

Smart View for Planning

Exercise 4: Working with HCP Forms


In this exercise, you will create a new distribution for an existing employee from the Manage Existing Employees and Job Codes form in HCP.

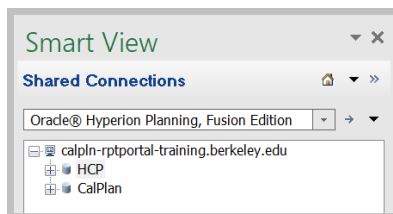


For the training, you should be working in the Training environment. If you have switched back to Production since Exercise 1, you'll need to disconnect from the server and return to Training. To disconnect, go to the Panel and click the drop-down arrow next to the house button and select Disconnect All.

To connect to Training, go to the Smart View ribbon, select the Options button, select Advanced from the left panel, and enter the following in the Shared Connections URL text box:

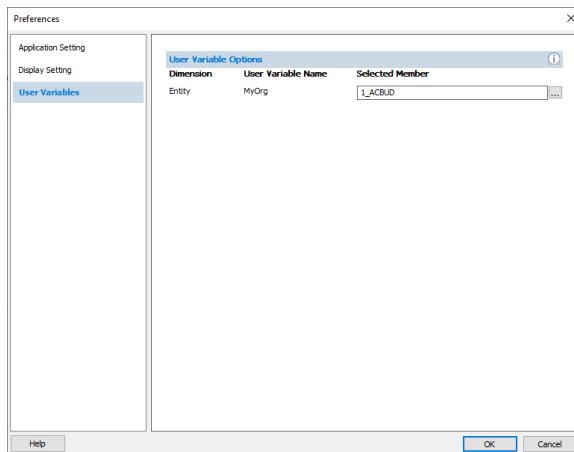
<https://calpln-rptportal-training.berkeley.edu/workspace/SmartViewProviders>

1. From the Smart View ribbon, select the Panel button
2. Click the down arrow next to the House button in the Task List  and select Disconnect All
3. Click the down arrow next to the House button in the Task List and select Shared Connections
4. Enter your Training ID and Password
5. Select Oracle® Hyperion Planning, Fusion Edition from the drop-down list
6. Expand the tree so that HCP is visible

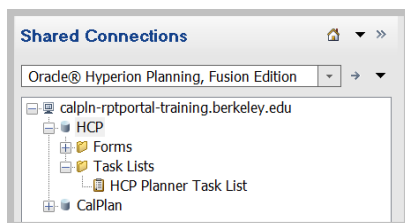


7. Right-click on HCP and select Connect
8. Right-click on HCP and select User Preferences
9. Select User Variables in the left panel and then enter a DeptID or L6 or L5 entity in the text box on the right. If you don't know the code for the entity, you can click the Member Selection button to open the dialog box and select the entity that way

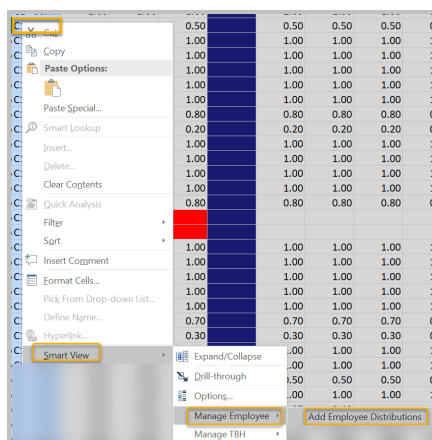
Smart View for Planning



10. Select OK to accept the selected entity and close the dialog box
11. Expand the tree under HCP so that HCP Planner Task List is visible



12. Double-click HCP Planner Task List to display the HCP forms
13. Double-click **1. Manage Existing Employees and Job Codes** and wait patiently while the data is being fetched.
14. When the Manage Existing Employees and Job Codes form loads, go to the Distributions tab.
15. Right-click on the name of an employee who has a single distribution and select Smart View \ Manage Employee \ Add Employee Distributions to open the Launch Business Rule dialog box

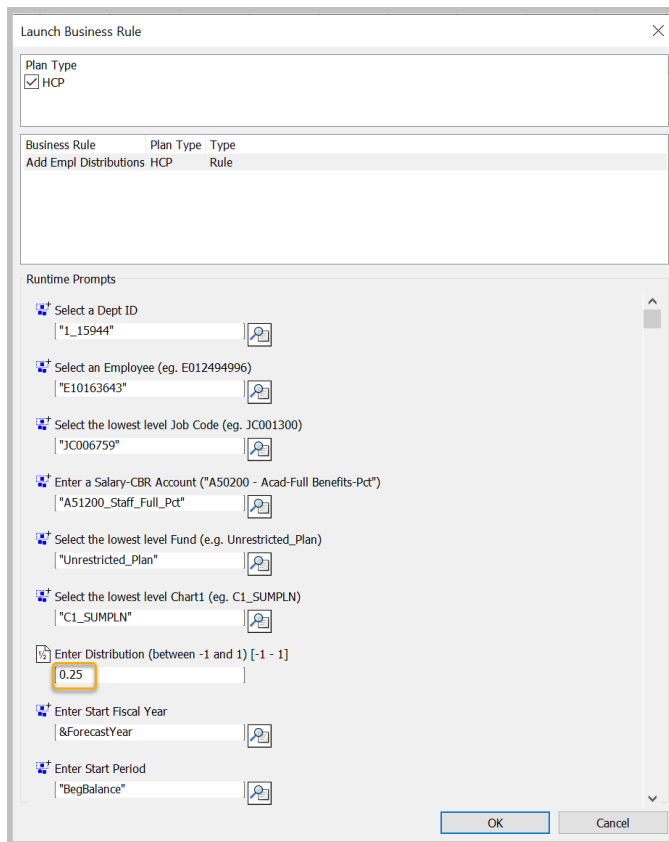


16. Confirm that the Dept ID, Employee ID, and Job Code are for the intended employee
17. Select the Member Selection button for Fund and select a different fund than what is currently selected

Continued on the next page

Smart View for Planning

18. Enter 0.25 for the Distribution



The "Launch Business Rule" dialog box is shown. It has a "Plan Type" section with "HCP" selected. Below is a table with columns "Business Rule", "Plan Type", and "Type". The table contains one row: "Add Empl Distributions", "HCP", and "Rule". The "Runtime Prompts" section contains several prompts with input fields and search icons:

- Select a Dept ID: "1_15944"
- Select an Employee (eg. E012494996): "E10163643"
- Select the lowest level Job Code (eg. JC001300): "JC006759"
- Enter a Salary-CBR Account ("A50200 - Acad-Full Benefits-Pct"): "A51200_Staff_Full_Pct"
- Select the lowest level Fund (e.g. Unrestricted_Plan): "Unrestricted_Plan"
- Select the lowest level Chart1 (eg. C1_SUMPLN): "C1_SUMPLN"
- Enter Distribution (between -1 and 1) [-1 - 1]: "0.25" (highlighted with a yellow box)
- Enter Start Fiscal Year: "&ForecastYear"
- Enter Start Period: "BegBalance"

At the bottom are "OK" and "Cancel" buttons.

19. Since the start and end month/year are acceptable, select OK to complete the dialog box.

20. HCP will build the new distribution and refresh the screen. Now you can modify the initial distribution, reducing it by 0.25, so that the total distribution for the employee remains the same.

End of exercise