appear on this form</p>
<p>7</p>	<p>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.</p> 	<p>The attrition amount should be the percent you applied at the summary department level</p>

8 Confirm the calculated attrition amounts reflect the rate entered on the attrition form.

	Personnel Excluding Attrition	Attrition Impact	Budget Amount
5001100000 - EMPLOYEE REGULAR	14,001,952	-560,078	13,441,874
5001130000 - VACATION RELF & SEASONAL HELP	115,920		115,920
5001600000 - EMPLOYEE OVERTIME OT	9,000		9,000
5001250000 - LONGEVITY PAYMENTS	180,547		180,547
5001220000 - FLEX DOLLARS	240,900	-9,636	231,264
5011100000 - GROUP HEALTH INSURANCE	3,285,000	-131,400	3,153,600
5011100000 - GROUP LIFE INSURANCE	28,125	-1,125	27,000
5011140000 - DENTAL PLANS	53,217	-2,129	51,088
5010110000 - RETIREMENT	1,298,378	-51,935	1,246,443
5010100000 - SOCIAL SECURITY	882,727	-35,309	847,418
5011130000 - MICA MEDICARE HOSPITAL BIS	207,458	-8,298	199,159
Total PSTN Sourced Personnel Accounts	20,303,224	-799,918	19,503,314

Attrition is NOT calculated for the following accounts:

- Overtime
- Temp / Seasonal
- Longevity Bonus
- Executive Benefits
- Termination Payouts

9 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 adjust at the division level**. Select the grant, project, and activity if applicable, then click the “Go” arrow to save your selection.

	Personnel Excluding Attrition	Attrition Impact	Budget Amount
5001100000 - EMPLOYEE REGULAR	1,077,459	-21,549	1,055,910
5001600000 - EMPLOYEE OVERTIME OT	9,000		9,000
5001250000 - LONGEVITY PAYMENTS	11,427		11,427
5001220000 - FLEX DOLLARS	11,000	-220	10,780
5011100000 - GROUP HEALTH INSURANCE	150,000	-3,000	147,000
5011100000 - GROUP LIFE INSURANCE	2,236	-45	2,191
5011140000 - DENTAL PLANS	2,430	-49	2,381
5010110000 - RETIREMENT	146,969	-2,939	144,030
5010100000 - SOCIAL SECURITY	59,852	-1,197	58,655
5011130000 - MICA MEDICARE HOSPITAL BIS	15,919	-318	15,601
Total PSTN Sourced Personnel Accounts	1,486,293	-29,317	1,456,976

The attrition amount should be the override percent you applied at the division level

10 Confirm the calculated attrition amounts reflect the rate you entered on the attrition form.

	Personnel Excluding Attrition	Attrition Impact	Budget Amount
5001100000 - EMPLOYEE REGULAR	1,077,459	-21,549	1,055,910
5001600000 - EMPLOYEE OVERTIME OT	9,000		9,000
5001250000 - LONGEVITY PAYMENTS	11,427		11,427
5001220000 - FLEX DOLLARS	11,000	-220	10,780
5011100000 - GROUP HEALTH INSURANCE	150,000	-3,000	147,000
5011100000 - GROUP LIFE INSURANCE	2,236	-45	2,191
5011140000 - DENTAL PLANS	2,430	-49	2,381
5010110000 - RETIREMENT	146,969	-2,939	144,030
5010100000 - SOCIAL SECURITY	59,852	-1,197	58,655
5011130000 - MICA MEDICARE HOSPITAL BIS	15,919	-318	15,601
Total PSTN Sourced Personnel Accounts	1,486,293	-29,317	1,456,976


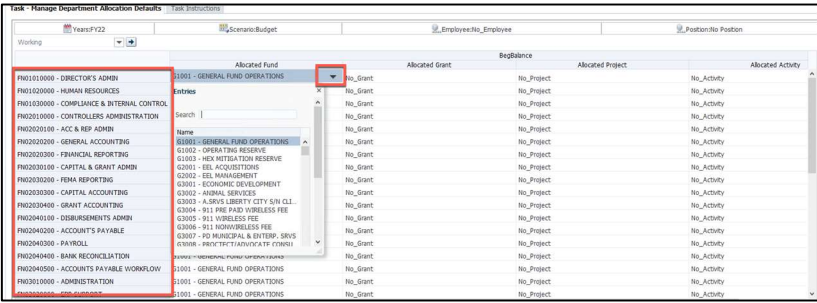
Lesson 19: Manage Department Allocation Defaults

Lesson Overview

This lesson will guide users through the steps to manage their fund, grant, project and activity defaults for each level 0 department. Funding defaults are assigned to new 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	<p>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.</p> 	<p>This form displays the default funding segment for every level 0 department.</p>
2	<p>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”.</p> 	<p>This form should be reviewed early in the budget process so that any new 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 manually adjusted.</p>
3	<p>Review the form and verify that the Department Chartfield Defaults table is set up correctly.</p>	


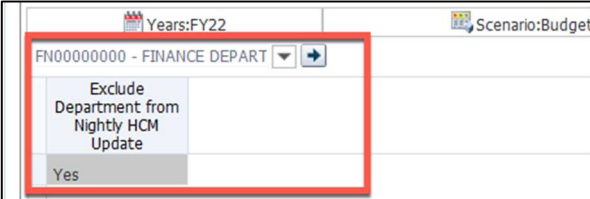
Lesson 20: View HCM Refresh Flag

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:

- Navigate to the HCM Refresh Flag task
- Review the read-only form

Step	Action	Notes
1	<p>From the home screen, navigate to the HCM Refresh Flag form by going to My Task List → Personnel Management → Manage Personnel → HCM Refresh Flag.</p> 	
2	<p>Review the read-only form.</p> 	<p>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.</p>

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.


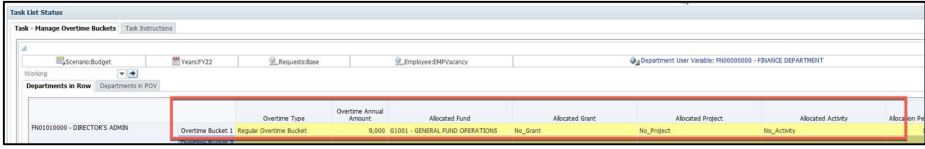
Lesson 1: Manage Overtime Buckets

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:

- Navigate to the Manage Overtime Buckets task
- Add, adjust, and delete an overtime bucket
- Validate the results of the calculation

Step	Action	Notes
1	<p>From the home screen, navigate to the Manage Overtime Buckets form by going to My Task List → Personnel Management → Manage Personnel → Manage Overtime Buckets.</p> 	
2	<p>To create an overtime bucket, select / enter the following in one of the “Overtime Bucket 1” rows next to a level 0 department:</p> <ul style="list-style-type: none"> ->Overtime Type: Regular or Special Risk ->Overtime Annual Amount: Annual amount for the bucket (excluding retirement and taxes) ->Allocated Fund ->Allocated Grant ->Allocated Project ->Allocated Activity ->Allocation Percent: Enter in 1 or 100% (1=100%) <p>Click “Save”.</p> 	<p>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.</p> <p>The overtime bucket type selection drives the retirement element assignment</p>
3	<p>Scroll to the far right of the form and confirm the following in the last 3 gray columns:</p> <ul style="list-style-type: none"> ->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 	<p>The Salary Amount should match the Overtime Annual Amount</p> <p>The Other Compensation Amount includes both retirement and taxes</p>

<p>4</p>	<p>Right click on the overtime bucket you just created and select "Overtime Details".</p>	
<p>5</p>	<p>Select the Salary tab and confirm the following: ->The starting amount you entered in the Overtime Annual Amount column in the previous steps appears in the Overtime Annual Amount row / BegBalance column</p>	<p>You can modify the amount from this tab</p>
<p>6</p>	<p>Select the Other Compensation tab and confirm the following: ->The correct retirement element is assigned to the overtime bucket (either regular or special risk) ->FICA and MICA are assigned to the bucket</p>	<p>Retirement should be regular or special risk, depending on the overtime type you selected</p>
<p>7</p>	<p>Select the Allocation tab and confirm the following: ->The department default fund, grant, project and activity is loaded to Allocation 1</p>	
<p>8</p>	<p>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</p>	

<p>9</p>	<p>Select the Allocated Compensation tab and confirm the following: ->Overtime Bucket Salary is mapped to the Overtime account ->No FTE is allocated (would appear at the very bottom of the form)</p>	
<p>10</p>	<p>Go back to the Salary tab and adjust the Overtime Annual Amount in the BegBalance column. Click "Save".</p>	
<p>11</p>	<p>Go back to the Calculated Compensation tab and confirm the following: ->The calculated amounts reflect the new starting annual amount</p>	
<p>12</p>	<p>Select the "Manage Overtime Buckets" breadcrumb to return to the previous form.</p>	
<p>13</p>	<p>If you are working with a large department and don't want to scroll through the form to find your level 0 department OR a level 0 department requires more than two buckets, you can click on the second horizontal tab called "Departments in POV". Instead of listing all of the level 0 departments in the rows, the "Departments in POV" form allows you to select your level 0 department in the POV. This form gives users the option to create up to 20 overtime buckets per department ID.</p>	

Overtime Bucket	Overtime Type	Overtime Annual Amount	Allocated Fund	Allocated Grant	Allocated Project
Overtime Bucket 1	Regular Overtime Bucket	1,000,009	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project
Overtime Bucket 2					
Overtime Bucket 3					
Overtime Bucket 4					
Overtime Bucket 5					
Overtime Bucket 6					
Overtime Bucket 7					
Overtime Bucket 8					
Overtime Bucket 9					
Overtime Bucket 10					
Overtime Bucket 11					
Overtime Bucket 12					
Overtime Bucket 13					
Overtime Bucket 14					
Overtime Bucket 15					
Overtime Bucket 16					

14

The third tab, Review Buckets, will show all overtime buckets in the department. The form is set up to suppress blank rows so users will only see existing overtime buckets with data.

Overtime Type	Overtime Annual Amount	Allocated Fund	Allocated Grant	Allocated Project
Regular Overtime Bucket	1,000,009	G5004 - CREDIT & COLLECTION OP.	No_Grant	No_Project


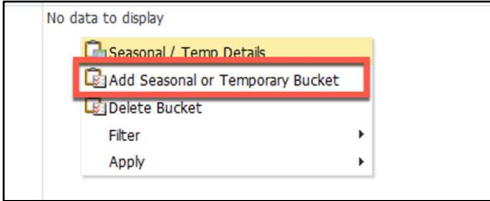
Lesson 2: Manage Seasonal and Temp Buckets

Lesson Overview

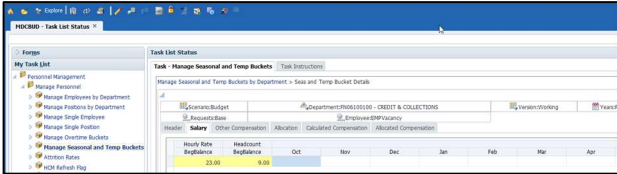
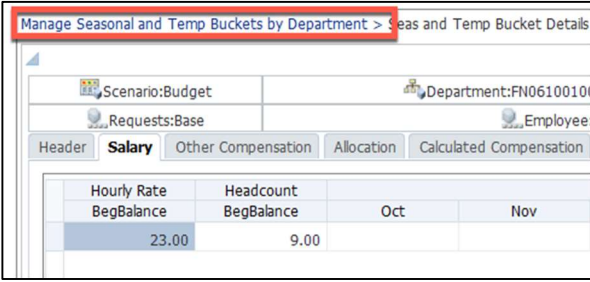
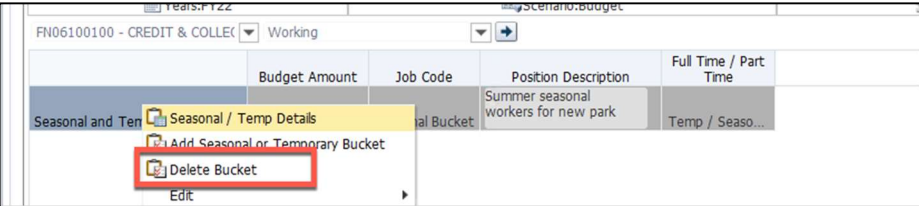

This lesson will guide users through the steps to create and manage seasonal and temp buckets in the budget year. Temp and Seasonal buckets are created in the PSTN cube and the calculated amounts are mapped to FINSTMT as part of the scheduled data map.

In this lesson you will learn:

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

Step	Action	Notes
1	<p>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.</p> 	
2	<p>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.</p>	
3	<p>Right click on the form and select "Add Seasonal or Temporary Bucket".</p> 	
4	<p>In the run time prompt, select / enter the following:</p> <ul style="list-style-type: none"> ->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). <p>Select Launch.</p>	<p>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.</p> <p>Each month is calculated as $\text{Hours / Month} * \text{Headcount} * \text{Hourly Rate}$</p>

5	<p>Right click on the bucket you just added and select "Seasonal / Temp Details".</p>	
6	<p>Select the Salary tab and confirm the following:</p> <ul style="list-style-type: none"> ->The Hourly Rate in the BegBalance column is the rate you entered in the add bucket rule ->The Headcount number in the BegBalance column is the monthly headcount you entered in the add bucket rule ->The Hours / Month in each month is what you entered in the run time prompt 	
7	<p>Select the Other Compensation tab and confirm the following:</p> <ul style="list-style-type: none"> ->FICA and MICA are assigned to the bucket 	<p>Taxes are applied to each temp / seasonal bucket</p>
8	<p>Select the Allocation tab and confirm the following:</p> <ul style="list-style-type: none"> ->The department default fund, grant, project and activity is loaded to Allocation 1 	<p>The allocation is defaulted from the Department Allocation Defaults form</p>
9	<p>Select the Calculated Compensation tab and confirm the following:</p> <ul style="list-style-type: none"> ->The calculated amounts are correct. Only the months that have "Hours Per Head" will show calculated amounts. 	
10	<p>Select the Allocated Compensation tab and confirm the following:</p> <ul style="list-style-type: none"> ->Bucket Salary is mapped to the Temp and Seasonal account ->FTE is allocated to the temp and seasonal FTE account 	<p>FTE is calculated based on the headcount and hours entered into each month</p>
11	<p>Go back to the Salary tab and adjust the Hourly Rate and Headcount numbers in the BegBalance column. Click the "Save" icon.</p>	

		
<p>12</p>	<p>Go back to the Calculated Compensation tab and confirm the following: ->The calculated amounts reflect the new hourly rate and headcount numbers</p>	
<p>13</p>	<p>Select the "Manage Seasonal and Temp Buckets by Department" breadcrumb to return to the previous form.</p> 	
<p>14</p>	<p>Right click on the bucket and select "Delete Bucket".</p> 	
<p>15</p>	<p>In the run time prompt, select / enter the following: ->Confirm the bucket member to delete Select Launch.</p> 	<p>Deleting a temp / seasonal bucket works the same way as deleting a new position</p>


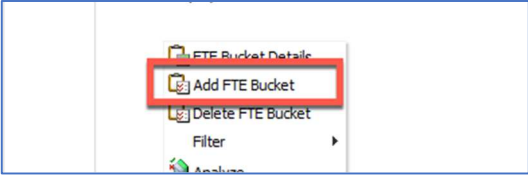
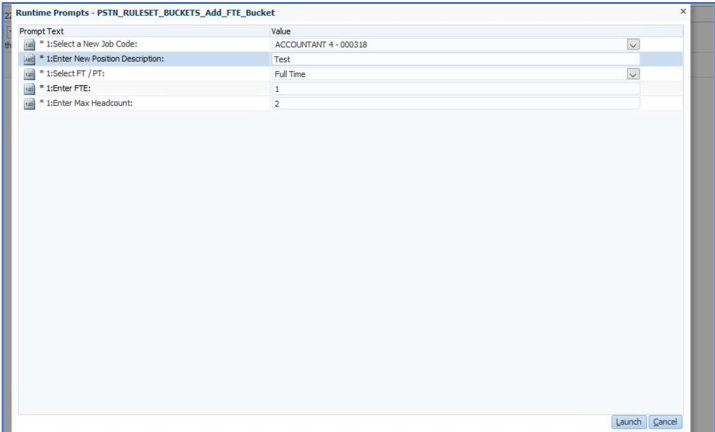
Lesson 3: Manage FTE Buckets

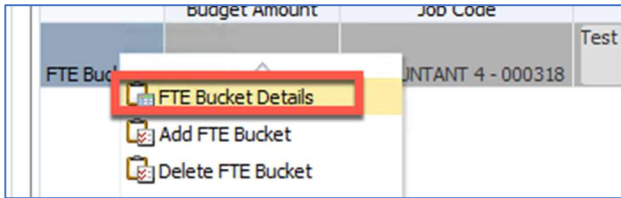
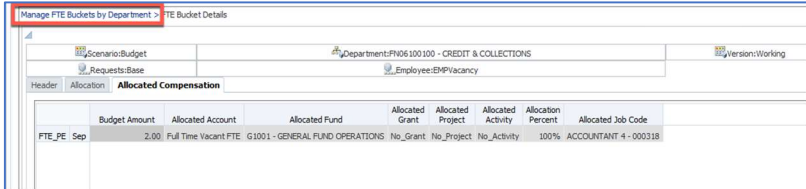
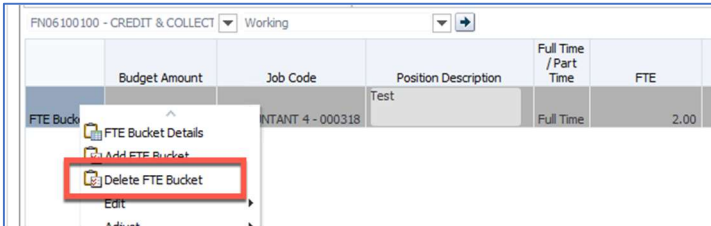
Lesson Overview

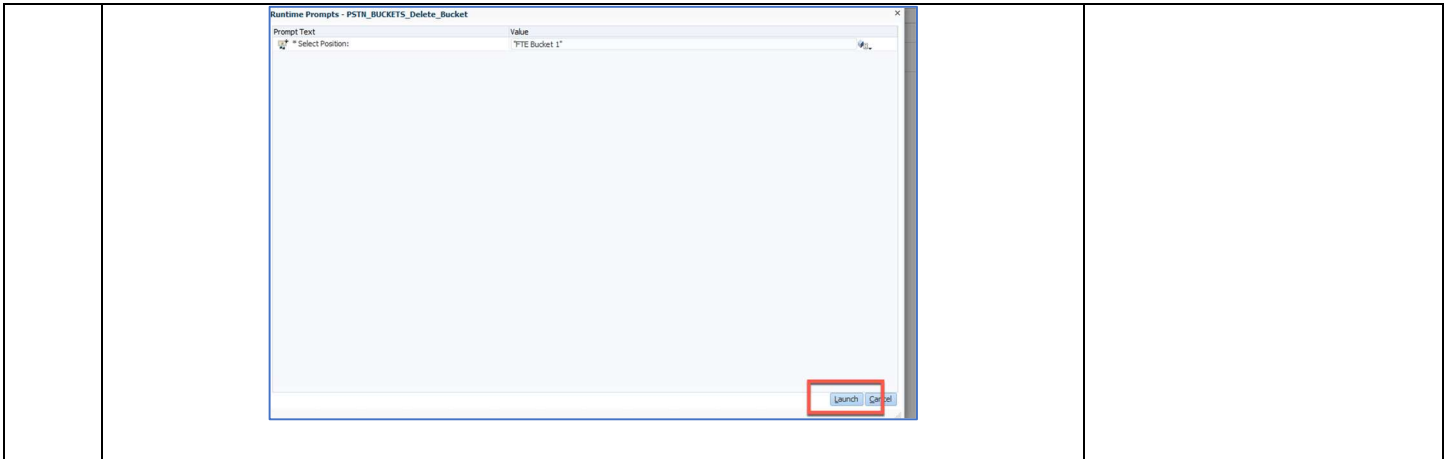
This lesson will guide users through the steps to create and manage FTE buckets in the budget year. FTE buckets are created in the PSTN cube and the calculated FTE amounts are mapped to FINSTMT as part of the scheduled data map.

In this lesson you will learn:

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

Step	Action	Notes
1	<p>From the home screen, navigate to the Manage FTE Buckets form by going to My Task List ->Personnel Management ->Manage Personnel ->Manage FTE Buckets.</p> 	
2	<p>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.</p>	
3	<p>Right click on the form and select "Add FTE Bucket".</p> 	
4	<p>In the run time prompt, select / enter the following:</p> <ul style="list-style-type: none"> ->Select Job Code: Select a job code from the dop down list ->Enter New Position Description: Text description for the bucket ->Select FT / PT: Select either Full Time or Part Time ->Enter FTE: Enter the standard FTE for each headcount in the bucket ->Enter Max Headcount: Enter the headcount number for the bucket <p>Select Launch.</p> 	<ul style="list-style-type: none"> - The FTE bucket is calculated by multiplying the FTE by the max headcount. - The FT/PT selection drives the FTE stat account that the FTE amounts are allocated to

<p>5</p>	<p>Right click on the bucket you just added and select "FTE Bucket Details".</p>  <p>The screenshot shows a table with columns 'Budget Amount' and 'Job Code'. A row is highlighted with 'FTE Buck' and 'ACCOUNTANT 4 - 000318'. A context menu is open over the row, with 'FTE Bucket Details' highlighted in red. Other options include 'Add FTE Bucket' and 'Delete FTE Bucket'.</p>	
<p>6</p>	<p>Select the Allocation tab and confirm the following: ->The department default fund, grant, project and activity is loaded to Allocation 1</p>	<p>The allocation is defaulted from the Department Allocation Defaults form</p>
<p>7</p>	<p>Select the Allocated Compensation tab and confirm the following: ->FTE is allocated to one of the vacancy FTE accounts</p>	<p>FTE buckets are always 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</p>
<p>8</p>	<p>Select the "Manage FTE Buckets by Department" breadcrumb to return to the previous form.</p>  <p>The screenshot shows a breadcrumb trail: 'Manage FTE Buckets by Department > FTE Bucket Details'. The 'Manage FTE Buckets by Department' link is highlighted in red. Below the breadcrumb is a table with columns: Budget Amount, Allocated Account, Allocated Fund, Allocated Grant, Allocated Project, Allocated Activity, Allocation Percent, and Allocated Job Code. A row is visible with values: FTE_PE Sep, 2.00, Full Time Vacant FTE, G1001 - GENERAL FUND OPERATIONS, No_Grant, No_Project, No_Activity, 100%, ACCOUNTANT 4 - 000318.</p>	
<p>9</p>	<p>Right click on the bucket and select "Delete Bucket".</p>  <p>The screenshot shows a table with columns: Budget Amount, Job Code, Position Description, Full Time / Part Time, and FTE. A row is highlighted with 'FTE Buck', 'ACCOUNTANT 4 - 000318', 'Test', 'Full Time', and '2.00'. A context menu is open over the row, with 'Delete FTE Bucket' highlighted in red. Other options include 'FTE Bucket Details', 'Add FTE Bucket', 'Edit', and 'Adjust'.</p>	
<p>10</p>	<p>In the run time prompt, select / enter the following: ->Confirm the bucket member to delete Select Launch.</p>	<p>Deleting a FTE bucket works the same way as deleting a new position</p>



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
- Lesson 2: Attrition Budget Impact Review
- 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

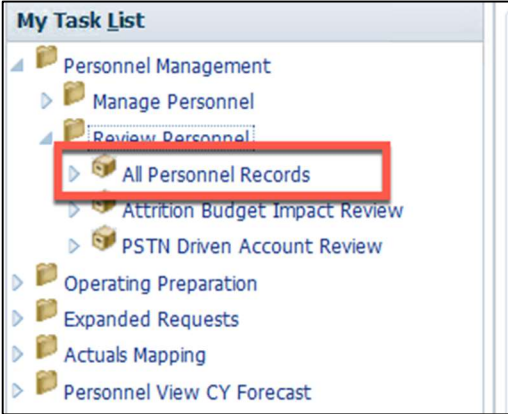
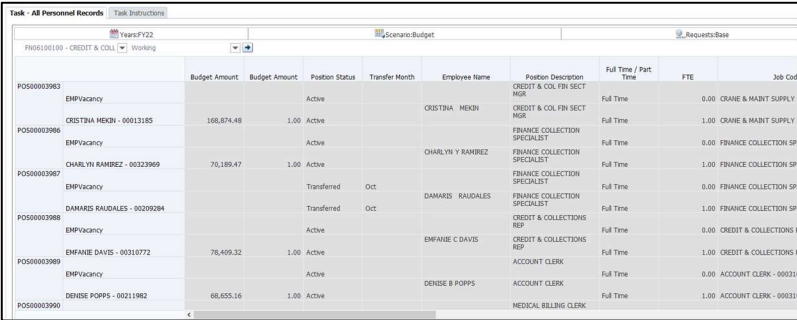
Lesson 1: Review All Personnel Records

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:

- Navigate to the All Personnel Records task
- Review the read-only form

Step	Action	Notes
1	<p>From the home screen, navigate to the All Personnel Records form by going to My Task List → Personnel Management → Review Personnel → All Personnel Records.</p> 	
2	<p>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.</p>	
3	<p>Review all positions and employees on the form, including the totals at the bottom of the form.</p> 	<p>This form acts as a position, employee and bucket review 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.</p>

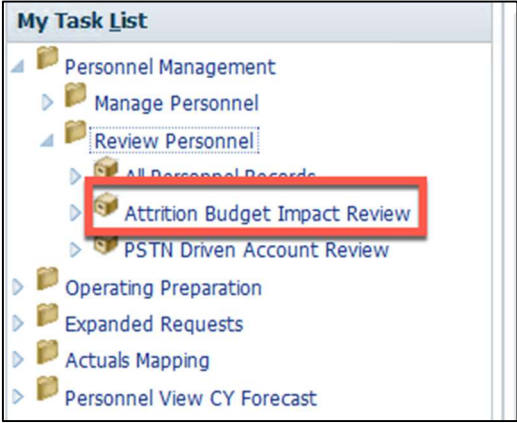
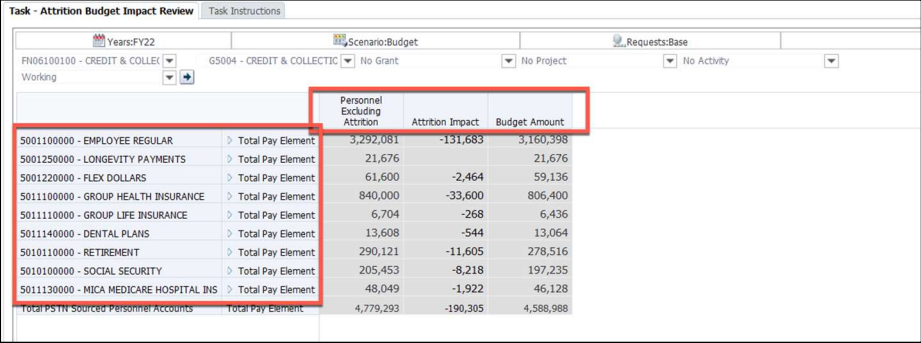
Lesson 2: Attrition Budget Impact Review

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:

- Navigate to the Attrition Budget Impact Review task
- Review the read-only form

Step	Action	Notes
1	<p>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.</p> 	
2	<p>Click on the drop-down arrow next to the Department, Fund, Grant, Project, and Activity dimension in the point of view (POV) and select a chartfield combination with allocated personnel data. Click the "Go" arrow to save your selection.</p>	
3	<p>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 reports</p> <p>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.)</p> 	<p>This form pulls from the PSTN_RPT database. The data on this form will be updated after each scheduled data map.</p> <p>The Personnel Excluding Attrition column is what would tie to the Budget Amount column on manage position and employee forms.</p> <p>The Budget Amount column is what would tie to the budget amounts in FINSTMT</p>

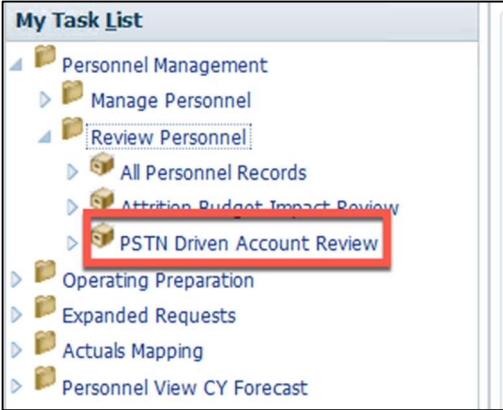
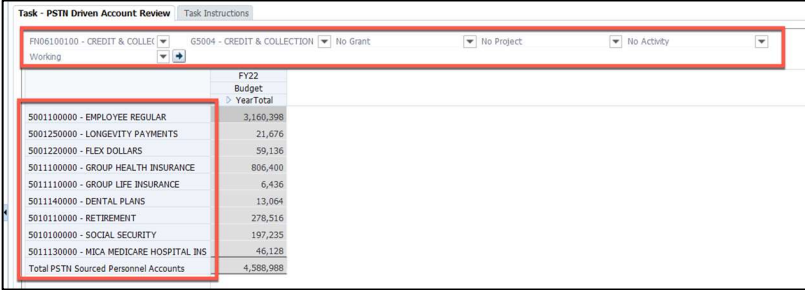
Lesson 3: PSTN Driven Account Review

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:

- Navigate to the PSTN Driven Account Review task
- Review the read-only form

Step	Action	Notes
1	<p>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.</p> 	
2	<p>Click on the drop-down arrow next to the Department, Fund, Grant, Project, and Activity dimension in the point of view (POV) and select a chartfield combination with allocated personnel data. Click the "Go" arrow to save your selection.</p>	
3	<p>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 net of attrition</p> <p>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</p> 	<p>The data on this form will be updated after each scheduled data map.</p> <p>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.</p>

Module 7: Course Summary

Objectives Achieved



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

- 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

Overview

This module includes the following lessons:

- 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

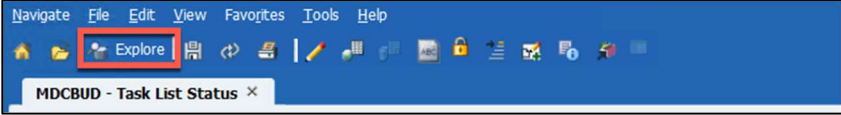
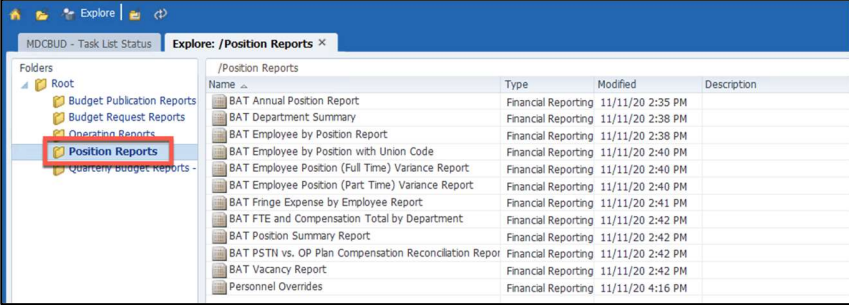
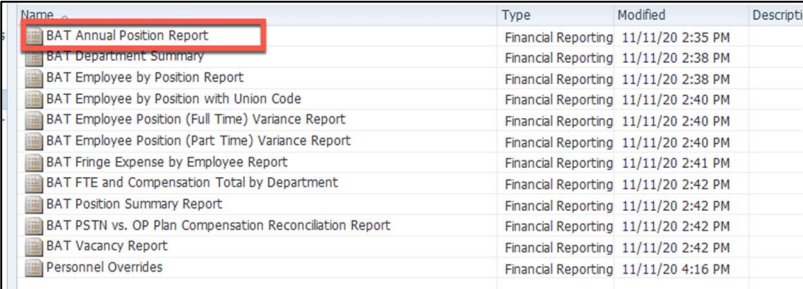
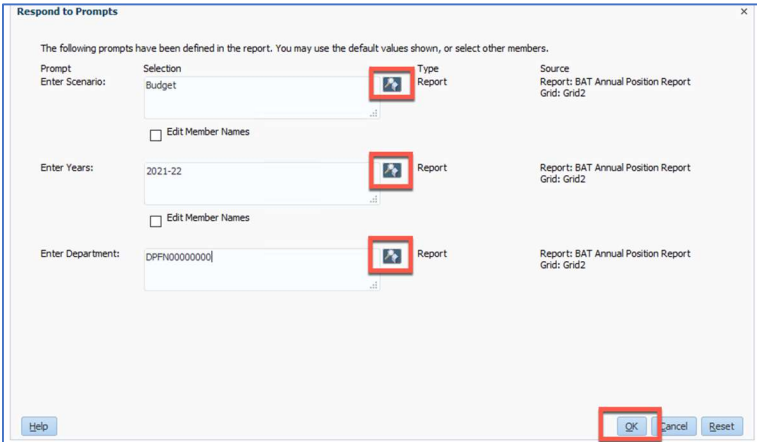
Lesson 1: BAT Annual Position Report

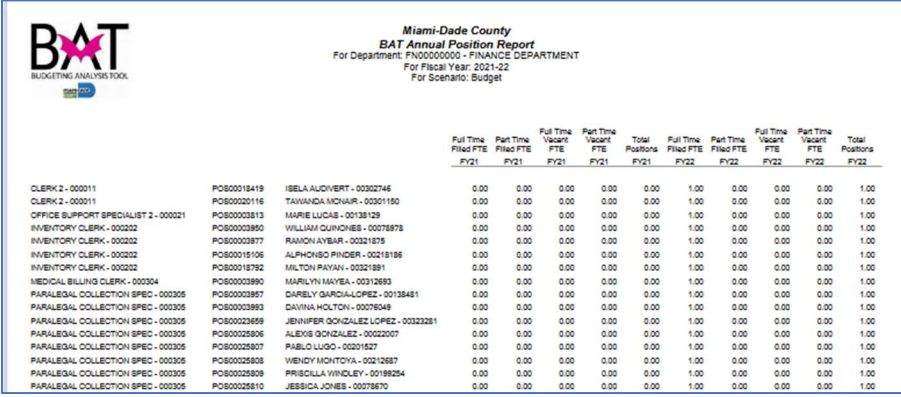
Lesson Overview

This lesson will guide users through the steps to run the BAT Annual Position Report.

In this lesson you will learn:

- Navigate to the Position Reports folder
- Run the BAT Annual Position Report

Step	Action	Notes
1	<p>From the home screen, select the "Explore" button.</p> 	
2	<p>Click on the "Position Reports" folder to open it.</p> 	
3	<p>Run the BAT Annual Position Report in PDF by double clicking on the report name.</p> 	
4	<p>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".</p> 	<p>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.</p>

<p>5</p>	<p>Verify that the report runs.</p> 	<p>Rows: ->JobCode dimension (Level 0 descendants of Total Job Codes) ->Position dimension (Level 0 descendants of Total Positions) ->Employee dimension (Level 0 descendants of Total Employees)</p> <p>Columns: A: CY Budget Full Time Filled FTE (Account) B: CY Budget Part Time Filled FTE (Account) C: CY Budget Full Time Vacant (Account) D: Part Time Vacant (Account) E: CY Budget Total Positions (FTE) (Account) F: Full Time Filled FTE (Account) for Year / Scenario prompt selections G: Part Time Filled FTE (Account) for Year / Scenario prompt selections H: Full Time Vacant (Account) for Year / Scenario prompt selections I: Part Time Vacant (Account) for Year / Scenario prompt selections J: Total Positions (FTE) (Account) for Year / Scenario prompt selections</p>

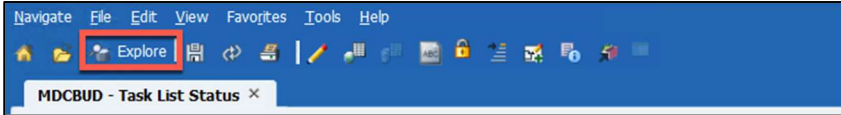
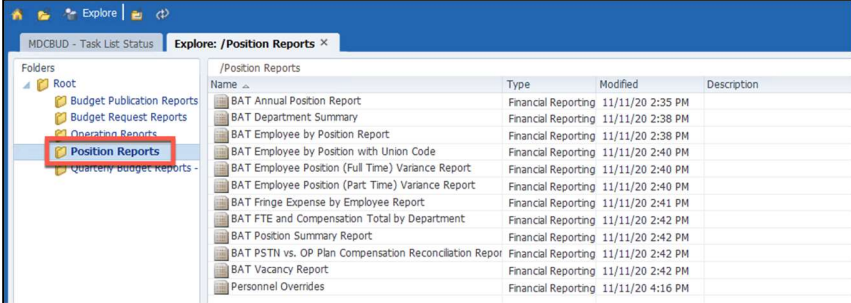
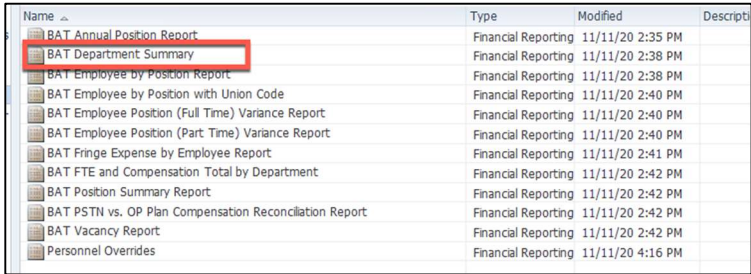
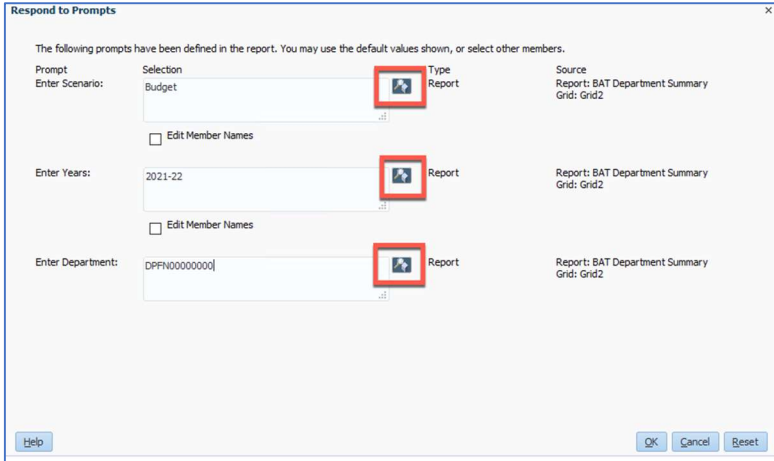
Lesson 2: BAT Department Summary

Lesson Overview

This lesson will guide users through the steps to run the BAT Department Summary report.

In this lesson you will learn:

- Navigate to the Position Reports folder
- Run the BAT Department Summary report

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

<p>5</p>	<p>Verify that the report runs.</p> <div data-bbox="224 504 1136 871" style="border: 1px solid black; padding: 10px;"> <table border="1"> <thead> <tr> <th></th> <th>Total Employees FY22</th> <th>Vacancy FY22</th> <th>Existing Employees FY22</th> </tr> </thead> <tbody> <tr> <td>5001100000 - EMPLOYEE REGULAR</td> <td>\$26,264,610</td> <td>\$2,092,001</td> <td>\$24,172,609</td> </tr> <tr> <td>5001120000 - PART TIME EMPLOYEE</td> <td>\$100,297</td> <td>\$0</td> <td>\$100,297</td> </tr> <tr> <td>5001220000 - FLEX DOLLARS</td> <td>\$427,900</td> <td>\$38,500</td> <td>\$389,400</td> </tr> <tr> <td>5001250000 - LONGEVITY PAYMENTS</td> <td>\$291,870</td> <td>\$0</td> <td>\$291,870</td> </tr> <tr> <td>5010100000 - SOCIAL SECURITY</td> <td>\$1,620,689</td> <td>\$129,704</td> <td>\$1,490,985</td> </tr> </tbody> </table> </div>		Total Employees FY22	Vacancy FY22	Existing Employees FY22	5001100000 - EMPLOYEE REGULAR	\$26,264,610	\$2,092,001	\$24,172,609	5001120000 - PART TIME EMPLOYEE	\$100,297	\$0	\$100,297	5001220000 - FLEX DOLLARS	\$427,900	\$38,500	\$389,400	5001250000 - LONGEVITY PAYMENTS	\$291,870	\$0	\$291,870	5010100000 - SOCIAL SECURITY	\$1,620,689	\$129,704	\$1,490,985	<p>Rows: ->Account and Pay Element dimensions (several salary and benefit accounts under Total Pay Element such as Employee Regular, Part Time Employee, Flex Dollars, Longevity Payments, etc.) ->FT and PT Filled and Vacant FTE information</p> <p>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</p>
	Total Employees FY22	Vacancy FY22	Existing Employees FY22																							
5001100000 - EMPLOYEE REGULAR	\$26,264,610	\$2,092,001	\$24,172,609																							
5001120000 - PART TIME EMPLOYEE	\$100,297	\$0	\$100,297																							
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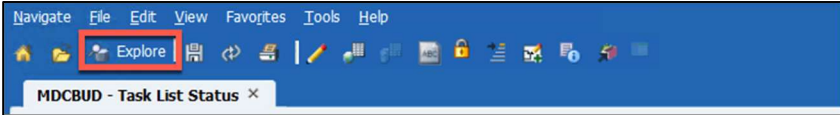
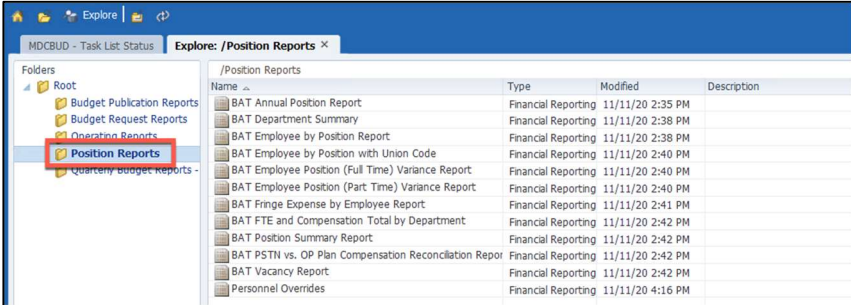
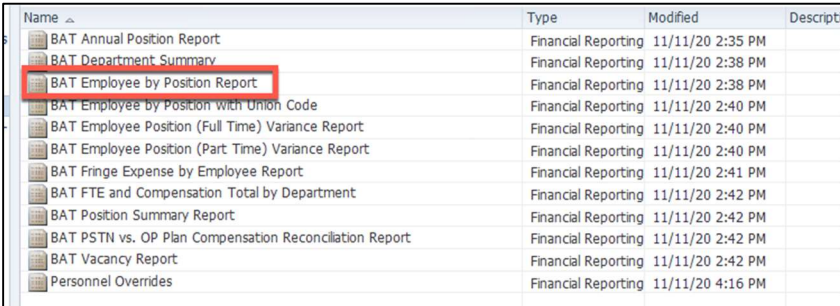
Lesson 3: BAT Employee by Position Report

Lesson Overview

This lesson will guide users through the steps to run the BAT Employee by Position report.

In this lesson you will learn:

- Navigate to the Position Reports folder
- Run the BAT Employee by Position Report

Step	Action	Notes
1	<p>From the home screen, select the "Explore" button.</p> 	
2	<p>Click on the "Position Reports" folder to open it.</p> 	
3	<p>Run the BAT Employee by Position Report in PDF by double clicking on the report name.</p> 	
4	<p>In the prompt window select:</p> <p>Scenario: Select either Budget or Current Year Personnel Forecast</p> <p>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</p> <p>Department: type in Department or use member selector to select a Department</p> <p>Click "OK".</p>	<p>This report displays personnel expense data broken out by employee, position, job code description and associated department.</p>

Respond to Prompts

The following prompts 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
 Enter Department: DPFN00000000 Type Report Source Report: BAT Employee by Position Report Grid: All

Enter Scenario: Budget Report Report: BAT Employee by Position Report Grid: Grid2

Edit Member Names

Enter Years: 2021-22 Report Report: BAT Employee by Position Report Grid: Grid2

Edit Member Names

5

Verify that the report runs.

Position	Employee	Job Code	Department	Total FTE	Employee Regular	Employee Part Time	Flex Dollars	Longevity Payments	Fringe Benefits	Personnel Services
POB00003799	HILDA CASTILLO - 00030370	CHIEF, HUMAN RESOURCES DIV - 00419	DFN01020000	1.00	\$140,956	\$0	\$1,100	\$4,248	\$91,881	\$188,186
POB00003800	VIVIAN DELGADO - 00039915	DIR.FIN.COMPR. & ADMIN DIVISION - 000373	DFN07020000	1.00	\$182,873	\$0	\$1,100	\$0	\$47,218	\$231,191
POB00003801	DAYAMI LABORDE - 00052635	SENIOR PERSONNEL SPECIALIST - 000412	DFN01020000	1.00	\$79,854	\$0	\$1,100	\$1,908	\$29,803	\$112,764
POB00003802	KARINA CARRERA - 00234436	ADMINISTRATIVE SECRETARY - 000284	DFN02010000	1.00	\$46,456	\$0	\$1,100	\$0	\$23,296	\$70,853
POB00003803	EMPVacancy	FINANCE SYSTEMS SUPPORT ADMIN - 000340	DFN03030000	1.00	\$110,022	\$0	\$1,100	\$0	\$35,596	\$146,719
POB00003804	MADILIN RIZZO - 00202035	ASSISTANT CONTROLLER - 000375	DFN03020000	1.00	\$173,497	\$0	\$1,100	\$2,780	\$46,007	\$223,383
POB00003805	DIANA GILZ - 00034783	ASSISTANT CONTROLLER - 000375	DFN02040000	1.00	\$173,497	\$0	\$1,100	\$4,905	\$56,491	\$237,993
POB00003806	MARIA HERNANDEZ - 00210015	ASSISTANT CONTROLLER - 000375	DFN02010000	1.00	\$141,735	\$0	\$1,100	\$2,104	\$41,820	\$186,759
POB00003807	BERTA RUFAT - 00025154	CONTROLLER - 000377	DFN02010000	1.00	\$194,299	\$0	\$1,100	\$0	\$48,722	\$244,121
POB00003810	JESSICA LOPEZ - 00313483	FINANCE SHARED SVC SPEC 2 - 000368	DFN02040500	1.00	\$60,347	\$0	\$1,100	\$0	\$25,960	\$87,427
POB00003811	ANA RIERA - 00138601	FINANCE SHARED SVC SPEC 2 - 000368	DFN02040500	1.00	\$68,956	\$0	\$1,100	\$1,396	\$27,754	\$99,205
POB00003812	RICHARD POYNALL - 00202824	FINANCE SHARED SVC SUP - 000369	DFN02040500	1.00	\$96,920	\$0	\$1,100	\$1,432	\$31,234	\$120,686
POB00003813	MARIE LUCAS - 00138129	OFFICE SUPPORT SPECIALIST 2 - 000021	DFN02040300	1.00	\$45,520	\$0	\$1,100	\$918	\$23,179	\$70,717

Rows:
 ->Position dimension (Level 0 descendants of Total Positions)
 ->Employee dimension (Level 0 descendants of Total Existing Employees)
 ->Job Code dimension (Level 0 descendants of Total Job Codes)
 ->Department dimension (Level 0 descendants of the Department selected in the prompt)

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)

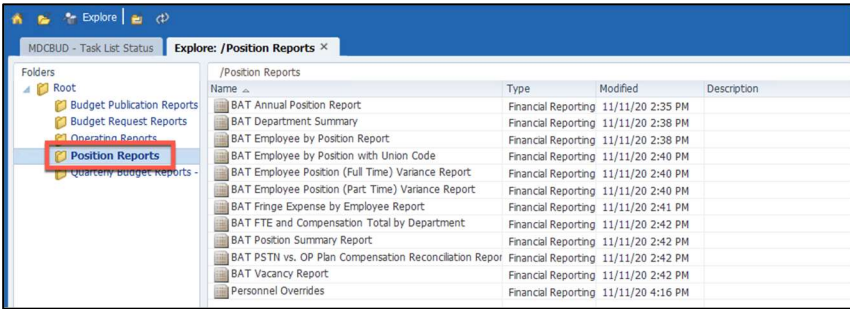

Lesson 4: BAT Employee by Position with Union Code

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:

- Navigate to the Position Reports folder
- Run the BAT Employee by Position with Union Code report

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 by Position Report with Union Code 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 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.

		F: Longevity Payments (Account) G: Fringe Benefits (Account) H: Personnel Services (Account)
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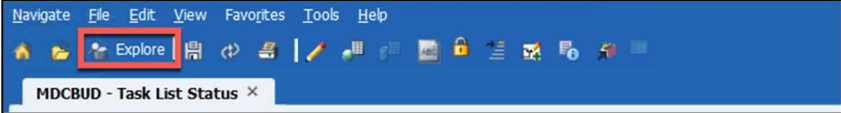
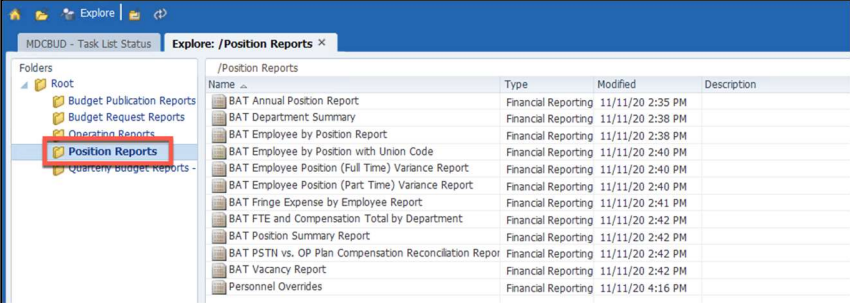
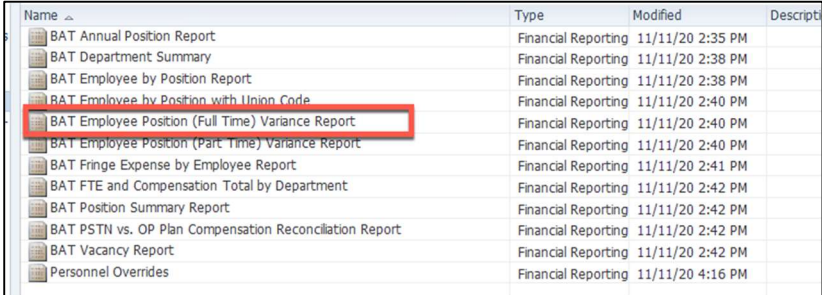
Lesson 5: BAT Employee Position (Full Time) Variance Report

Lesson Overview

This lesson will guide users through the steps to run the BAT Employee Position (Full Time) Variance Report.

In this lesson you will learn:

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

Step	Action	Notes
1	<p>From the home screen, select the "Explore" button.</p> 	
2	<p>Click on the "Position Reports" folder to open it.</p> 	
3	<p>Run the BAT Employee Position (Full Time) Variance Report in PDF by double clicking on the report name.</p> 	
4	<p>In the prompt window select:</p> <p>Scenario: Select either Budget or Current Year Personnel Forecast</p> <p>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</p> <p>Department: type in Department or use member selector to select a Department</p> <p>Click "OK".</p>	<p>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.</p>

Respond to Prompts

The following prompts 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:	DPPN00000000	Report	Report: BAT Employee Position (Full Time) Variance Report Grid: All
Enter Scenario:	Budget	Report	Report: BAT Employee Position (Full Time) Variance Report Grid: Grid2
Enter Years:	2021-22	Report	Report: BAT Employee Position (Full Time) Variance Report Grid: Grid2

Edit Member Names

Edit Member Names

Buttons: Help, OK, Cancel, Reset

5

Verify that the report runs.

				Employee Regular 2021-22	Employee Variance \$	Employee Variance %
EMP/Vacancy	FINANCE COLLECTION SPECIALIST - 000308	PO800021208	FN06100100 - CREDIT & COLLECTIONS	\$49,410	\$49,410	0%
EMP/Vacancy	FINANCE COLLECTION SPECIALIST - 000308	PO800021214	FN06100100 - CREDIT & COLLECTIONS	\$49,410	\$49,410	0%
EMP/Vacancy	ACCOUNT CLERK - 000310	PO800003828	FN02020200 - GENERAL ACCOUNTING	\$36,560	\$36,560	0%
EMP/Vacancy	ACCOUNT CLERK - 000310	PO800003878	FN06060000 - AUTO TAG SECTION	\$36,560	\$36,560	0%
EMP/Vacancy	ACCOUNT CLERK - 000310	PO800025792	FN06060000 - AUTO TAG SECTION	\$36,560	\$36,560	0%
EMP/Vacancy	PARALEGAL SUPPORT SPECIALIST - 000312	PO800025813	FN06050000 - AD VALOREM SECTION	\$43,738	\$43,738	0%
EMP/Vacancy	FINANCE COLLEENFORCEMENT OFC - 000348	PO800003863	FN06070000 - CONVENTION & TOURISM SECTION	\$49,410	\$49,410	0%
EMP/Vacancy	TAX RECORDS SPECIALIST 2 - 000390	PO800003904	FN06050000 - AD VALOREM SECTION	\$38,987	\$38,987	0%
EMP/Vacancy	TAX RECORDS SPECIALIST 2 - 000390	PO800017700	FN06080000 - LOCAL BUSINESS TAX SECTION	\$38,987	\$38,987	0%
EMP/Vacancy	TAX RECORDS SPECIALIST 2 - 000390	PO800024368	FN06050000 - AD VALOREM SECTION	\$38,987	\$38,987	0%
EMP/Vacancy	SENIOR TAX RECORDS SPECIALIST - 000351	PO800022772	FN06060000 - AUTO TAG SECTION	\$43,738	\$43,738	0%
EMP/Vacancy	FINANCE SHARED SVC TECH - 000365	PO800015228	FN02040000 - ACCOUNTS PAYABLE WORKFLOW	\$36,560	\$36,560	0%
EMP/Vacancy	COUNTY COMMISSION CLERK 2 - 004041	PO800026048	FN06100200 - CODE ENFORCEMENT BILLING	\$40,480	\$40,480	0%
EMP/Vacancy	COUNTY COMMISSION CLERK 2 - 004041	PO800026356	FN06100200 - CODE ENFORCEMENT BILLING	\$40,480	\$40,480	0%
EMP/Vacancy	CLERK 4 - 000013	PO800003827	FN02020200 - GENERAL ACCOUNTING	\$44,258	\$44,258	0%
EMP/Vacancy	CLERK 4 - 000013	PO800023303	FN06060000 - AUTO TAG SECTION	\$44,258	\$44,258	0%
EMP/Vacancy	CREDIT & COLLECTIONS SUP - 000309	PO800021207	FN06100100 - CREDIT & COLLECTIONS	\$65,050	\$65,050	0%
EMP/Vacancy	ACCOUNTANT 2 - 000316	PO800003853	FN02040400 - BANK RECONCILIATION	\$65,050	\$65,050	0%
EMP/Vacancy	ACCOUNTANT 2 - 000316	PO800003846	FN06020000 - ACCOUNTING SECTION	\$65,050	\$65,050	0%
EMP/Vacancy	ACCOUNTANT 2 - 000316	PO800023120	FN02030200 - FEMA REPORTING	\$65,050	\$65,050	0%
EMP/Vacancy	ACCOUNTANT 2 - 000316	PO800023764	FN02020200 - GENERAL ACCOUNTING	\$65,050	\$65,050	0%

Rows:

- >Employee dimension (EMP/Vacancy, Level 0 descendants of Total Existing Employees)
- >Job Code dimension (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 %

		formula column (percentage)
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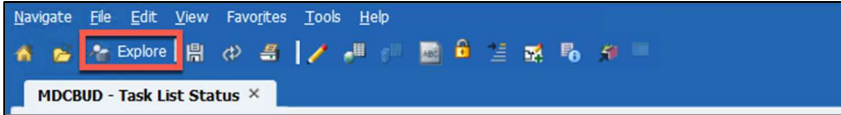
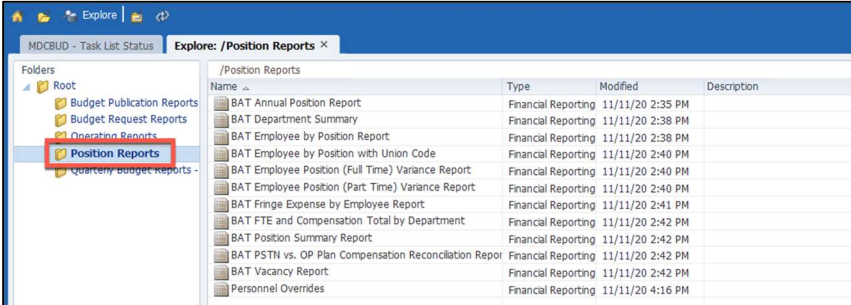
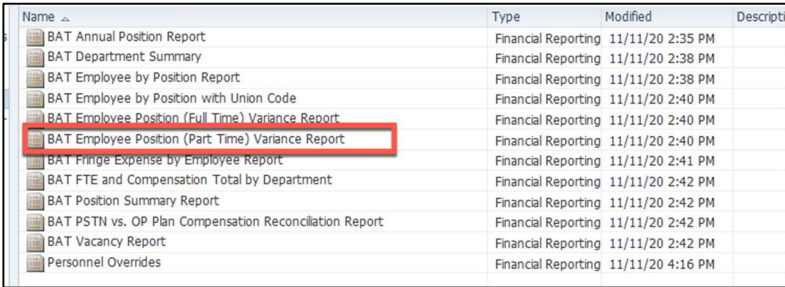
Lesson 6: BAT Employee Position (Part Time) Variance Report

Lesson Overview

This lesson will guide users through the steps to run the BAT Employee Position (Part Time) Variance Report.

In this lesson you will learn:

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

Step	Action	Notes
1	<p>From the home screen, select the "Explore" button.</p> 	
2	<p>Click on the "Position Reports" folder to open it.</p> 	
3	<p>Run the BAT Employee Position (Part Time) Variance Report in PDF by double clicking on the report name.</p> 	
4	<p>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".</p>	<p>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.</p>

Respond to Prompts

The following prompts have been defined in the report. You may use the default values shown, or select other members.

Respond to Prompts at Report Level v

Prompt Selection Type Report

Enter Department: DPFN00000000 Report

Enter Scenario: Budget Report

Edit Member Names

Enter Years: 2021-22 Report

Edit Member Names

Source: Report: BAT Employee Position (Part Time)
Variance Report
Grid: All

Report: BAT Employee Position (Part Time)
Variance Report
Grid: Grid2

Report: BAT Employee Position (Part Time)
Variance Report
Grid: Grid2

Help OK Cancel Reset

5

Verify that the report runs.

EMP/Vacancy	Department	Position	Job Code	Part Time Employee 2021-22	Employee Variance \$	Employee Variance %
EMP/Vacancy	CAPITAL INVENTORY CLERK - 000223	PO800019607	FR06030100 - LOGISTICS DIVISION ADMIN	\$36,796	\$36,796	0%
EMP/Vacancy	CAPITAL INVENTORY CLERK - 000223	PO800019609	FR06030100 - LOGISTICS DIVISION ADMIN	\$36,796	\$36,796	0%
EMP/Vacancy	FIRE/LIFE SAFETY TRAINING REP - 004131	PO800025931	FR02010600 - PUBLIC EDUCATION	\$42,860	\$42,860	0%
EMP/Vacancy	FIRE RESCUE PROCESSING SPEC 1 - 004132	PO800025952	FR02010600 - PERMITTING & RECORDS UNIT	\$36,796	\$36,796	0%
EMP/Vacancy	FIRE RESCUE PROCESSING SPEC 1 - 004132	PO800025953	FR02010100 - FIRE ENGINEERING BUREAU	\$36,796	\$36,796	0%
EMP/Vacancy	MDFR TV PRODUCER - 004138	PO800002166	FR01040000 - PUBLIC MEDIA	\$66,473	\$66,473	0%
EMP/Vacancy	MDFR LIFE GUARD 1 - 004158	PO800007433	FR03040302 - LIFE OCEAN HAULOVER	\$11,747	\$11,747	0%
EMP/Vacancy	MDFR LIFE GUARD 1 - 004158	PO800007480	FR03040302 - LIFE OCEAN HAULOVER	\$11,747	\$11,747	0%
EMP/Vacancy	MDFR LIFE GUARD 1 - 004158	PO800007481	FR03040301 - LIFE OCEAN ORANODON	\$11,747	\$11,747	0%
EMP/Vacancy	MDFR LIFE GUARD 1 - 004158	PO800007483	FR03040302 - LIFE OCEAN HAULOVER	\$11,747	\$11,747	0%
EMP/Vacancy	MDFR LIFE GUARD 1 - 004158	PO800007472	FR03040302 - LIFE OCEAN HAULOVER	\$11,747	\$11,747	0%
EMP/Vacancy	MDFR LIFE GUARD 1 - 004158	PO800007474	FR03040302 - LIFE OCEAN HAULOVER	\$11,747	\$11,747	0%
EMP/Vacancy	MDFR LIFE GUARD 1 - 004158	PO800007475	FR03040302 - LIFE OCEAN HAULOVER	\$35,241	\$35,241	0%
EMP/Vacancy	MDFR LIFE GUARD 1 - 004158	PO800007478	FR03040302 - LIFE OCEAN HAULOVER	\$11,747	\$11,747	0%
EMP/Vacancy	MDFR LIFE GUARD 1 - 004158	PO800007486	FR03040302 - LIFE OCEAN HAULOVER	\$11,747	\$11,747	0%
EMP/Vacancy	MDFR LIFE GUARD 1 - 004158	PO800007483	FR03040302 - LIFE OCEAN HAULOVER	\$11,747	\$11,747	0%

Rows:

- >Employee dimension (EMP/Vacancy, Level 0 descendants of Total Existing Employees)
- >Job Code dimension (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: 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 %

		formula column (percentage)
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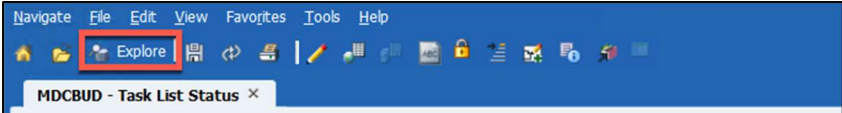
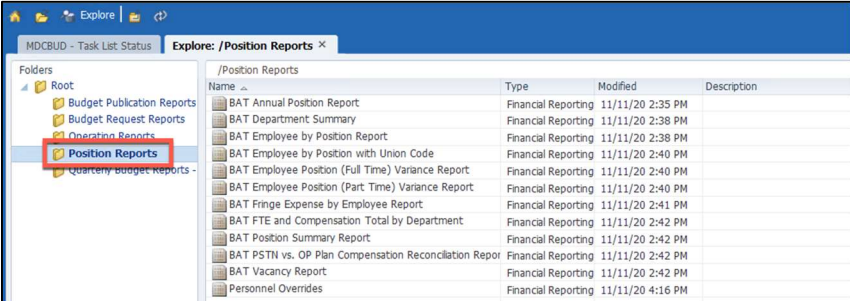
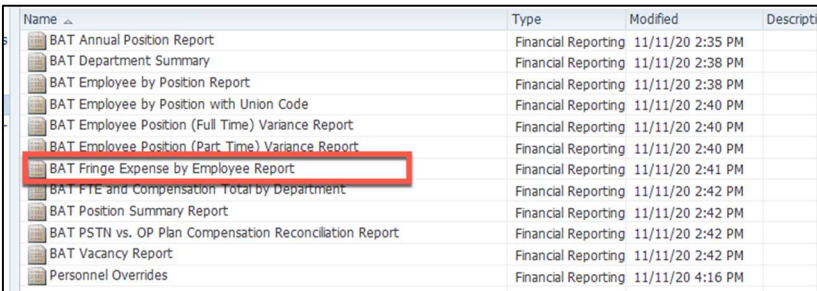
Lesson 7: BAT Fringe Expense by Employee Report

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:

- Navigate to the Position Reports folder
- Run the BAT Fringe Expense by Employee Report

Step	Action	Notes
1	<p>From the home screen, select the "Explore" button.</p> 	
2	<p>Click on the "Position Reports" folder to open it.</p> 	
3	<p>Run the BAT Fringe Expense by Employee Report in PDF by double clicking on the report name.</p> 	
4	<p>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".</p>	<p>This position report displays a breakout of fringe expenses (social security, retirement, group health insurance, etc.) and FT/PT filled and vacant FTE data by employee and position for the selected Department.</p>

		G: Retirement (Account) H: Group Health Insurance (Account) I: Group Life Insurance (Account) J: MICA Medicare Hospital Insurance (Account) K: Dental Plans (Account)
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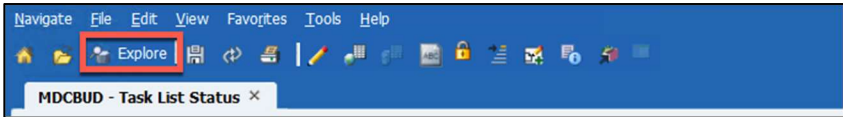
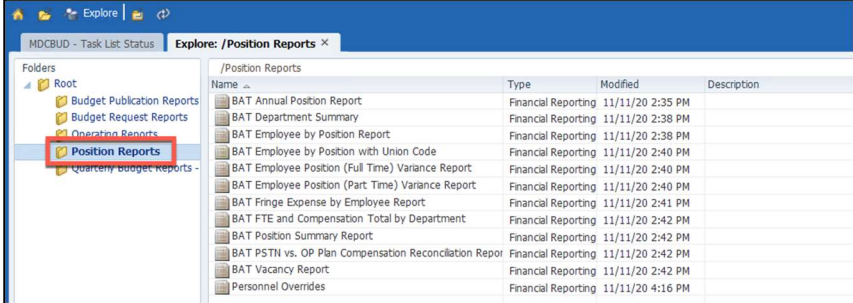
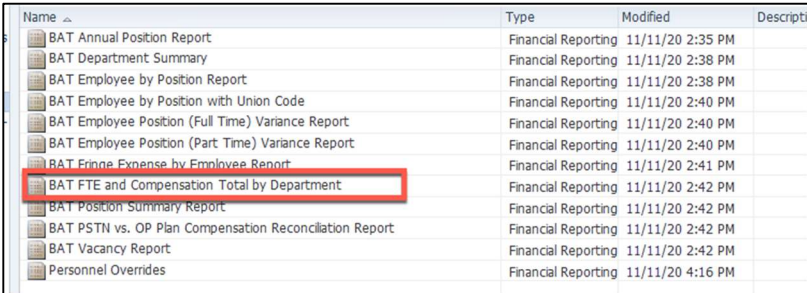
Lesson 8: BAT FTE and Compensation Total by Department Report

Lesson Overview

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

In this lesson you will learn:

- Navigate to the Position Reports folder
- Run the BAT FTE and Compensation Total by Department Report

Step	Action	Notes
1	<p>From the home screen, select the "Explore" button.</p> 	
2	<p>Click on the "Position Reports" folder to open it.</p> 	
3	<p>Run the BAT FTE and Compensation Total by Department Report in PDF by double clicking on the report name.</p> 	
4	<p>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".</p>	<p>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.</p>

Respond to Prompts

The following prompts have been defined in the report. You may use the default values shown, or select other members.

Prompt Selection Type Source
 Enter Scenario: Budget Report Report: BAT FTE and Compensation Total by Department by Department Grid: Grid2

Edit Member Names

Enter Years: 2021-22 Report Report: BAT FTE and Compensation Total by Department by Department Grid: Grid2

Edit Member Names

Enter Department: DPFN00000000 Report Report: BAT FTE and Compensation Total by Department by Department Grid: Grid2

Help OK Cancel Reset

5

Verify that the report runs.

BAT
BUDGETING ANALYSIS TOOL

Miami-Dade County
BAT FTE and Compensation Total by Department
 For Department: FPN0000000 - FINANCE DEPARTMENT
 For Fiscal Year: 2021-22
 For Scenario: Budget

	Total FTE	Budget Year Starting Salary		Merit	Total Salary	Total Additional Earnings		Total Benefits	Total Retirement	Total Taxes	Total Compensation
		2021-22	2021-22			2021-22	2021-22				
EMPVacancy	1.00	\$108,202	\$0	\$108,202	\$2,920	\$14,828	\$12,853	\$6,417	\$146,719		
EMPVacancy	1.00	\$42,438	\$0	\$42,438	\$2,920	\$14,260	\$8,990	\$3,288	\$66,223		
EMPVacancy	1.00	\$24,740	\$0	\$24,740	\$2,920	\$14,373	\$4,204	\$2,797	\$58,258		
EMPVacancy	1.00	\$83,220	\$0	\$83,220	\$2,920	\$14,433	\$7,481	\$4,876	\$98,240		
EMPVacancy	1.00	\$54,832	\$0	\$54,832	\$2,920	\$14,816	\$8,828	\$4,542	\$81,128		
EMPVacancy	1.00	\$27,187	\$0	\$27,187	\$2,920	\$14,376	\$4,484	\$2,683	\$41,932		
EMPVacancy	1.00	\$71,190	\$0	\$71,190	\$2,920	\$14,483	\$8,288	\$5,044	\$108,753		
EMPVacancy	1.00	\$82,220	\$0	\$82,220	\$2,920	\$14,433	\$7,481	\$4,876	\$98,240		
EMPVacancy	1.00	\$47,890	\$0	\$47,890	\$2,920	\$14,400	\$8,882	\$2,780	\$74,373		
EMPVacancy	1.00	\$24,740	\$0	\$24,740	\$2,920	\$14,373	\$4,204	\$2,797	\$58,258		
EMPVacancy	1.00	\$128,221	\$0	\$128,221	\$2,920	\$14,886	\$18,772	\$10,492	\$179,121		
EMPVacancy	1.00	\$87,248	\$0	\$87,248	\$2,920	\$14,484	\$10,284	\$5,837	\$117,629		
EMPVacancy	1.00	\$42,438	\$0	\$42,438	\$2,920	\$14,260	\$8,990	\$3,288	\$66,223		
EMPVacancy	1.00	\$83,332	\$0	\$83,332	\$2,920	\$14,413	\$8,343	\$4,219	\$81,228		
EMPVacancy	1.00	\$27,187	\$0	\$27,187	\$2,920	\$14,378	\$4,484	\$2,683	\$41,932		
EMPVacancy	1.00	\$24,740	\$0	\$24,740	\$2,920	\$14,373	\$4,204	\$2,797	\$58,258		
EMPVacancy	1.00	\$32,899	\$0	\$32,899	\$2,920	\$14,372	\$4,108	\$2,732	\$58,221		
EMPVacancy	1.00	\$99,497	\$0	\$99,497	\$2,920	\$14,910	\$11,848	\$7,748	\$128,204		
EMPVacancy	1.00	\$82,274	\$0	\$82,274	\$2,920	\$14,487	\$7,741	\$4,790	\$98,913		
EMPVacancy	1.00	\$47,890	\$0	\$47,890	\$2,920	\$14,400	\$8,882	\$2,780	\$74,373		
EMPVacancy	1.00	\$41,919	\$0	\$41,919	\$2,920	\$14,268	\$8,220	\$3,548	\$67,854		
EMPVacancy	1.00	\$12,887	\$0	\$12,887	\$2,920	\$14,484	\$8,998	\$5,700	\$104,481		
EMPVacancy	1.00	\$83,220	\$0	\$83,220	\$2,920	\$14,433	\$7,481	\$4,876	\$98,240		

Rows:
 ->Employee dimension (EMPVacancy, Level 0 descendants of Total Employees)
 ->Position dimension (Level 0 descendants of Total Positions)
 ->Job Code dimension (Level 0 descendants of Total Job Codes)

Columns (all for Year / Scenario prompt selections):
 A: Total FTE
 B: Budget Year Starting Salary
 C: Merit
 D: COLA
 E: Furlough Deduction
 F: Total Salary
 G: Total Additional Earnings
 H: Total Benefits
 I: Total Retirement

		J: Total Taxes K: Total Compensation
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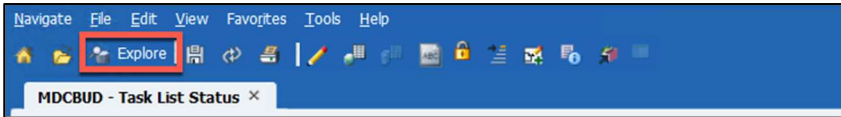
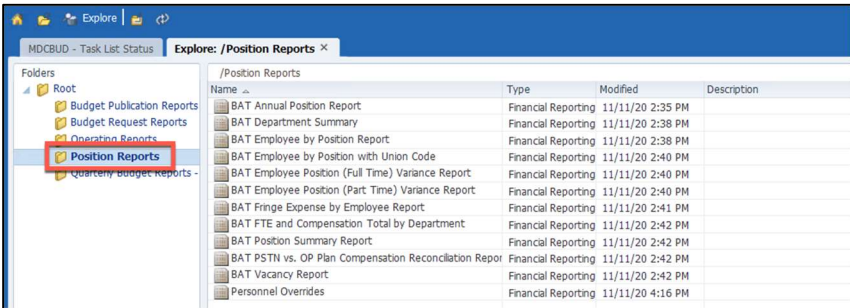

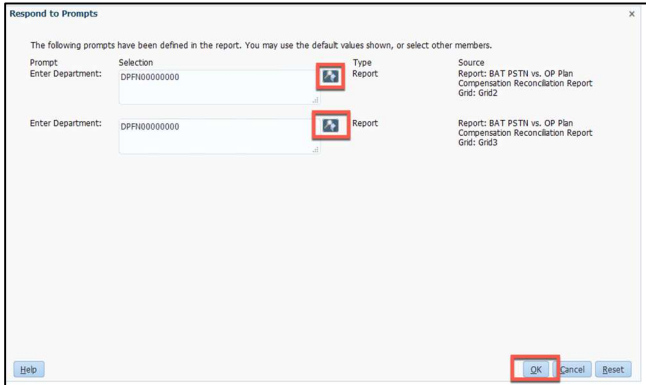
Lesson 9: BAT PSTN vs. OP Plan Compensation Reconciliation Report

Lesson Overview

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

In this lesson you will learn:

- Navigate to the Position Reports folder
- Run the BAT PSTN vs. OP Plan Compensation Reconciliation Report

Step	Action	Notes
1	<p>From the home screen, select the "Explore" button.</p> 	
2	<p>Click on the "Position Reports" folder to open it.</p> 	
3	<p>Run the BAT PSTN vs. OP Plan Compensation Reconciliation Report in PDF by double clicking on the report name.</p> 	
4	<p>In the prompt window select:</p> <p>Department: type in Department or use member selector to select a Department</p> <p>Department: type in the same Department or use member selector to select the Department</p> <p>Click "OK".</p> 	<p>This report allows users to ensure that Total FTE and Total Compensation Expense are aligned between the PSTN_RPT and FINSTMT cubes.</p> <p>In the future state, PSTN_RPT is like HCP and FINSTMT is like OP Plan.</p>

5

Verify that the report runs.

PSTN Reporting			FINSTMT		
	Total FTE	Total Compensation Expense		Total FTE	Total Compensation Expense
DFN01010000	10	\$1,463,393	DFN01010000	10	\$1,463,393
DFN02010000	3	\$478,216	DFN02010000	3	\$478,216
DFN02020200	19	\$1,936,948	DFN02020200	19	\$1,936,948
DFN02030200	5	\$654,472	DFN02030200	5	\$654,472
DFN02030300	8	\$937,923	DFN02030300	8	\$937,923
DFN02040200	39	\$3,332,524	DFN02040200	39	\$3,332,524
DFN02040300	1	\$68,101	DFN02040300	1	\$68,101

Rows:

->Department dimension (Level 0 descendants of the Department selected in the prompt)

Columns (always for budget year / budget scenario):

- A: Total FTE (Account)
- B: Personnel Services (Account)

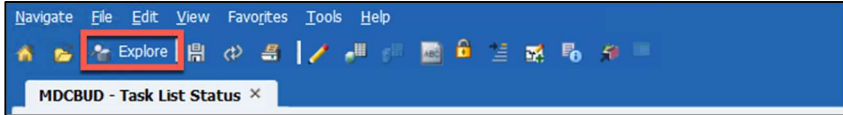

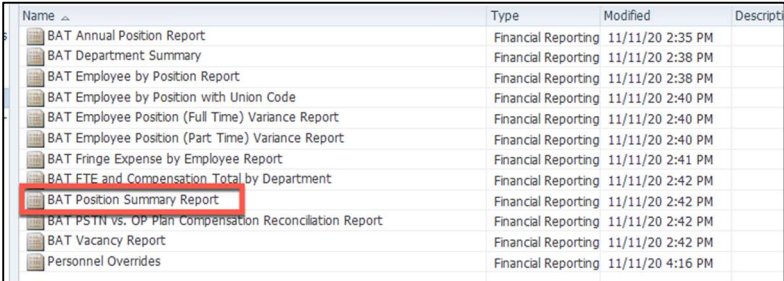
Lesson 10: BAT Position Summary Report

Lesson Overview

This lesson will guide users through the steps to run the BAT Position Summary Report.

In this lesson you will learn:

- Navigate to the Position Reports folder
- Run the BAT Position Summary Report

Step	Action	Notes
1	<p>From the home screen, select the "Explore" button.</p> 	
2	<p>Click on the "Position Reports" folder to open it.</p> 	
3	<p>Run the BAT Position Summary Report in PDF by double clicking on the report name.</p> 	
4	<p>In the prompt window select:</p> <p>Scenario: Select either Budget or Current Year Personnel Forecast</p> <p>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</p> <p>Department: type in Department or use member selector to select a Department</p> <p>Click "OK".</p>	<p>This report displays summary FTE data broken out by positions with their job code descriptions.</p>

5

Verify that the report runs.

Job Codes	Positions	Full Time Filled FTE	Part Time Filled FTE	FTE Vacant	Total FTE
CLERK 2 - 000011	POS00018419	1.00	0.00	0.00	1.00
CLERK 2 - 000011	POS00020116	1.00	0.00	0.00	1.00
OFFICE SUPPORT SPECIALIST 2 - 000021	POS00003813	1.00	0.00	0.00	1.00
INVENTORY CLERK - 000202	POS00003950	1.00	0.00	0.00	1.00
INVENTORY CLERK - 000202	POS00003977	1.00	0.00	0.00	1.00
INVENTORY CLERK - 000202	POS00015106	1.00	0.00	0.00	1.00
INVENTORY CLERK - 000202	POS00018792	1.00	0.00	0.00	1.00
MEDICAL BILLING CLERK - 000304	POS00003990	1.00	0.00	0.00	1.00
PARALEGAL COLLECTION SPEC - 000305	POS00003957	1.00	0.00	0.00	1.00

Rows:
 ->JobCode dimension (Level 0 descendants of Total Job Codes)
 ->Position dimension (Level 0 descendants of Total Positions)

Columns (all for Year / Scenario prompt selections):
 A: Full Time Filled FTE (Account)
 B: Part Time Filled FTE (Account)
 C: FTE Vacant (Account)
 D: Total FTE (Account)

Lesson 11: BAT Vacancy Report

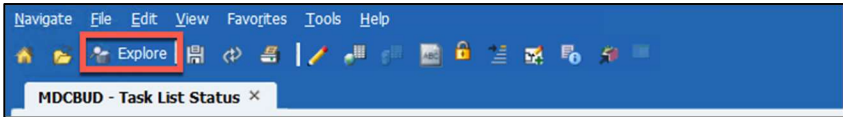
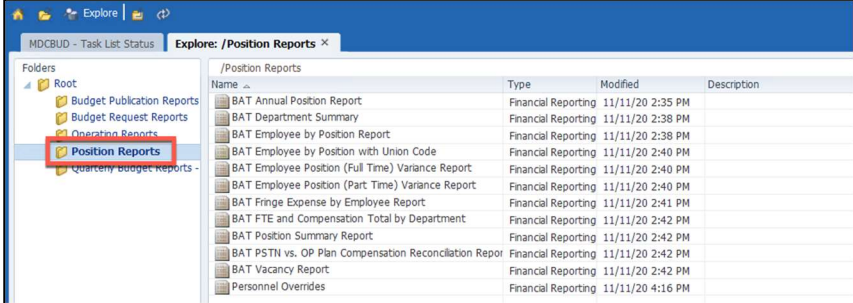
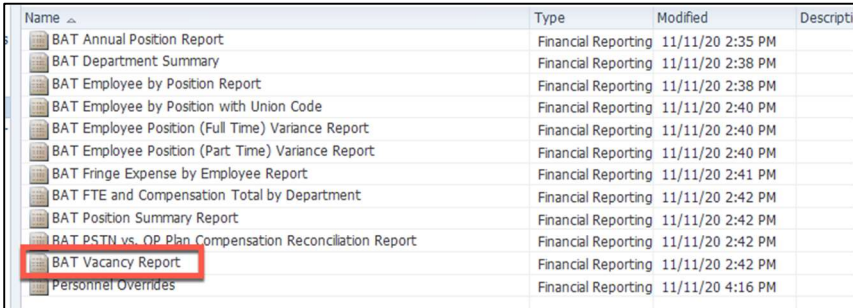
Lesson

This lesson will guide users through the steps to run the BAT Vacancy Report.

Overview

In this lesson
you will learn:

- Navigate to the Position Reports folder
- Run the BAT Vacancy Report

Step	Action	Notes
1	<p>From the home screen, select the "Explore" button.</p> 	
2	<p>Click on the "Position Reports" folder to open it.</p> 	
3	<p>Run the BAT Vacancy Report in PDF by double clicking on the report name.</p> 	
4	<p>In the prompt window select:</p> <p>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</p> <p>Click "OK".</p>	<p>This position report displays Full Time/Part Time vacant positions and the associated salary and fringe benefit dollars for the Department selected in the prompt.</p>

5

Verify that the report runs.

		Full Time Vacant FTE	Part Time Vacant FTE	Employee Regular	Flex Dollars	Fringe Benefits	Personnel Services
FINANCE COLLECTION SPECIALIST - 000308	POS00021208	1.00	0.00	\$49,410	\$1,100	\$23,863	\$74,373
FINANCE COLLECTION SPECIALIST - 000308	POS00021214	1.00	0.00	\$49,410	\$1,100	\$23,863	\$74,373
ACCOUNT CLERK - 000310	POS00003829	1.00	0.00	\$36,560	\$1,100	\$21,375	\$59,035
ACCOUNT CLERK - 000310	POS00003978	1.00	0.00	\$36,560	\$1,100	\$21,375	\$59,035
ACCOUNT CLERK - 000310	POS00025792	1.00	0.00	\$36,560	\$1,100	\$21,375	\$59,035
PARALEGAL SUPPORT SPECIALIST - 000312	POS00025813	1.00	0.00	\$43,739	\$1,100	\$22,765	\$67,604
FINANCE COL&ENFORCEMENT OFC - 000348	POS00003963	1.00	0.00	\$49,410	\$1,100	\$23,863	\$74,373
TAX RECORDS SPECIALIST 2 - 000350	POS00003904	1.00	0.00	\$38,987	\$1,100	\$21,845	\$61,932

Rows:

- >Job Code dimension (Level 0 descendants of Total Job Codes)
- >Position dimension (Level 0 descendants of Total Positions)
- >*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


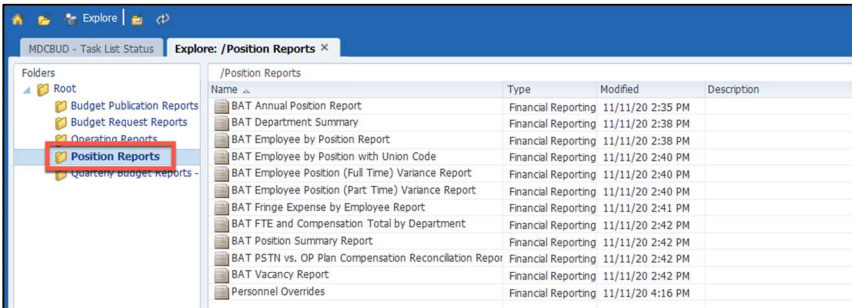
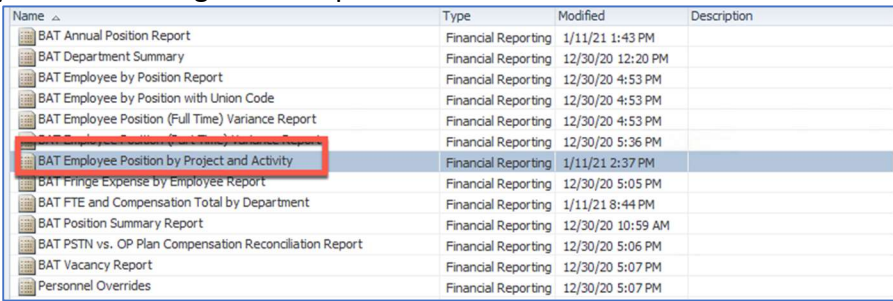
Lesson 12: BAT Employee Position by Project and Activity

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:

- Navigate to the Position Reports folder
- Run the BAT Employee Position by Project and Activity

Step	Action	Notes
1	<p>From the home screen, select the "Explore" button.</p> 	
2	<p>Click on the "Position Reports" folder to open it.</p> 	
3	<p>Run the BAT Employee Position by Project and Activity Report in PDF by double clicking on the report name.</p> 	
4	<p>In the prompt window select:</p> <p>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)</p> <p>Click "OK".</p>	<p>This position report displays the combinations of project, activity, department, positions and employees for the Department, Fund and Grant selected in the prompt.</p>

Respond to Prompts

Prompt
Enter Department: DPFN0000000 Report Type Report

Select Fund: All Funds Report Report: BAT Employee Position by Project and Activity Grid: Grid2

Edit Member Names

Select Grant: All Grants Report 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

Enter Years: 2021-22 Report Report: BAT Employee Position by Project and Activity Grid: Grid2

OK Cancel Reset

5 Verify that the report runs.

Project	Activity	Department	Position	Employee	FTE	Total Compensation
No Project	No Activity	DFN01010000	POS00024419	BARBARA GOMEZ - 00323623	1.00	\$349,081
No Project	No Activity	DFN01010000	POS00025193	JACQUELINE CASTILLO - 00315638	1.00	\$69,274
No Project	No Activity	DFN01020000	POS00003799	HILDA CASTILLO - 00030370	1.00	\$198,186
No Project	No Activity	DFN01020000	POS00003901	DAYANI LABORDE - 00062635	1.00	\$112,764
No Project	No Activity	DFN01020000	POS00017853	MARTA RUIZ - 00034633	1.00	\$120,972
No Project	No Activity	DFN01020000	POS00023762	LAZANIA BAKER - 00078645	1.00	\$113,718
No Project	No Activity	DFN02010000	POS00003802	KARINA CARRERA - 00324436	1.00	\$70,883
No Project	No Activity	DFN02010000	POS00003806	MARIA HERNANDEZ - 00210015	1.00	\$166,759
No Project	No Activity	DFN02010000	POS00003807	BERTA RUFAT - 00025154	1.00	\$244,121
No Project	No Activity	DFN02020000	POS00003827	EMP/Vacancy	1.00	\$68,223
No Project	No Activity	DFN02020000	POS00003829	EMP/Vacancy	1.00	\$59,035
No Project	No Activity	DFN02020000	POS00003851	KAREN DE LA CONCEPCION - 00317543	1.00	\$70,020
No Project	No Activity	DFN02020000	POS00003860	LORI MADRIGAL - 00015688	1.00	\$144,251
No Project	No Activity	DFN02020000	POS00003864	ERICA OLSON - 00070716	1.00	\$135,017
No Project	No Activity	DFN02020000	POS00003868	ANGEL RODRIGUEZ, JR - 00317089	1.00	\$112,478
No Project	No Activity	DFN02020000	POS00018420	DAVID BAYLES - 00325590	1.00	\$55,372

Rows:

- >Project dimension (Level 0 descendants of All Projects)
- >Activity dimension (Level 0 descendants of All Activities)
- >Department dimension (Level 0 descendants of Total Department)
- >Position dimension (Level 0 descendants of 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

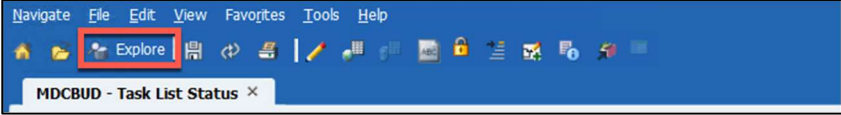
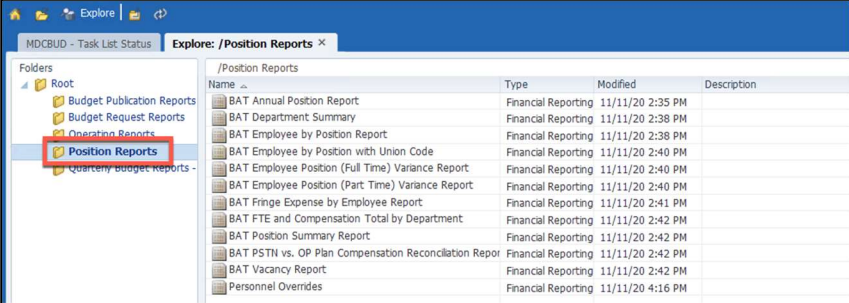
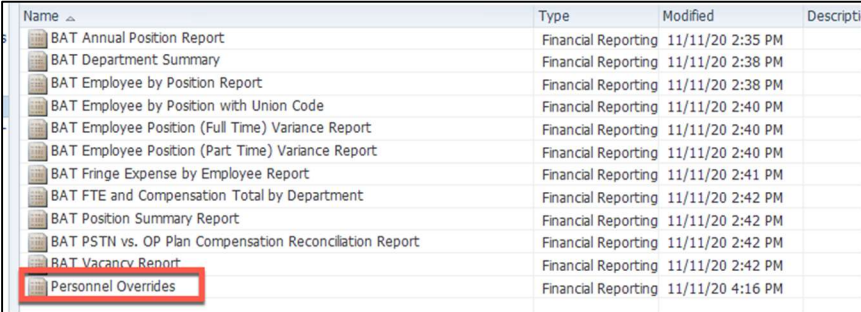
Lesson

This lesson will guide users through the steps to run the Personnel Overrides Report.

Overview

In this lesson
you will learn:

- Navigate to the Position Reports folder
- Run the Personnel Overrides Report

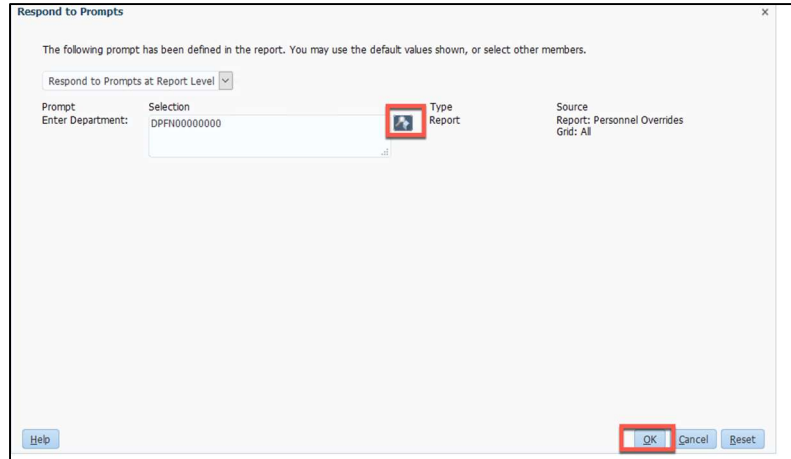
Step	Action	Notes																																																				
1	<p>From the home screen, select the "Explore" button.</p> 																																																					
2	<p>Click on the "Position Reports" folder to open it.</p> 																																																					
3	<p>Run the Personnel Overrides Report in PDF by double clicking on the report name.</p>  <table border="1" data-bbox="298 833 1154 1142"> <thead> <tr> <th>Name</th> <th>Type</th> <th>Modified</th> <th>Description</th> </tr> </thead> <tbody> <tr><td>BAT Annual Position Report</td><td>Financial Reporting</td><td>11/11/20 2:35 PM</td><td></td></tr> <tr><td>BAT Department Summary</td><td>Financial Reporting</td><td>11/11/20 2:38 PM</td><td></td></tr> <tr><td>BAT Employee by Position Report</td><td>Financial Reporting</td><td>11/11/20 2:38 PM</td><td></td></tr> <tr><td>BAT Employee by Position with Union Code</td><td>Financial Reporting</td><td>11/11/20 2:40 PM</td><td></td></tr> <tr><td>BAT Employee Position (Full Time) Variance Report</td><td>Financial Reporting</td><td>11/11/20 2:40 PM</td><td></td></tr> <tr><td>BAT Employee Position (Part Time) Variance Report</td><td>Financial Reporting</td><td>11/11/20 2:40 PM</td><td></td></tr> <tr><td>BAT Fringe Expense by Employee Report</td><td>Financial Reporting</td><td>11/11/20 2:41 PM</td><td></td></tr> <tr><td>BAT FTE and Compensation Total by Department</td><td>Financial Reporting</td><td>11/11/20 2:42 PM</td><td></td></tr> <tr><td>BAT Position Summary Report</td><td>Financial Reporting</td><td>11/11/20 2:42 PM</td><td></td></tr> <tr><td>BAT PSTN vs. OP Plan Compensation Reconciliation Report</td><td>Financial Reporting</td><td>11/11/20 2:42 PM</td><td></td></tr> <tr><td>BAT Vacancy Report</td><td>Financial Reporting</td><td>11/11/20 2:42 PM</td><td></td></tr> <tr><td>Personnel Overrides</td><td>Financial Reporting</td><td>11/11/20 4:16 PM</td><td></td></tr> </tbody> </table>	Name	Type	Modified	Description	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 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		
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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:

Department: type in Department or use member selector to select a Department

Click "OK".



This position report displays every position and associated employee from the selected Department that is being excluded from the nightly HCM update. The columns display employee/position information associated with these flagged employees/positions such as budget amount, employee name, job code, salary grade, etc. The positions and employees listed on this report indicates position information that was manually adjusted and that does not want to be synced with HCM.

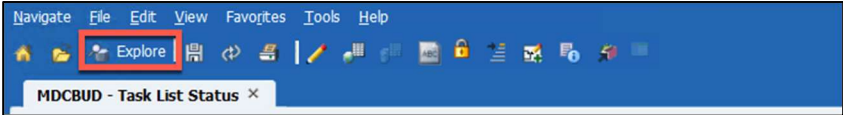

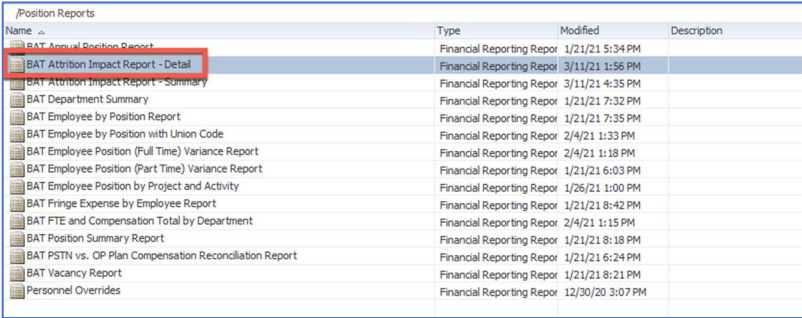
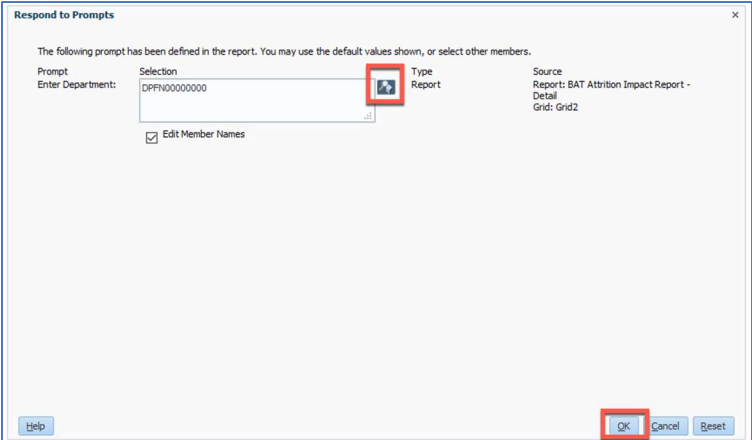
Lesson 14: BAT Attrition Impact Report - Detail


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:

- Navigate to the Position Reports folder
- Run the BAT Attrition Impact Report - Detail

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

<p>5</p>	<p>Verify that the report runs.</p> <div data-bbox="224 352 1123 672" style="border: 1px solid black; padding: 10px;">  <p style="text-align: center;"><i>Miami-Dade County</i> BAT Attrition Impact Report - Detail For Department: CT01010000 - DIRECTOR'S OFFICE For Fiscal Year: 2021-22 For Scenario: Budget</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;"></th> <th style="text-align: right;">Personnel Excluding Attrition</th> <th style="text-align: right;">Attrition</th> <th style="text-align: right;">Budget Amount</th> </tr> </thead> <tbody> <tr> <td>CT01010000 - DIRECTOR'S OFFICE</td> <td style="text-align: right;">\$751,641</td> <td style="text-align: right;">(\$37,131)</td> <td style="text-align: right;">\$714,510</td> </tr> <tr> <td>CT01000000 - DIRECTOR'S OFFICE</td> <td style="text-align: right;">\$751,641</td> <td style="text-align: right;">(\$37,131)</td> <td style="text-align: right;">\$714,510</td> </tr> <tr> <td>CT02010000 - 311 CONTACT CENTER</td> <td style="text-align: right;">\$9,413,202</td> <td style="text-align: right;">(\$466,154)</td> <td style="text-align: right;">\$8,947,048</td> </tr> <tr> <td>CT02000000 - 311 CONTACT CENTER</td> <td style="text-align: right;">\$9,413,202</td> <td style="text-align: right;">(\$466,154)</td> <td style="text-align: right;">\$8,947,048</td> </tr> <tr> <td>CT03030000 - DIGITAL COMMUNICATIONS</td> <td style="text-align: right;">\$2,311,675</td> <td style="text-align: right;">(\$114,509)</td> <td style="text-align: right;">\$2,197,166</td> </tr> <tr> <td>CT03040000 - DIGITAL MEDIA SERVICES</td> <td style="text-align: right;">\$2,038,924</td> <td style="text-align: right;">(\$101,186)</td> <td style="text-align: right;">\$1,937,739</td> </tr> <tr> <td>CT03060000 - CREATIVE & BRANDING SERVICES</td> <td style="text-align: right;">\$1,162,194</td> <td style="text-align: right;">(\$57,814)</td> <td style="text-align: right;">\$1,104,380</td> </tr> <tr> <td>CT03090000 - ENGAGEMENT & CLIENT SERVICES</td> <td style="text-align: right;">\$981,427</td> <td style="text-align: right;">(\$48,666)</td> <td style="text-align: right;">\$932,762</td> </tr> <tr> <td>CT03000000 - BUSINESS & CREATIVE SERVICES</td> <td style="text-align: right;">\$6,494,220</td> <td style="text-align: right;">(\$321,974)</td> <td style="text-align: right;">\$6,172,246</td> </tr> <tr> <td>CT00000000 - COMMUNICATIONS & CUST EXPR.</td> <td style="text-align: right;">\$16,659,062</td> <td style="text-align: right;">(\$825,259)</td> <td style="text-align: right;">\$15,833,804</td> </tr> </tbody> </table> </div>		Personnel Excluding Attrition	Attrition	Budget Amount	CT01010000 - DIRECTOR'S OFFICE	\$751,641	(\$37,131)	\$714,510	CT01000000 - DIRECTOR'S OFFICE	\$751,641	(\$37,131)	\$714,510	CT02010000 - 311 CONTACT CENTER	\$9,413,202	(\$466,154)	\$8,947,048	CT02000000 - 311 CONTACT CENTER	\$9,413,202	(\$466,154)	\$8,947,048	CT03030000 - DIGITAL COMMUNICATIONS	\$2,311,675	(\$114,509)	\$2,197,166	CT03040000 - DIGITAL MEDIA SERVICES	\$2,038,924	(\$101,186)	\$1,937,739	CT03060000 - CREATIVE & BRANDING SERVICES	\$1,162,194	(\$57,814)	\$1,104,380	CT03090000 - ENGAGEMENT & CLIENT SERVICES	\$981,427	(\$48,666)	\$932,762	CT03000000 - BUSINESS & CREATIVE SERVICES	\$6,494,220	(\$321,974)	\$6,172,246	CT00000000 - COMMUNICATIONS & CUST EXPR.	\$16,659,062	(\$825,259)	\$15,833,804	<p>Rows: ->Department Dimension. If you selected the top level department member, you would see department, division and level 0 members</p> <p>Columns: A: Personnel amounts excluding attrition B: Calculated attrition amounts C: Personnel amounts less attrition. This is the amount budgeted</p>
	Personnel Excluding Attrition	Attrition	Budget Amount																																											
CT01010000 - DIRECTOR'S OFFICE	\$751,641	(\$37,131)	\$714,510																																											
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CT02010000 - 311 CONTACT CENTER	\$9,413,202	(\$466,154)	\$8,947,048																																											
CT02000000 - 311 CONTACT CENTER	\$9,413,202	(\$466,154)	\$8,947,048																																											
CT03030000 - DIGITAL COMMUNICATIONS	\$2,311,675	(\$114,509)	\$2,197,166																																											
CT03040000 - DIGITAL MEDIA SERVICES	\$2,038,924	(\$101,186)	\$1,937,739																																											
CT03060000 - CREATIVE & BRANDING SERVICES	\$1,162,194	(\$57,814)	\$1,104,380																																											
CT03090000 - ENGAGEMENT & CLIENT SERVICES	\$981,427	(\$48,666)	\$932,762																																											
CT03000000 - BUSINESS & CREATIVE SERVICES	\$6,494,220	(\$321,974)	\$6,172,246																																											
CT00000000 - COMMUNICATIONS & CUST EXPR.	\$16,659,062	(\$825,259)	\$15,833,804																																											

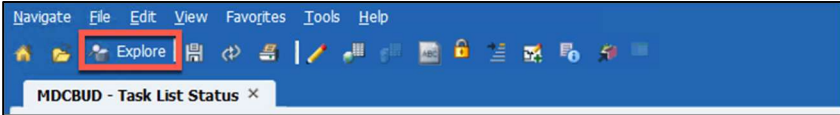

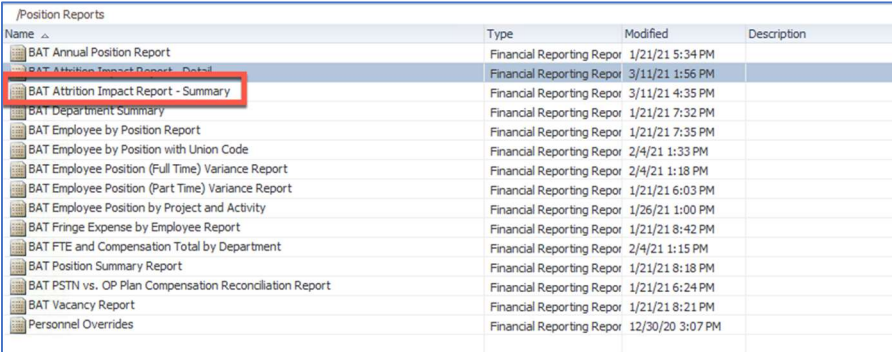
Lesson 15: BAT Attrition Impact Report - Summary

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:

- Navigate to the Position Reports folder
- Run the BAT Attrition Impact Report - Summary

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

5

Verify that the report runs.

	Personnel Excluding Attrition	Attrition	Budget Amount
5001100000 - EMPLOYEE REGULAR	\$11,642,349	(\$582,117)	\$11,060,232
5001220000 - FLEX DOLLARS	\$181,500	(\$9,076)	\$172,425
5001280000 - LONGEVITY PAYMENTS	\$153,891	\$0	\$153,891
5010100000 - SOCIAL SECURITY	\$731,106	(\$36,555)	\$694,551
5010110000 - RETIREMENT	\$1,595,864	(\$69,790)	\$1,526,074
5011100000 - GROUP HEALTH INSURANCE	\$2,310,000	(\$115,500)	\$2,194,500
5011130000 - GROUP LIFE INSURANCE	\$23,808	(\$1,190)	\$22,618
5011130000 - MICA MEDICARE HOSPITAL INS	\$171,045	(\$8,552)	\$162,493
5011140000 - DENTAL PLANS	\$49,500	(\$2,475)	\$47,025
Total	\$16,659,062	(\$825,259)	\$15,833,804

Rows:
->Account Dimension.
The rows will show all of the accounts driven from position and employee data for the selected department

Columns:
A: Personnel amounts excluding attrition
B: Calculated attrition amounts
C: Personnel amounts less attrition. This is the amount budgeted

Module 8: Course Summary

Objectives Achieved 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.

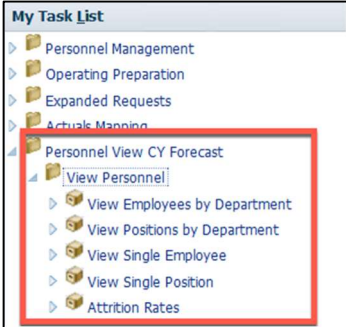
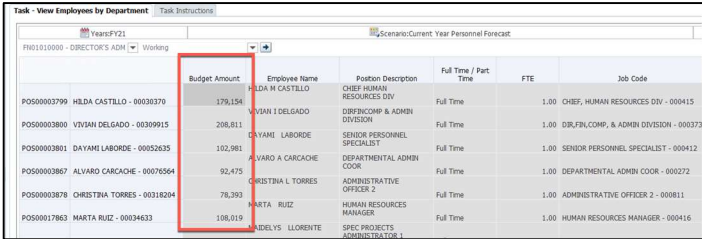
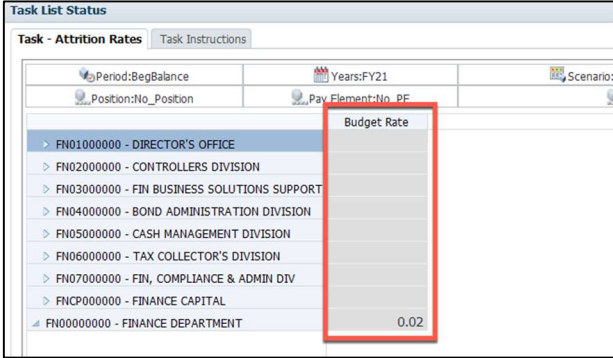
Lesson 1: View Current Year Forecast

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:

- Navigate to the Personnel View CY Forecast folder
- Review the read-only forms within the View Personnel folder

Step	Action	Notes
1	<p>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.</p> 	<p>This form is read-only for department users.</p>
2	<p>Click on the drop-down arrow next to the Department in the point of view (POV) and select a chartfield combination with allocated personnel data. Click the "Go" arrow to save your selection.</p>	<p>This data is recalculated every night based on the latest data from HR.</p>
3	<p>Review the read-only form. The Budget Amount column is the calculated amounts for the employee or vacancy for the remainder of the current year</p> 	<p>OMB manages a form the stores the number of pay periods left in the current year.</p>
4	<p>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</p>	<p>All of the forms in this task list are read-only for department users.</p>
5	<p>Navigate to the Attrition Rates form by going to Personnel View CY Forecast → View Personnel → Attrition Rates.</p>	
6	<p>This form displays the attrition rates set for the current year forecast for your department. Review the attrition rates on the read-only form.</p> 	<p>OMB maintains the current year attrition rates</p>

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.	
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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
Aids** Supplemental training materials will be provided separately

Module 10: Course Summary

Questionnaire Course questionnaire will be provided separately