Copy Data from HCM to HCP

Contents

Introduction 1
What Has Changed? 2
When would I use this new functionality? 2
Where can I see this new functionality? 2
What data and variances are displayed? 3
Copy Existing Employee Monthly Pay from HCM to Plan 4
Copy Existing Employee Distributions from HCM to Plan 6
Copy Existing Employee Monthly Pay and Distributions from HCM to Plan 8
Copy ALL Existing Employee data from HCM to Plan 10
Delete TBH 12

Introduction

Last year, the OCFO completed a major project to not only simplify the way we plan compensation, but also allowed us to actualize our forecast. By planning effort monthly (vs planning by effective dates), we could now overwrite the data forecasted in closed periods with actual results. With the newly enhanced planning tool, we can now see actual salary expenses (even for new hires) on the updated deptIds and distributions that tie to ledger results. This added a couple of added benefits, mainly:

- We no longer need the annual black-out period to update the tool with the annual HCM to HCP refresh
- Planners can see new changes monthly (vs yearly) and can make adjustments to the plan at any time
- We no longer overwrite future dated rows - we no longer overwrite any changes planned for your workforce (including new hires, promotions and/or separations)

At the same time, we reduced the number of plannable intersections, by reducing the funds available to plan to down to our five major fund groups: Unrestricted Funds, Designated Funds, Restricted Gift Funds, Restricted Endowments and FFEs, and Contracts and Grants.

These changes were well-received. The expectation was that planners would update their plans for any known material variances, at least quarterly, as actual results would now change the yeartotal plan - even if the analyst made no changes in the tool! At the time, the OCFO realized that there would be a need to highlight variances between actual and planned effort distributions going forward. We are happy now to introduce new forms and business rules which will allow planners to compare fresh data from the Human Capital Management system (HCM) to the HCP Plan and copy that data to their plan. This can be accomplished one employee at a time or by copying all individual employee data for an entire entity from HCM to Plan. This will be especially helpful if the planner hasn’t regularly updated their plan or if a unit has gone through a large reorganization.
What Has Changed?

An optional step has been added to the Task List in HCP: “Review HCM data to add to Plan”. In this step, planners can review variances between HCM and HCP (and choose which variances to copy to Plan). The HCM data shown for review in this step is a snapshot from the night of 1/30/2019 that was modified in the following ways (to minimize manual corrections):

- **Salaries for employees paid over 10 months were corrected** to remove the need for manual salary adjustments. HCP spreads annual salaries over 12 months. Employees with ‘1/10’ in their titles had their annual salary multiplied by 12/10 so that the 12-month spread and annual salary are correctly calculated.

- **Employees with end dates were extended**, except contract appointment employees and employees who separated before 1/1/2019.

- **Plans for merit increases for FY20 were applied** as follows:
  - Academic employee monthly pay rate was increased by 3% starting in July
  - Non-academic staff employee monthly pay rate July to September periods do not have the salary increase, the October period reflects a 12% increase (because the increase is usually retroactive), and the following months are increased by 3%

Pooled positions and DeptID Adjustments are not affected by this new functionality.

When would I use this new functionality?

We recommend the following as a best practice:

- At least review the variances in this step (you may not want to copy anything from HCM - but you should be aware of the variances)
- Keep in mind materiality when making changes. Some salaries will be slightly greater or less than plan, as not every employee received the average planned increase of 3%.
- Check in with other planners who have access to the same deptIds before copying HCM to HCP. Does the plan currently reflect changes that have not yet been implemented? If you copy HCM to HCP - these future plans will be overwritten.

Where can I see this new functionality?

1. Log into CalPlanning.
2. Click on HCP from the Applications Planning section of the Quick Links box
3. Navigate to **Preferences**. Open **User Variable Options** and enter an Entity.

4. Please select an entity that will not bring more than 1,000 data rows, **we suggest an org level 6 or 7**. Click on **Save**.

5. Click **OK** from the **User preferences have been saved** information pop up box.

6. Navigate to the **My Task List** and expand the **HCP Planner Task List** by clicking on the + box.

7. Click on the task list name to open **Review HCM data to add to Plan**.

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**What data and variances are displayed?**

Once you open the form, you will see three tabs, which correspond to the review and copy functionality: HCM Monthly Pay Rate; HCM Distributions; and HCM Monthly Pay and Dist.

**The HCM Monthly Pay tab** shows (by your selected DeptId or lower level org - again, we recommend **you set your preferences here to an org level 6 or 7**) the employees in your entity, the job code and deptID where planned, the planned monthly salary (by month for open periods) and the monthly salary from HCM. Where there is a variance, the cells are highlighted in orange. Salary amounts are shown rounded to the nearest dollar.

**The HCM Distribution tab** displays (by your selected DeptId or lower level org - again, we recommend **you set your preferences here to an org level 6 or 7**) the employees in your entity, Job Code, DeptID, Distribution accounts, Fund, and Chart and their distribution percentage on this chartstring in your plan and in HCM. It will also show variance between the Forecast data in your HCP plan and the data in HCM (highlighted in orange where there is a variance). **If either the plan or HCM contains no values on this form for an intersection, the blank row will not be displayed (to save space and visual clutter).**
The HCM Monthly Pay and Dist tab displays (by your selected DeptId or lower level org - again, we recommend you set your preferences here to an org level 6 or 7) all of the data from the first two tabs. Here monthly salary data must be shown to the penny, as the distribution data needs to be displayed to two decimal values. If either the plan or HCM contains no values on this form for an intersection, the blank row will not be displayed (to save space and visual clutter). This form also allows planners to copying the monthly pay rate and distributions from HCM to Plan all employees in an L7 Entity. This is a valuable and useful option - but it must be used with caution as any change that are planned will be lost.

Copy Existing Employee Monthly Pay from HCM to Plan

The Copy Existing Employee Monthly Pay functionality allows you to copy the monthly pay rate from HCM to your Plan (Forecast and Operating Budget), for one employee-job code-DeptID combination at a time.

1. Once you open the form, the HCM Monthly Pay Rate data will be displayed:

   ![HCM Monthly Pay Rate Table]

   The form will display the employee name and ID, Job Code, DeptID, the Forecast data, HCM and Plan vs HCM (Variance between Forecast and HCM). If there is a variance, then the cell will be shaded in orange.

2. Select HCM and right-click on Plan or HCM as shown below

   ![Copy Options]

3. In the red highlighted box above there are three copy HCM data options:

   a. Cpy HCM Monthly Rate Forecast - This option will copy the monthly rate from HCM to the open periods of your Forecast
   b. Cpy HCM Monthly Rate OpBudget - This option will copy the monthly rate from HCM to all periods of your Operating Budget
   c. Cpy HCM Monthly Rate Forecast and OpBudget - This option will copy the monthly rate from HCM to the open periods your Forecast and all periods of your Operating Budget
4. Select one of the options above and you will be prompted with following Prompt to confirm your selection of the Employee, Job Code and DeptID then click launch (highlighted in red Box) and the copy data will start.

5. Once the copying is complete the following message will be displayed to inform you that it was completed. Click OK.

6. Select another employee and repeat the process.
Copy Existing Employee Distributions from HCM to Plan

The Copy Existing Employee Distributions functionality allows you to copy distributions from HCM to your Plan (Forecast and Operating Budget), for one employee-job code-DeptID-Fund-Chart1 combination at a time.

1. Go to Review HCM data to add to Plan task and click on the HCM Distributions form (second tab) as shown below.

The form will display the employee name and ID, Job Code, DeptID, Distribution accounts, Fund, and Chart. It will also show variance between the Forecast data in your HCP plan and the data in HCM. If either the plan or HCM contains no values on this form for an intersection, the blank row will not be displayed (to save space and visual clutter).

2. Select HCM and right-click on Plan or HCM as shown below:

3. In the red highlighted box in the image above there are three copy HCM data options:
   a. Cpy HCM Dist Forecast - This option will copy the distribution from HCM to the open periods of your Forecast.
b. **Cpy HCM Dist OpBudget** - This option will copy the distribution from HCM to all periods of your Operating Budget.

c. **Cpy HCM Dist Forecast and OpBudget** - This option will copy the distribution from HCM to the open periods your Forecast and all periods of your Operating Budget.

4. Once you select an option, you will prompted to confirm your selection of the Employee, Job Code, DeptID, Fund, Account, Chart1. Click “launch” and the copy data will start.

5. Once the copying is complete a message will be displayed to inform you that it was completed. Click OK.

6. Select another distribution and repeat the process.
Copy Existing Employee Monthly Pay and Distributions from HCM to Plan

The Copy Existing Employee Monthly Pay and Distributions functionality allows you to copy all of the monthly pay rate and distributions from HCM to your Plan (Forecast and Operating Budget), for one employee-DeptID combination at a time.

1. Go to Review HCM data to add to Plan task and click on the HCM Monthly Pay and Dist form (third tab).

This form shows both monthly pay rate and distributions at the same time. On this form, you'll have the option of copying the monthly pay rate and distributions for individual employees from HCM to Plan. Also, this form provides the ability for planners to copy HCM to Plan for all employees in an L7 Entity. If either the plan or HCM contains no values on this form for an intersection, the blank row will not be displayed (to save space and visual clutter).

2. Copy Monthly pay data and Distribution for an individual employee from HCM to Plan.

2.1 Select an employee and right-click on the selected employee (you will need to find the employee by deptId if you are in an org node higher than an L7 deptId).

2.2 Once you right-click on the employee you will see three copy HCM data options as shown below:

The three copy options are as follow:

a. Cpy HCM By Employee Forecast - This option will copy Monthly Pay Rate and Distributions data for the selected employee from HCM to the open periods your Forecast
b. Cpy HCM By Employee OpBudget - This option will copy Monthly Pay Rate and Distributions data for the selected employee from HCM to all periods of your Operating Budget

c. Cpy HCM By Employee Forecast and OpBudget - This option will copy Monthly Pay Rate and Distributions data for the selected employee from HCM to the open periods your Forecast and all periods of your Operating Budget

3. Select one of the options above and you will prompted with following Prompt to confirm you selection of the Employee and DeptID then click launch and the copy data will start.

<table>
<thead>
<tr>
<th>Prompt Text</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Current Dept ID" /></td>
<td>&quot;1_14027&quot;</td>
</tr>
<tr>
<td><img src="image" alt="Select an Employee" /></td>
<td>&quot;E011308187&quot;</td>
</tr>
</tbody>
</table>

4. Once the copying is complete a message will be displayed to inform you that it was completed. Click OK.

5. Select another employee and repeat the process.
Copy ALL Existing Employee data from HCM to Plan

The Copy ALL Existing Employee data functionality allows you to copy the monthly pay rate and distributions from HCM to your Plan (Forecast and Operating Budget), for ALL employees in a DeptID.

1. Go to Review HCM data to add to Plan task and click on HCM Monthly Pay and Dist form (third tab).

This form shows both monthly pay rate and distributions at the same time. On this form, you'll have the option of copying the monthly pay rate and distributions for selected employee from HCM to Plan. Also, this form provides the ability for planners to copy HCM to Plan for all employees in a DeptID. If either the plan or HCM contains no values on this form for an intersection, the blank row will not be displayed (to save space and visual clutter).

2. Copy Monthly pay data and Distribution for all Employees in one DeptID from HCM to Plan.
   a. Select an DeptID and right-click on the selected DeptID
   b. Once you right-click on the DeptID you will see three copy HCM data options as shown below:

The three copy options are as follow:

   i. Cpy HCM By Entity Forecast - This option will copy Monthly Pay Rate and Distributions data for all employees in the selected Entity from HCM to the open periods your Forecast

   ii. Cpy HCM By Entity OpBudget- This option will copy Monthly Pay Rate and Distributions data for all employees in the selected Entity from HCM to all periods of your Operating Budget

   iii. Cpy HCM By Entity Forecast and OpBudget- This option will copy Monthly Pay Rate and Distributions data for all employees in the selected Entity from HCM to the open periods your Forecast and all periods of your Operating Budget
Keep in mind:

- All of the data individual employees in your Forecast and Operating Budget will be replaced by data from HCM as of the night of 1/30/2019, revised as noted on page 2.
- Other options to accomplish what you need: For instance, if an employee has only moved to a different deptId within the planner’s entity (and all other values remain unchanged), a planner can utilize the “Transfer Employee OUT” functionality within the Manage Existing Employee and Job Code task list (being sure to include the deptId that the employee is moving “to”).
- To Be Hired in your Forecast and Operating Budget will be untouched. After running this functionality, you should review all To Be Hired data and make adjustments or delete the TBH.
- Pooled Employee and DeptID adjustments data will be untouched.

3. Select one of the options above.

4. You will receive a warning asking if you are sure you want to copy HCM to overwrite your plan for this DeptID. You will not be able to get this data back. Click on OK if you want to proceed.

![Launch Confirmation Message]

5. You will prompted with following Prompt to confirm you selection of the DeptID then click launch and the copy data will start.

![Prompt Text]

6. Once the copying is complete a message will be displayed to inform you that it was completed. Click OK.

7. Select another DeptID and repeat the process.
Delete TBH

The Delete TBH data functionality allows you to delete monthly pay rate and distributions from your Plan (Forecast and Operating Budget), for one to be hired employee-DeptID-job code combination at a time.

1. Go to Review HCM data to add to Plan task and click on HCM Monthly Pay and Dist form (third tab).

2. Delete monthly pay rate and distributions from your Plan (Forecast and Operating Budget), for one to be hired employee-DeptID-job code combination.
   a. Select a TBH to delete and right-click on the job code
   b. Once you right-click on the Job Code you will see three copy HCM data options as shown below:

The three options are as follow:

i. Delete TBH Forecast - This option will delete Monthly Pay Rate and Distributions data for the selected TBH-DeptID-Job Code combination in the open periods your Forecast

ii. Delete TBH OpBudget - This option will delete Monthly Pay Rate and Distributions data for the selected TBH-DeptID-Job Code combination in all periods of your Operating Budget

iii. Delete TBH Forecast - OpBudget - This option will delete Monthly Pay Rate and Distributions data for the selected TBH-DeptID-Job Code combination in the open periods your Forecast and all periods of your Operating Budget

3. Select one of the options above.
4. You will receive a warning asking if you are sure you want to delete the To be Hired. You will not be able to get this data back. Click on OK if you want to proceed.

![Launch Confirmation Message]

5. You will be prompted with the following Prompt to confirm your selection of the TBH, DeptID, Job Code, then click launch and the copy data will start.

<table>
<thead>
<tr>
<th>Prompt Text</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Select a Dept ID</td>
<td>&quot;1_14039&quot;</td>
</tr>
<tr>
<td>* Select a To-Be-Hired Employee (eg. To be hired 3)</td>
<td>&quot;To be Hired 1&quot;</td>
</tr>
<tr>
<td>* Select the lowest level Job Code (eg. JC1300)</td>
<td>&quot;JC1200&quot;</td>
</tr>
</tbody>
</table>

6. Once the delete is complete, a message will be displayed to inform you that it was completed. Click OK.

7. Select another To be Hired employee to delete and repeat the process.