Copy Data from HCM to HCP

Introduction

In 2018-19, 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 those changes, 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. In February 2019, we provided forms and business rules which 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.

About UCPath HCM data for HCP

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 UCPath HCM data shown for review in this step is a snapshot from the night of 1/27/2019 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 to June 2021**, except contract appointment employees and employees who separated before 1/1/2020. Contract appointment employees were extended to June 2020.

- **Plans for merit increases for FY21 were applied** by increasing monthly pay rate was increased by 3% starting in July for all employees (non-academic and academic).

- The **CBR group** associated with the employee on the snapshot date was added to the HCP distribution (so it appears in HCP like "A50200 - Acad-Full Benefits-Pct" or "A50200 - Acad-Limited Benefits-Pct")

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

In January 2020, HCP was updated to source from UCPath HCM and to reflect the new Composite Benefit Rate (CBR) structure. **One major change is that when the Copy HCM by Entity ALL Existing Employee data from HCM to Plan is used by the planner,** *all To Be Hired data will be cleared* **in that entity.**

## 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?
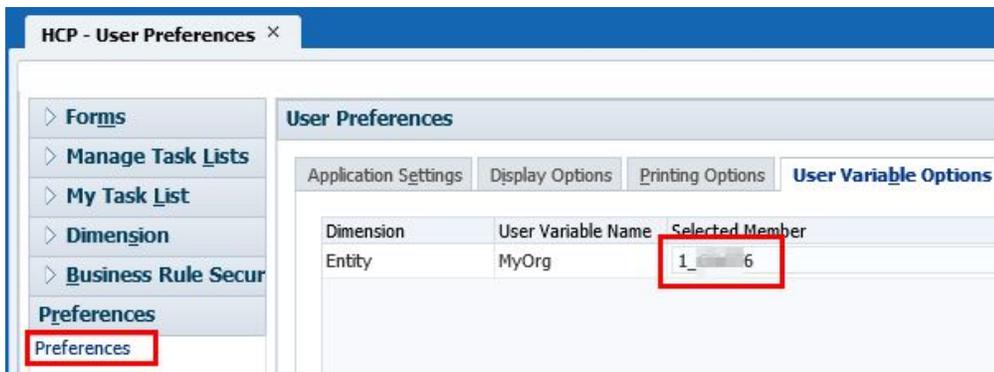
1. Log into CalPlanning.

2. Go to **Navigate > Applications >** and choose either CalPlan or HCP.
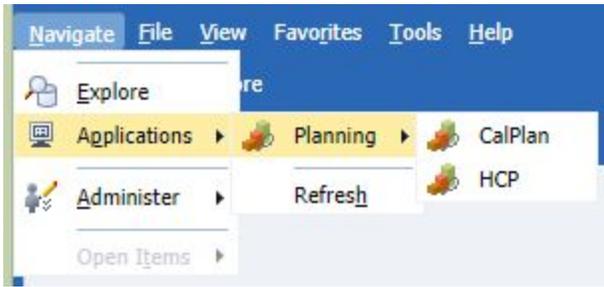
3. Navigate to **Preferences**. Open **User Variable Options** and enter an Entity.

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.**

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 changes 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	HCM Distributions	HCM Monthly Pay and Dist			Comments	Jan	Feb
001200 - ASSOC PROF-AY	1_			Plan		11,602	11,602
				HCM		11,092	11,092
				FCST vs HCM		510	510
003270 - ASST PROF IN RES-AY	1_			Plan		9,466	9,466
				HCM			
				FCST vs HCM		9,466	9,466
004575 - STDT SVC ADVISOR 3	1_			Plan		5,417	5,417
				HCM		5,417	5,417
				FCST vs HCM		0	0

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

HCM Monthly Pay Rate	HCM Distributions	HCM Monthly Pay and Dist

			Comments	Jan	Feb
001100 - PROF-AY	1_1▇▇▇▇	FCST vs HCM		8,759	8,759
		Plan		24,308	24,308
		HCM			3,633
		FCST vs H	Cpy HCM Monthly Rate Forecast		675
001200 - ASSOC PROF-AY	1_3▇▇▇		Cpy HCM Monthly Rate OpBudget		
		Plan	Cpy HCM Monthly Rate Forecast and OpBudget		1,602

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

   a. Cpy HCM Monthly Rate Forecast - Copy the monthly rate from HCM to the open periods of your Forecast
   b. Cpy HCM Monthly Rate OpBudget - Copy the monthly rate from HCM to all periods of your Operating Budget
   c. Cpy HCM Monthly Rate Forecast and OpBudget - 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 presented 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.

Prompt Text	Value
* Select an Employee (eg. E012494996)	"E1▇▇▇▇"
* Select the lowest level Job Code (eg. JC1300)	"JC001100"
* Current Dept ID	"1_1▇▇▇"

Launch Cancel

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

(i) Information ✕

Cpy HCM Monthly Rate Plan was successful.

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 box in the image above there are three copy HCM data options:
    a. **Cpy HCM Dist Forecast** - Copy the distribution from HCM to the open periods of your Forecast.
    b. **Cpy HCM Dist OpBudget** - Copy the distribution from HCM to all periods of your Operating Budget.
    c. **Cpy HCM Dist Forecast and OpBudget** - 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 be prompted to confirm your selection of the Employee, Job Code, DeptID, Fund, Account, Chart1. Click "launch" and the copy data will start.

Prompt Text	Value	
* Select an Employee (eg. E012494996)	"E1_____"	
* Select the lowest level Job Code (eg. JC1300)	"JC001200"	
* Current Dept ID	"1_3___"	
* 1:Select the lowest level Fund (e.g. Unrestricted_Plan)	"Unrestricted_Plan"	
* 1:Select Acct	"A50200_Acad_Full_Pct"	
* 1:Select the lowest level Chart1 (eg. C1_SUMPLN)	"C1_SUMPLN"	

[Launch] [Cancel]

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 follows:
   a. Cpy HCM By Employee Forecast - 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 - 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 - 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 be prompted with following Prompt to confirm you selection of the Employee and DeptID then click launch and the copy data will start.

Runtime Prompts - Cpy HCM By Employee Plan		✕
Prompt Text	**Value**	
⊞* * Current Dept ID	"1_3⬛	🔽
⊞* * Select an Employee (eg. E012494996)	"E10⬛	🔽
		Launch Cancel

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**.

> **One major change as of January 2020:** When the **Copy HCM by Entity to Plan** is used by the planner, *ALL To Be Hired data will be cleared* in that entity. Make note of To Be Hired data (i.e. export the forms to Excel) in case you need to re-enter it.

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:
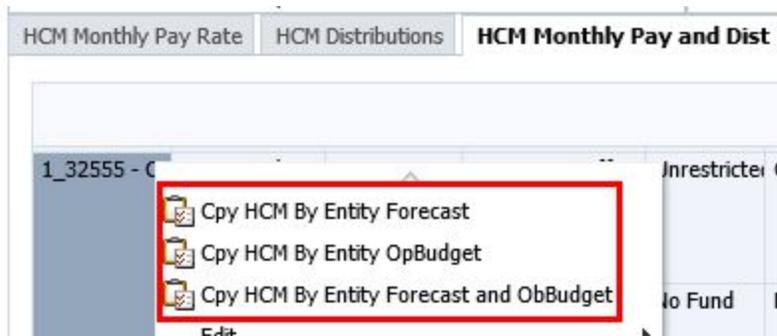


The three copy options are as follows:

i. Cpy HCM By Entity Forecast - 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- 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- 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 1/27/2020, 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").
- **One major change as of January 2020:** When the **Copy ALL Existing Employee data from HCM to Plan** is used by the planner, *ALL To Be Hired data will be cleared* **in that entity.** Make note of To Be Hired data in case you need to re-enter it.
- 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.
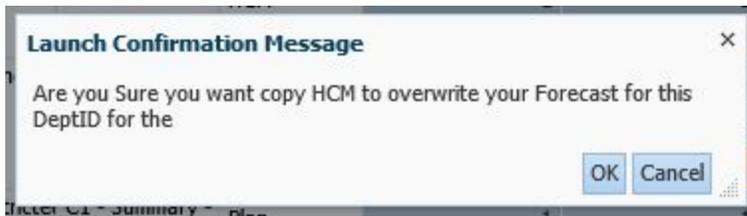
5. You will be prompted with following Prompt to confirm you selection of the DeptID then click launch and the copy data will start.

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 follows:

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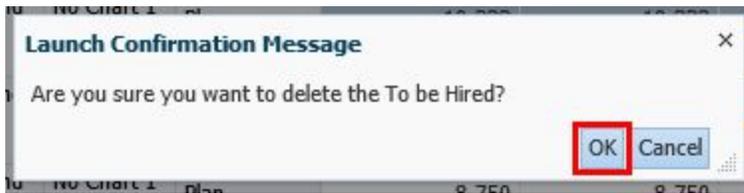
5. You will be prompted with following Prompt to confirm you selection of the TBH, DeptID, Job Code then click launch and the copy data will start.

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.