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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, employee record, total pay, FTE, health plan, etc.):

![Form 1 Screenshot]

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

![Form 2 Screenshot]

Tab Views
Each form has three 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 only faculty or support positions, respectively.

![Tab Views Screenshot]

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, regard it as 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 vs Funding Departments Screenshot]

Home Departments, not funding departments, are used to control access to view/adjust data. While a particular department may fund a position, the position “belongs” to the designated home department. Therefore, positions are listed by their Home Departments rather than their funding departments.
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 credentials to log in. Under the Faculty & Staff tab, on the left-hand side, you should see an icon for Hyperion Budgeting (labeled “HYP”). Click the “HYP” icon to sign-in to Hyperion.

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

![My Task List](image)

2. Tasks are grouped 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.
3. Once you’ve selected the task, it displays in the panel on the right. You are now able to view and interact with the data.
Review department roster for changes needed

1. Click on the Home Department drop-down arrow and type the home department number you want.

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

Review department funding roster for changes needed

1. Click on the Home Department drop-down arrow and type the home department number you want.

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

Add a position

1. Right-click on any position number. (NOTE: For this task, which position number you right-click is not important. The right-click menu is contextual based on what column you are right-clicking in.)
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 1” if the 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 the employee record. If the position is vacant or To Be Hired, leave this blank.

d. Enter the FTE (range is 0-1).

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

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

g. Enter the base salary (prorated for FTE).

h. Enter the distribution percentage for funding on the funding department listed in step “e” (above). If the position needs to be split funded, you’ll need to add another funding source after you’ve added the new position.

i. Select an Admin Code (if any).

j. Enter the budgeted weeks. (Typical values: 9mo faculty = 39.0, 10mo faculty = 43.4, and 12mo faculty/staff = 52.2)

k. Select a health insurance plan. (If unknown, you can use an average of the Individual and Family plans.)

l. Select a job code from the drop-down menu.

m. Select a life insurance option. Choose yes or no from the drop-down menu.

n. Select a Pay Grade.

o. Select a Rank.

p. Select a retirement plan. Choose from the drop-down menu. (Typical values: Faculty & A&P = ORP_OP, USPS = FRS_HA)

q. Enter the salary admin plan (Faculty = 22, A&P = 21 or 24, USPS = 23). Choose from the drop-down menu.

r. Select a Union Code. Choose from the 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 ( ) 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 (ıy) 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.

![Transfer a position outside a school](image)

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

![Launch Confirmation Message](image)

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**.

![Runtime Prompts - Transfer a position outside a school](image)

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*. 

![Image of zero out position option in a software interface](image-url)
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 that 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 the position is currently filled, but you want to replace it 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. 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.
2. Enter the base salary amount (prorated for FTE).
3. Click *Change Base Pay*.

![Change Base Pay](image)

**Change FTE of employee**

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

![Change FTE](image)

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

![Change FTE](image)

4. The base salary does not automatically adjust to 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 the 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-hand box and move to the right-hand box with the blue arrow (▷). 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 (▷). 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 are needed, 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 is 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*.

3. Select the 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-hand side and import it to the table on the right-hand side. 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. 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 the 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 three-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 either SF1 or SF5.)

9. Type in the Base Salary of the Additional Pay.

10. Click *Change Additional Pay*.

![Runtime Prompts - 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 three-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*.

![Runtime Prompts - 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 three-letter Additional Pay name (ADS, SF1, SF5, SFN).

2. Choose *Delete additional pay from a position.*

![Delete additional pay from a position](image)
You will receive a Launch Confirmation Message asking if you want to delete supplemental pay. Click OK or Cancel.

You will receive a message when the 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 twice a day systematically 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 home department number.
2. Click the Go arrow ( ) to pull up the funding detail by position number to review the changes you have made.

Funding review by employee

1. Click on the Home Department drop down and type the home department.

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 the changes you have made.
6. If you want to review in Excel, go to Tools on the toolbar 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.