# HYPERION: SALARY Task List Guide

## Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Notes</td>
<td>3</td>
</tr>
<tr>
<td>Forms</td>
<td>3</td>
</tr>
<tr>
<td>Tab Views</td>
<td>3</td>
</tr>
<tr>
<td>Tasks and the Task List</td>
<td>3</td>
</tr>
<tr>
<td>Home Departments versus Funding Departments</td>
<td>3</td>
</tr>
<tr>
<td>Getting Started</td>
<td>5</td>
</tr>
<tr>
<td>Logging into Hyperion and opening the Salary Application</td>
<td>5</td>
</tr>
<tr>
<td>Navigate to My Task List</td>
<td>6</td>
</tr>
<tr>
<td>Preview</td>
<td>8</td>
</tr>
<tr>
<td>Review department roster for changes needed</td>
<td>8</td>
</tr>
<tr>
<td>Review department funding roster for changes needed</td>
<td>9</td>
</tr>
<tr>
<td>Position Adjustments</td>
<td>11</td>
</tr>
<tr>
<td>Add a position</td>
<td>11</td>
</tr>
<tr>
<td>Change properties of a position</td>
<td>13</td>
</tr>
<tr>
<td>Change benefit choices of a position</td>
<td>14</td>
</tr>
<tr>
<td>Transfer a position to a department within your school</td>
<td>14</td>
</tr>
<tr>
<td>Transfer a position to a department outside of your school</td>
<td>15</td>
</tr>
<tr>
<td>Zero out a position</td>
<td>16</td>
</tr>
<tr>
<td>Employee &amp; Funding Adjustments</td>
<td>18</td>
</tr>
<tr>
<td>Add a percentage increase</td>
<td>18</td>
</tr>
<tr>
<td>Add an employee to a vacant position</td>
<td>18</td>
</tr>
<tr>
<td>Change base pay on a position</td>
<td>19</td>
</tr>
<tr>
<td>Change FTE of employee</td>
<td>20</td>
</tr>
<tr>
<td>Change funding on a position</td>
<td>20</td>
</tr>
<tr>
<td>Delete an employee from a position</td>
<td>22</td>
</tr>
<tr>
<td>Split fund a position</td>
<td>23</td>
</tr>
<tr>
<td>Add Additional Pay to an employee</td>
<td>24</td>
</tr>
<tr>
<td>Change Additional Pay Amount</td>
<td>26</td>
</tr>
<tr>
<td>Delete Additional Pay Amount</td>
<td>26</td>
</tr>
<tr>
<td>Review</td>
<td>27</td>
</tr>
<tr>
<td>Process all updates and changes</td>
<td>27</td>
</tr>
<tr>
<td>Funding review by position</td>
<td>28</td>
</tr>
</tbody>
</table>

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General Notes

Forms
The SALARY application in Hyperion has two main screens or “forms”. Forms are used to review and interact with the data. The primary two forms that you will use to view and interact with SALARY data are forms 1 & 2.

Form 1 contains a higher level look at a position’s details (incumbent, base salary, FTE, health plan, etc.): 

<table>
<thead>
<tr>
<th>Total Pay</th>
<th>FTE</th>
<th>Health Plan</th>
<th>Retire Plan</th>
<th>Life Ins Plan</th>
<th>Job Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>81,402.18</td>
<td>1</td>
<td>Spouse</td>
<td>ORP_OP</td>
<td>Yes</td>
<td>900295 - Assoc Professor 9 Mo SAL</td>
</tr>
</tbody>
</table>

Form 2 contains more information on funding sources and types (funding distributions, rate, fringe, etc.):

<table>
<thead>
<tr>
<th>Employee</th>
<th>Base Salary</th>
<th>Dist %</th>
<th>Rate per Funding Dist%</th>
<th>Health Benefit Expense</th>
<th>Life Insurance Expense</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pan, Peter</td>
<td>81,402.18</td>
<td>100</td>
<td>81,402.18</td>
<td>8,936.4</td>
<td>42.06</td>
</tr>
</tbody>
</table>

Tab Views
Each form has 3 tab views: Combined, Faculty, and Support. The “Combined” tab shows all faculty and support positions together in one view. The remaining two tabs – Faculty and Support – show exclusively faculty or support positions.

Tasks and the Task List
“Tasks” are used to organize the various ways you may use the SALARY application for budgeting your positions. The “Task List” order is not linear. For instance, you may “Add a position” and then jump to “Split fund a position” to change the way the position you created is funded.

Rather than thinking about your SALARY Task List as a linear order of tasks, think of it more like a list of tools you can use in the position budgeting process.

Home Departments versus Funding Departments
In the SALARY application, you will notice the letters “HD” in front of the department ID that you are reviewing. The letters “HD” stand for “Home Department”.

Home Departments, not funding departments, are used to control access to view/adjust data. This is because, while a position may be funded by a particular department, the position may belong to another department. Therefore, positions are listed by their Home Departments rather than their funding departments.

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For instance, a position may be funded 100% by department 075006 but since the position’s Home Department is 075000, that position will only show up when searching 075000 (not 075006).

If you have any general questions about the SALARY application, please contact Gail Friedrich (gfriedri@admin.fsu.edu or 644-4245) at the Budget Office.
Getting Started

Logging into Hyperion and opening the Salary Application

1. Using a compatible internet browser, navigate to the My.FSU.edu portal (https://www.my.fsu.edu/). Use your OMNI login credentials to logon. Under the Faculty & Staff tab, on the left hand side, you should see a button for Hyperion Budgeting:

![Hyperion Budgeting Button]

2. Once again use your OMNI login credentials to login to Hyperion:

![Hyperion Login Screen]

3. Once you have logged on, you can open the SALARY application multiple ways:
   a. From the menu list: Navigation → Applications → Planning → SALARY.
b. From the Quick Links menu:

![Quick Links Menu]

![Recently Opened Menu]

c. And, if you’ve recently opened the SALARY application, from the Recently Opened menu:

**Navigate to My Task List**

Navigate to the tasks designed to help you review, prepare, and submit changes for your unit’s position budget for the operating budget.

1. Once you have opened the SALARY application, you will see My Task List on the left hand side.
2. Tasks are grouped together based on type. Click the arrow to the left of a group to expand and see each task. Click on the task name to open it.

![Task List with Review Department Roster for Changes Needed highlighted](image1.png)

3. Once you’ve selected the task, it should be displayed in the panel on the right. You are now ready to interact with the task.

![Task List Status with Review Department Roster for Changes Needed](image2.png)
Preview

Review department roster for changes needed

1. Click on the Home Department drop down arrow and type the department number you want to work with.

2. Click the Go arrow ( ) to pull up all the positions and incumbents assigned to that department.
3. Review for accuracy and changes needed for next fiscal year.

**Review department funding roster for changes needed**

1. Click on the Home Department drop down arrow and type the department number you want to work with.

2. Click the Go arrow ( ) to pull up all the positions, incumbents, and their funding assigned to that department.
3. Review for accuracy and changes needed for next fiscal year.
Position Adjustments

Add a position

1. Right click on a position number.
2. Choose Add a position from the drop down menu.

3. Make choices in the fields associated with the new position:
   a. Select new position – Click member selector icon ( ) on the right, choose Total New Positions, and add a New Position to the right hand box. Select a new position based on whether it is Faculty or Staff. Click OK
b. Select employee – Similar to the previous step, click the member selector icon ( ), and choose "To be Hired" if employee is not currently in the system, choose E000000000 for a vacant placeholder, or choose an existing employee from the list by Empl ID. Add to the right hand box. Click OK.

c. Enter FTE (range is 0-1)

d. Select funding department - click on the member selector icon ( ) to the right, enter department, click magnifying glass ( ), choose department in left box and move to the right box with the blue arrow ( ). Click OK.

e. Select fund - click on the member selector icon ( ) to the right, enter fund, click magnifying glass ( ), choose fund in left box and move to the right box with the blue arrow ( ). Click OK.

f. Enter base salary (prorated for FTE)

g. Enter distribution percentage for funding

h. Select Admin Code (if any)

i. Enter budgeted weeks (max 52.2)

j. Select health insurance plan

k. Select job code - choose from drop down menu

l. Select life insurance option - choose yes or no from drop down menu

m. Select Pay Grade

n. Select Rank

o. Select retirement plan - choose from drop down menu (Faculty & A&P - ORP_OP; USPS - FRS_HA)

p. Enter salary admin plan - choose from drop down menu

q. Select Union Code - choose from drop down menu

4. Click Add Position.
Change properties of a position

1. Once you have added a new employee or if an existing employee needs updating, right click on the associated position number, and select Change position properties.

2. Select the property to change, make the change on the prompt screen, and click Change <Property> (where <Property> is the job code, union code, admin code, etc., depending on which right click option you selected.)

3. Or you can change the non-greyed out properties of the position directly on this form by choosing from the drop down list in each box.
4. If you make changes directly on the form, Person Year will calculate after you enter budgeted weeks and save
5. Once finished, click Save (젠) on the Tool Bar

Change benefit choices of a position

1. Once you have added an employee to a position or if an existing employee needs updating, you can change their benefit choices (Health, Life Ins, or Retirement) by right clicking on the employee and clicking the drop down arrow next to: Change benefit choices.

2. Choose to change Health, Life Insurance, Retirement, or ALL three
3. In the prompt screen, choose from the drop down list
4. Click Change <benefit plan> and continue

Transfer a position to a department within your school

1. Right click on the position number you wish to transfer.
2. Choose Transfer a position within a school from the drop down menu.

3. On the prompt screen, DO NOT CHANGE the current Home Department
4. On the “Select new Home Department”, click on the member selector icon (%) on the right.
5. On the new prompt window enter the department number in the search field and click on the magnifying glass.
6. Choose this new number and move to the right hand box by clicking the blue arrow.
7. Click OK.

8. Back on the previous screen, enter a comment if needed and click Transfer Position to complete the transfer.

9. Be sure to change the funding on the position you just transferred by completing the task, Change funding on a position.

Transfer a position to a department outside of your school

1. Right click on the position number you wish to transfer.
2. Choose Transfer a position outside of a school from the drop down menu.

3. You will get a warning that if you proceed you are giving up control of the position to the Budget Office. Click OK.

4. On the prompt screen enter a comment for the Budget Office and select a new home department from the drop down.
5. Click Transfer Position.

6. The position is then transferred to a place holder and the Budget Office will have to perform the rest of the transfer.
7. Be sure to notify the department you are transferring the position to so they can update the funding to their department using the task, Change funding on a position.

**Zero out a position**

1. Right click on the position number of the position you wish to zero out.
2. Choose Zero Out Position from the drop down menu
3. You will receive a Launch Confirmation Message asking if you are sure you want to zero out this position
4. Select OK or Cancel
5. You will receive notification that the task was successful and the position has been zeroed out.
6. **OPTIONAL**: This right-click function leaves any incumbent in place. If you wish to remove an incumbent and make the position vacant as well, please refer to the task, *Delete an employee from a position.*
Employee & Funding Adjustments

Add a percentage increase

1. To enter a percentage increase, right click on Pay Type and choose Percentage Increase.

2. You can choose to enter a percentage increase for one employee or enter an across the board percentage increase for the whole Home Department you are working with. You may also want to select either the Faculty or Staff tabs to limit the number of employees will be impacted by this task.

3. After choosing Percentage Increase by Employee or Percentage Increase by Home Department you will receive a Launch Confirmation Message to add this percentage increase. Choose OK or Cancel.

4. Enter percent to increase the base salary (ex: 1.5 = 1.5%)

5. Click Add Increase

Add an employee to a vacant position

1. If a position is currently vacant, right click on the employee ID "000000000 - Vacant" to the right of the position you wish to add an employee to.

2. Choose Add an employee to a vacant position from the drop down menu.

3. Select employee - click on the member selector icon (％) to the right and a new screen is opened
4. Enter Empl ID and click on the magnifying glass ( ), choose the employee in the box on the left and move to the right with the blue arrow ( ).
5. Or click the arrow sign next to Existing Employees and choose from the drop down
6. Click OK and return to the previous screen

7. Click Add Employee.

8. If position is currently filled but you want to replace with a different employee, first the employee must be deleted from the position using the task, Delete an employee from a position, then follow the steps above.
9. If properties of the position need to be changed, use the task, Change properties of a position or change properties with the drop down list on cells that are white (grey cells cannot be changed this way).
10. In order to compute accurate benefits, be sure to follow up with the task, Change benefit choices of a position.

Change base pay on a position

1. To change the base salary of a position, right click on the Pay Type and choose Change base pay amount on the drop down menu.

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2. Enter amount
3. Click *Change Base Pay*

![Change FTE of employee]

**Change FTE of employee**

1. Right click on the employee you wish to adjust FTE for and choose *Change FTE of an employee.*

2. Enter FTE (range is 0 to 1)
3. Click *Change FTE*

![Change FTE of an employee]

4. Base salary does not automatically adjust with FTE changes. Be sure to change base pay if necessary using the task, *Change base pay on a position.*

**Change funding on a position**

1. **First,** you must add the new funding source to the position by right clicking on the **Pay Type** of the employee you wish to adjust funding for.
2. Choose *Add new funding source.*
3. Select funding department by clicking on the member selector icon (>>) to the right. Type in the Dept ID and click on the magnifying glass (🔍) to the right. Click on the Dept ID in the table on the left and move to the right box with the blue arrow (ブル). Click OK.

4. Enter the Distribution percentage (range is 0 to 100)
5. Select Fund by clicking on the member selector icon (>>) to the right. Type in the Fund and click on the magnifying glass (🔍) to the right. Click on the Fund in the table on the left and move to the right box with the blue arrow (ブル). Click OK.
6. Select Pay Type. Choose "Base Pay" or "Additional Pay"
7. Click Add Funding
8. **Second**, make sure the Base Pay is displaying the correct amount.
9. If adjustments need to be made, right click on the Pay Type of the amount to be changed and choose *Change base pay*.
10. Enter the correct amount and click *Change Base Pay*.
11. **Third**, you must delete the current funding row by right clicking on the Pay Type with the funding you wish to delete
12. Choose *Delete funding source*
13. You will receive a message that the funding source has been deleted

### Delete an employee from a position

1. Right click on the **employee** you wish to delete. Choose *Delete an employee* from the drop down menu

2. You will receive a Launch Confirmation Message asking if you are sure you want to delete this employee

3. Select *OK* or *Cancel*
4. A place holder employee ID (“000000000 – Vacant”) is now in the position
Split fund a position

1. Right click on the **Pay Type** of the employee you wish to split fund.
2. Choose *Add new funding source*.

<table>
<thead>
<tr>
<th>Base Salary</th>
<th>Dist %</th>
<th>Rate per Fund</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Pay</td>
<td>20,880</td>
<td>100</td>
</tr>
</tbody>
</table>

3. Select funding department by clicking on the member selector icon (�新) to the right. Type in the Dept ID and click on the magnifying glass (新) to the right. Click on the Dept ID in the table on the left and import it to the table on the right. Click **OK**.

4. Enter the Distribution percentage (range is 0 to 100)
5. Select Fund by clicking on the member selector icon (�新) to the right. Type in the Fund and click on the magnifying glass (新) to the right. Click on the Fund in the table on the left and import it to the table on the right. Click **OK**.
6. Select Pay Type. Choose "Base Pay" or "Additional Pay"
7. Click **Add Funding**.
8. Now right click on the Pay Type of the existing funding source and choose *Change existing funding distribution* from the drop down.

9. Enter the new funding distribution percentage.
10. Click *Change Distribution*.

Add Additional Pay to an employee

1. **First**, right click on the Pay Type of the employee you wish to add an Additional Pay to
2. Choose *Add new funding source*.
3. Select funding department by clicking on the member selector icon ( ) to the right. Type in the Dept ID and click on the magnifying glass ( ) to the right. Click on the Dept ID in the table on the left and import it to the table on the right. Click OK.

4. Enter the Distribution percentage (range is 0 to 100)

5. Select Fund by clicking on the member selector icon ( ) to the right. Type in the Fund and click on the magnifying glass ( ) to the right. Click on the Fund in the table on the left and import it to the table on the right. Click OK.

6. Select Pay Type by clicking on the member selector icon ( ) to the right. Type in the 3 letter Additional Pay type (e.g., ADS, SF1, SF5, SFN) and click on the magnifying glass ( ) or click the arrow sign next to "Additional Pay" and then choose the type of additional pay. Move your choice from the box on the left to the box on the right. Click OK.

**NOTE:** If you choose SF1 or SF5, the amount will be automatically calculated for you. If you choose ADS, you will need to adjust for the amount (see step #8).

7. Click Add Funding
8. **Second**, once you see the new additional pay, right click on the employee's Pay Type and choose *Change additional pay amount*. *(NOTE: This step is not necessary if you selected SF1 or SF5 in step 6. The amount will be calculated for you for SF1 or SF5.)*

9. Type in the Base Salary of the Additional Pay

10. Click *Change Additional Pay*

![Change Additional Pay Amount](image)

**Change Additional Pay Amount**

1. To change the Additional Pay amount on the position, right click on the Pay Type of the 3 letter Additional Pay name (ADS) and choose *Change additional pay amount*. *(NOTE: This task only applies to ADS additional pays. For SF1 and SF5, these amounts are calculated automatically as 10% or 5%, respectively.)*

![Change Additional Pay Amount](image)

2. Enter the Base Salary of the Additional Pay

3. Click *Change Additional Pay*

![Change Additional Pay Amount](image)

**Delete Additional Pay from position**

1. To delete an existing additional pay from a position, right click on the **Pay Type** of the 3 letter Additional Pay name (ADS, SF1, SF5, SFN).

2. Choose *Delete additional pay from a position.*
3. You will receive a Launch Confirmation Message asking if you want to delete supplemental pay. Click OK or Cancel.
4. You will receive a message when deletion is complete.

Review

Process all updates and changes

1. You must run this business rule every time you make changes to aggregate those changes throughout the system if you want to review them right away on the Funding review screens within Hyperion. If not, these aggregations will be performed systematically twice a day during the budget cycle.
2. Click Launch.

3. Enter Division, School, Area, or Home Department you wish to aggregate changes for by clicking on the member selector icon ( ) to the right. Drill down to the level you wish to use, click on it in the table on the left and import it to the table on the right. Click OK.
4. Click *Launch* again.

**Funding review by position**

1. Click on the Home Department drop down and type the department number you want to work with.
2. Click the Go arrow ( ) to pull up the funding detail by position number to review changes you have made.

**Funding review by employee**

1. Click on the Home Department drop down and type the department number you want to work with.

2. Click the Go arrow ( ) to pull up the funding detail by employee to review changes you have made.

**Funding review totals prompts**

1. On the Home Department drop down, choose the home department number you wish to review.
2. Click on the Fund drop down and choose the fund you want to review.
3. Now click on the department funding entity you wish to review.
4. Click the Go arrow ( ).
5. This will pull up the funding detail with totals to review changes you have made.
6. If you want to review in Excel, go to Tools on the tool bar and choose Export as Spreadsheet.

7. In Excel you can now do sorts, filters, and Pivot Tables to balance to your control totals by Faculty, A&P, and USPS.
8. Compare your E&G rate totals to your E&G allocation totals and make adjustments where necessary.