

Understanding HR Peoplesoft and Hyperion McMaster University

The purpose of this document is to provide an overview of how the HR Peoplesoft Module and the Hyperion Budgeting System interact. It is intended to provide information that will assist users with both their HR operational functions and their budgeting functions. This document is intended to be a summary of key aspects as at the date noted below and will be updated as the modules evolve.

Overview of How HR Data is Stored in the HR Peoplesoft Module

1. How are positions set up with combo codes?
 - Positions are created by the HR Service Center Reporting and Control team and there is no field (place) on the position to add a combo code in the HR Peoplesoft module.
 - At the time the employee is hired, there is a job data record created and the employee is linked to the position.
 - The combo code is then added to the department budget table and it is then linked to the position or employee/appointment as applicable. The position or appointment is linked to the applicable department in this table.

2. When the Faculties/departments submit HR paperwork, where does HR load the combo codes (chartfields) in the Peoplesoft HR module?
 - In the HR Peoplesoft module all combo codes are entered on the Department Budget Table (DBT) – there are various levels on the DBT but all combo codes are entered in that one table

For example if you search a department in the DBT, it will show:

- all default accounts, and
 - all combo codes set up for positions within the department (Position Level), and
 - all employees with combo codes directly attached to one of their employment instances (Appointment Level).
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- The DBT will apply the combo code as follows to each employee (by priority):
 - If an Appointment Level exists then the Appointment combo code applies.
 - If there is no Appointment Level, then the Position Level combo code applies.
 - If there is no Appointment Level or Position Level, then the Default combo code set up for the Department applies.

The system will not apply two levels of funding (mutually exclusive and the system applies the above noted logic to determine priority). This priority also determines the combo code included in the HR Master Data file loaded into Hyperion.

3. How are employees linked to positions?

- The only point where the combo code is linked directly to an employee is at the Appointment Level.
- An employee can have multiple Appointment Level combo codes (e.g. 2 temporary positions).
- Multiple employees on one position (charged to the same combo code) are likely set up with a Position Level combo code eg. a multi-incumbent role in a single department.

Overview of How HR Data Flows to Hyperion

Note: The information sent from Peoplesoft HR to Hyperion and to the Finance Module (general ledger) for completed months is the same.

Part 1: Hyperion receives HR Master Data from HR Peoplesoft which is used to forecast the budgets

- The data sent from HR in the Master Data file is core information such as hourly rate, current standard hours (not hours associated with stipends/premiums), employee groups, combo codes, etc. Combo codes are fed from the DBT in the same priority as used for the actual pay, e.g. Appointment Level if it exists, otherwise Position Level if it exists, otherwise Department Default.
- At present, Master Data is loaded twice a year when budgets are pre-populated (fall and summer).
- With the current Hyperion functionality, the Master Data cannot be changed once the budgeting process starts as it is the foundation for the forecasting.
- In the Hyperion system, users can make changes to end dates and hourly rates, but changes cannot be made to combo codes, steps/grades or bands. Any changes made in the Hyperion budgeting system do not flow back to the HR Peoplesoft module. If a planner wishes to make changes to the data in the HR Peoplesoft module, the request should be submitted on the appropriate HR Event form. Once the HR Peoplesoft module is updated, the changes will not flow through to the Hyperion budgeting system until the next Master Data load.
- In the future, Hyperion will have functionality to load an “adjusted budget” every month, in essence loading the Master Data file but in a different place in the Hyperion system. In the upcoming months, Budgeting Services will provide additional details regarding this functionality

Part 2: Hyperion receives Actual HR Pay Data (Actuals) to compare against the forecast

- Actuals are loaded every month after the finance month-end closes.
- A new report similar to the Labour Distribution report is available in Hyperion (2.2.12 under Forms). This report will verify what is loaded into Hyperion as actuals by employee.
- Retroactive payments and one time payments are included in the Actuals sent to Hyperion. , As a result of the nature of these payments, it is unlikely these payments have been included in the Master Data file based on the current configuration.

Helpful Hints

- Hyperion is for budgeting purposes and in many cases it is an estimate of the main pay transactions.
- Hyperion is not designed to handle inconsistent HR or pay items. Therefore, if an exception or one-time payment is processed, it will not be part of the Hyperion Master Data (but may be sent over on the actuals).
- It is recommended that users monitor stipend end dates/amounts and check the data used in Hyperion as these details often vary and the Actuals may change throughout the budgeting year.
- Timesheets (entered by employees or department time administrators)
 - A combo code can be entered on the timesheet for a specific employee for specific hours/day however this will not be captured on the HR Master Data file
 - If entered on the time sheet that combo code will be charged for the specific hours associated with that time entry (the benefits will not be directed based on this manual entry)
 - If no combo code is entered on the timesheet it will default to the DBT.
 - **Combo code entry on time sheets is not recommended** by HR as positions must be set up correctly to ensure the appropriate approvals, the appropriate allocation of benefit charges, accurate information in the Hyperion Master Data, and because combo code entry on timesheets impact the performance of the system.
- Teaching Assistants (TA)
 - TA information is sent to Hyperion based on the stipend and current standard hours show as 1. Actual hours for a TA are 33.26 per month, or 266 for a full TA. (See below for “Issues Currently Being Reviewed”).
 - If TA paperwork is not received and entered before the Master Data file is sent to Hyperion then only the actuals will show and no hours will be forecasted.
- Temporary employees (should be less than 1 year by definition) will show as less than a full FTE in Hyperion as there are no hours attached to statutory holidays in HR Peoplesoft.
- An Employee who is in HR Peoplesoft and at the time of the Master Data feed is not on a position in an operating/ancillary budget (e.g. Fund codes other than 20, 30 and 45; external business unit like RMA or Divinity) will not feed to Hyperion. If that same employee later accepts a secondary position that is included in an operating/ancillary budget (eg. a part-time Unifor position), the employee’s information will not be in the projections. The actuals from the eligible position will feed into Hyperion. Manual intervention will be required by the Hyperion user to create a forecast. Please note there are numerous employees with multiple positions at McMaster.

- When Faculties and departments are sent the contract end date reports from the HR Service Center it is critical these reports are completed and returned in a timely manner to ensure the data feeding into Hyperion is current and correct.
- The department code for HR purposes and for combo code purposes can be different. Specifically, the employee can be in one department from a position perspective but the funding (combo code) is from a different department. It is important to note the difference between the chartfield department imbedded in the combo code (funding purposes) versus the HR department for HR purposes (department for position and hierarchy purposes). In the majority of cases it will be the same.
 - The department imbedded in the combo code determines where salaries and benefits will be charged to in the GL, and where an employee will appear in the Hyperion budgeting module.
 - The department for HR purposes determines where an employee appears in the Hyperion salary administration module for annual merit increases for example.
- The default account (invalid/default) will be charged:
 - If there is no Appointment Level or Position Level account in the DBT (administrative error),
 - If the combo code might not be open yet (not synced to HR from finance yet) so default is charged.
 - If the employee is hired onto an existing position that already has a default account set up (no Appointment Level or Position Level account).
 - Please refer to the HR presentation/document to understand how combo codes are setup in the HR Peoplesoft module - [http://www.mcmaster.ca/bms/pdf/HR Payroll %20Nov%2024%20Final.pdf](http://www.mcmaster.ca/bms/pdf/HR_Payroll_%20Nov%2024%20Final.pdf)
- The HR Peoplesoft module feeds two types of hours to Hyperion from the position for each employee – standard hours and current standard hours:
 - Standard hours are the full-time hours for the position to be used in calculating FTE, i.e. 35, 37½ or 40 hours/week.
 - Current standard hours are based on the employee’s schedule on the Job. In Hyperion, if the schedule shows as “1” it is likely a temporary employee not on a set schedule, or a stipend or premium based paid employee.
- Users are able to run the below report in the HR Peoplesoft module to view the combo code overrides at the appointment level: Set up HCM/Product Related/Commitment Accounting/Budget Info/DBT Dept Queries – “All Active Benefit Combo Setup” and “All Active Earns Combo Setup” queries This report provides an overview of all individual overrides set up on employees in the HR department.

Next Steps

- The HR Service Center in conjunction with Budgeting Services will endeavor to send out reminders 30-60 days before the Master Data upload to provide advance notice should a user wish to submit any corrections to be entered into the HR Peoplesoft Module.
- Continued attention to contract end date reports and other error reports provided to Faculties and departments is critical and the HR Service Center will begin copying the applicable Director of Financial Administration when forwarding to the department administrators. The HR Service Center is committed to entering any changes submitted to HR by the applicable deadlines.
- Budgeting Services and the HR Service Center will be holding training sessions to address questions or specific issues on these topics. Watch the portal for dates and communication will be sent to Hyperion users also.
- An audit of existing accounts based on the current data in the HR Master Data file was completed and adjustments to correct structural combo code usage will be complete for the beginning of the 2016-17 fiscal year. For example, where a salary might be charged to a benefit account, where an employee with an end date might be charged to the full-time combo code rather than part-time and where the department default is currently in place and the appropriate compensation group default such as TMG or Unifor or Faculty could be utilized.
- After the current budget cycle is complete in early May, the HR Master Data as of that date will be loaded into Hyperion. This data will not be used for an official forecast, but will provide departments the opportunity to preview their data and make the required corrections to the HR Peoplesoft module before the load for the first forecast.
- Hours fed from the HR Peoplesoft module to Hyperion will not be accurate for calculating FTEs (for 2015/16, due to issues at the beginning of the year). A file will be distributed to departments in May to provide the correct data on hours worked, employees, and accounts. It is important to ensure that FTEs used in the budget model calculations are accurate.
- In addition, work continues on the below identified potential technical issues:
 - Additional pay (stipends or premiums) are processed bi-weekly in HR Peoplesoft and show in Hyperion as a monthly amount. *This will be corrected with the June 2016 pre-population.*
 - The standard hours for a Teaching Assistant of 33.26 from the position is being sent to Hyperion, however in Hyperion it is showing as 1 hour. *This is being reviewed by Budgeting Services.*

- Sessional Faculty and the additional pay records and accounts are under review as there appears to be inconsistencies. *This is being reviewed by the HR Service Center.*
- The HR Event form is currently being revised to ensure the HR department is a mandatory field. *This is being reviewed by the HR Service Center.*

Questions:

Contact the HR Service Center at: (905) 525-9140 extension 22247

The HR contact list by department is at <http://www.workingatmcmaster.ca/contacts/index.php>

or

Contact your Budgeting Services representative:

Iain Clarkson	Ext. 21960 or iclarks@mcmaster.ca
Paola Morrone	Ext. 23934 or morronep@mcmaster.ca
Chris Sylvester	Ext. 24766 or sylvest@mcmaster.ca
Lou Mitton	Ext. 24316 or mittonl@mcmaster.ca

Please note that the Faculty of Health Sciences HR office manages this information in the HR system for FHS departments and may have a different approach from the one outlined above. It is recommended you contact your FHS-HR office for further details of how to correctly enter HR data and combo codes.