

CalPlanning Getting Started Guide

Welcome

Congratulations! You now have access to CalPlanning, UC Berkeley's financial planning and analysis tool. In CalPlanning you can:

1. Create Operating Budgets and update Forecasts for your unit
2. Run financial reports to review and analyze Budget and Actuals data

Learning More about CalPlanning

To learn more about CalPlanning, please visit the [CalPlanning website](#) which includes information about:

- Training and Job Aids
- Contact Information
 - Help Desk
 - Unit support
- CalPlanning availability
- Scheduled updates
- News and alerts
- Monthly release notes

CalPlanning Tools

Planning Applications	Reporting Databases	Reporting Applications
<ul style="list-style-type: none"> • CalPlan • Human Capital Planning (HCP) 	<ul style="list-style-type: none"> • CalRptg • HCPRptg • CalPlan 	<ul style="list-style-type: none"> • Web-based templates to generate reports • Smart View Excel interface to create ad hoc custom reports

CalPlanning Roles

Your role is assigned by your Divisional Finance Leader (DFL) and determines the access you have to the different CalPlanning tools.

Role, Access and Capabilities	CalPlan	HCP	CalRptg	HCPRptg
Planners may input unit financial plans into our planning tools CalPlan and Human Capital Planning (HCP). They can run and analyze canned reports in CalRptg and HCPRptg. In addition to these web-based tools, Planners can utilize Smart View in MS Excel for data entry into CalPlan and HCP as well as create ad hoc queries of plan and actual data from the CalRptg, CalPlan, and HCPRptg data cubes.	X	X	X	X
HCPRptg Reporters can generate reports from the CalRptg and HCPRptg data cubes with the templates available on the web interface or create ad hoc queries for custom designed reports using the Smart View Excel interface.			X	X
CalRptg Reporters can generate reports from the CalRptg data cube with the templates available on the web interface or create ad hoc queries for custom designed reports using the Smart View Excel interface.			X	

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Planning Applications

CalPlan

CalPlan is a planning tool that provides detailed and summarized views of financial data and the ability to Forecast and create an Operating Budget using task lists, data entry screens, automated calculations, and reporting to guide users through planning steps and workflow. CalPlan users have edit access that is specific to their unit.

Human Capital Planning (HCP)

HCP is a compensation planning tool that provides the ability to Forecast and create an Operating Budget using Employee and Position data. HCP users have edit access that is specific to their unit.

Smart View for Planning

Smart View has an Excel interface to the CalPlanning planning applications that is called Oracle® Hyperion Planning, Fusion Edition. All of the forms used to enter plan data in CalPlan and HCP are available in Smart View. Planners may enter data in the web applications CalPlan and HCP or the Excel-based Smart View tool.

Reporting Applications

CalRptg

CalRptg is a reporting tool that provides access to detailed financial budget and actual data. CalRptg includes pre-defined report templates and utilizes CalRptg Chart of Accounts (COA), including all BFS COA values. CalRptg users have global read-only data access.

HCPRptg

HCPRptg is a reporting tool that provides access to detailed compensation expense data. HCPRptg users have unit specific read-only data access.

Smart View

Smart View has an Excel interface to the CalPlanning reporting databases that allows our finance staff to create and edit ad hoc reports using CalPlan Operating Budget and Forecast data as well as Actuals. The Smart View reporting tool is called Oracle® Essbase. All CalPlanning users have global read-only data access.

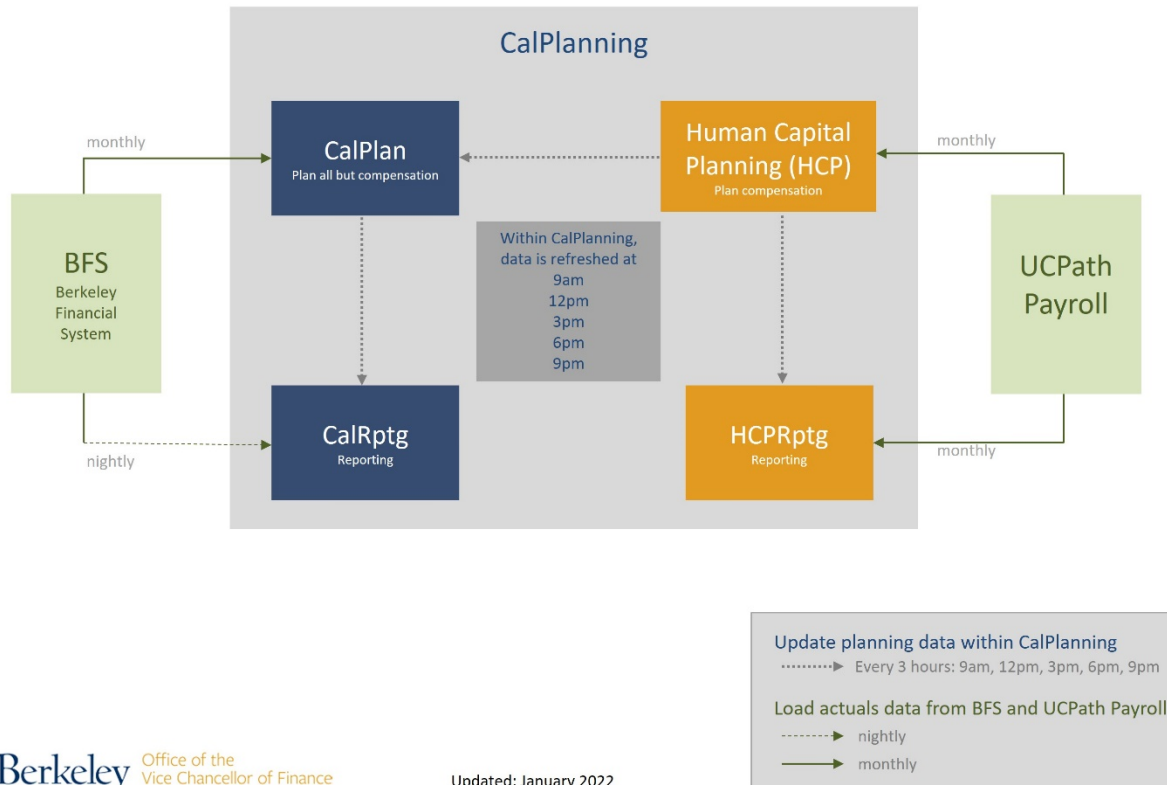
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CalPlanning Tool Integration and Data Flow

CalPlanning data flows through its related applications, on a regularly scheduled basis. Check the CalPlanning website for the [current data push schedule](#).

Below is a chart that outlines data flow within CalPlanning tools and from BFS and UC Path HCM into CalPlanning.

CalPlanning: Data Sources and Refresh Schedule



Based on your CalPlanning role we recommend that you take the following classes:

Training	HCP Rptg & CalRptg Reporters	Planners
CalPlanning: Intro & Reporting	X	X
Navigating CalPlan		X
Navigating Human Capital Planning (HCP)		X
Smart View Ad Hoc for CalRptg	X	X
Smart View for Planning		X

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Training Course Descriptions

All of the CalPlanning training courses use a blended learning model. Each course begins with self-study using an online “book” that is divided into chapters supplemented with practice exercises and brief videos. Courses culminate with a group session using Zoom in which you work on case studies in small teams to apply the material covered in the self-study.

CalPlanning: Intro & Reporting (COURSE CODE: BESPM001)

This first course in the CalPlanning curriculum is for both Planners and Reporting users. In this course, you will learn to:

- Log into CalPlanning
- Identify key reports used to support the budgeting process
- Practice the steps to create, save, print, and analyze canned CalRptg reports
- Understand when plan and actual data is updated in CalPlanning reporting modules
- Set user preferences for accessing unit-specific financial plan and actual data
- Run key budget process reports in your own entity

Activity	Time Commitment
Self-Study	2-4 hours
Group Session	1½ hours

Navigating CalPlan (COURSE CODE: BESPM002)

This class is designed for Planners who are responsible for creating unit financial budgets. The prerequisite for this class is **CalPlanning: Intro & Reporting**. In this course, you will learn to:

- Define the CalPlan tool and CalPlan canned reporting tools and key concepts
- Explore the dimensions of data used in CalPlanning planning and reporting tools
- Identify and practice the steps to create a unit budget utilizing the CalPlan task list, data forms and CalPlan reports
- Review recommended CalPlan resources and job aids to assist in the annual budget process

Activity	Time Commitment
Self-Study	2-3 hours
Group Session	1½ hours

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Navigating Human Capital Planning (HCP) (COURSE CODE: BESPM004)

This class is designed for Planners who are responsible for creating compensation plans for their unit budgets. The prerequisite for this class is **Navigating CalPlan**. In this course, you will learn to:

- Define HCP and HCP Rptg tools and key concepts
- Identify and practice the steps to create a unit compensation budget utilizing the HCP task list, data forms and HCP Rptg reports
- Review recommended HCP resources and job aids to assist in the annual budget process

Activity	Time Commitment
Self-Study	2-4 hours
Group Session	2 hours

Smart View Ad Hoc Basics for CalRptg (COURSE CODE: BESPM012)

This training is designed for Financial Planners and Reporting users who would like to create their own reports using the Smart View Excel interface. The prerequisite for this class is **CalPlanning Reporting**. This course has two sessions with required self-study pre-work for each session. In this course, you will learn to:

- Create a Smart View ad hoc query and save it for reuse
- Select members for POV efficiently using a variety of methods
- Set Options in Smart View to manage your preferences
- Create an ad hoc query/report with stacked dimensions
- Create a cascading report
- Remedy common errors when creating ad hoc queries
- Import a CalPlanning report into Smart View
- Identify best practices for accessing data with Smart View

Activity	Weekly Time Commitment	Weeks
Self-Study	2-4 hours	2
Group Session	2 hours	2

Smart View for Planning (COURSE CODE: BESPM013)

This training is designed for Financial Planners who are responsible for creating unit financial budgets and would like to use the Smart View Excel interface to enter their budget into CalPlan and HCP. The prerequisite is **Navigating CalPlan**. In this course, you will learn to:

- Access and navigate the CalPlan and HCP forms via Smart View
- Enter data into CalPlan and HCP
- Understand the differences between saving data in Excel and CalPlan / HCP

Activity	Time Commitment
Self-Study	2-3 hours
Group Session	1½ hours

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Register for Classes

You can access direct links to enroll in available training classes at <https://calplanning.berkeley.edu/training>

Job Aids

CalPlanning Job Aids are instructional documents that walk you through the different steps of the Budget Process and CalPlanning application access and functionality.

Job Aids are grouped by CalPlanning tool on the CalPlanning website

<https://calplanning.berkeley.edu/getting-started/job-aids>