

# HCM Management Data Portal Training





# Exporting Data (Data Flavor 2)



- To export data from this type of report, navigate to the top right corner and selecting the 'View Report' button

Department	Fund	Designation	Account	Unspecified	Default	Project
General Institutional	Operating	Personnel Cost Distributions	PPM-Labor	Unspecified	Default	Bryan
General Institutional	Operating	Personnel Cost Distributions		Unspecified		
General Institutional	Operating	Personnel Cost Distributions		Unspecified		



# QRG's



# Employee Detail



## Business Case

View a variety of details about employee assignment by entity, Division, Unit, or Department  
Ex. Shows snapshot of employee detail; can filter down by department to get full picture.

## Questions Answered

- How many FTE's do I have?
- What is Bruiser Bear's pay grade and salary? Is there room for an increase in their pay grade?
- What is Bruiser's performance appraisal score?

## Instructions/ Expectations

- Review as needed to view a snapshot of the personnel in your area
- Prompt by Division Unit or Department to view snapshot of an organization and details on personnel in your area
- Prompt by employee number to view desired details for a chosen employee

## Location

Tools > HCM Management Data Portal  
Tools > Financial Management Data Portal

## Audience

- Business Officers (entity data)
- HCM Specialists (all data)
- Central HR (all data)

## Additional Notes

-Entity code refers to the finance chart of account value assigned to the department. Will primarily be used by Business Officers.



# New Hires



## Business Case

View new hires, report is auto prompted to show new hire employee detail if hired within the last 30 days.

## Questions Answered

- Who was hired within XX department within the last 30 days?
- What new positions have been filled?
- What is my new hire's email address?

## Instructions/ Expectations

- Review monthly to ensure timely onboarding of new associates within your department.
- Can customize date ranges to capture broader or narrower history of new hires within your department.

## Location

Tools > HCM Management Data Portal

## Audience

- Business Officers (entity data)
- HCM Specialists (all data)
- Central HR (all data)

## Additional Notes

-Original hire dates will be loaded into the system, capturing historic data.



# Separation Detail



## Business Case

View separating employees, auto prompted to a 30 day snapshot.

## Questions Answered

- Who is separating from my department?
- When is a specific employees last day?
- What has been the main separation reason for xx department over the last year?

## Instructions/ Expectations

- Use report to ensure timely process of exit process.
- Monitor to ensure proper backfill for soon to be open positions.
- Can set specific date ranges to capture broader or narrower history of separations within your department.
- Can filter by termination reason and category (retiree, resignation, graduation, involuntary, voluntary).

## Location

Tools > HCM Management Data Portal

## Audience

- Business Officers (entity data)
- HCM Specialists (all data)
- Central HR (all data)

## Additional Notes

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# Absences & Leaves



## Business Case

View current, past, and future employees on leave.

## Questions Answered

- Who is currently absent from the office?
- What is their leave status?
- What is the reason for their leave?
- How many days has the employee been absent from the office?
- How much time does the employee have remaining?

## Instructions/ Expectations

- View bi-weekly to manage your workforce that is out on leave.

## Location

Tools > HCM Management Data Portal

## Audience

- Business Officers (entity data)
- HCM Specialists (all data)
- Central HR (all data)

## Additional Notes

- Default time period captured is today plus 14 days.
- Top of report captures all absences. Leave detail summary is at the bottom of the page.





# Hours Monitor



## Business Case

View employees total reported hours per time period.

## Questions Answered

- Who is reporting hours worked that exceed their scheduled assignment working hours?
- Who is reporting hours lower than their schedule assignment working hours?
- What hourly employees have not submitted time in a given time period?

## Instructions/ Expectations

- View prior to payroll validation payroll process
- Prompt by pay period by selecting the Time-Card End Date
- Used to see at a glance, who is working over their allotted amount of hours within a given amount of time.
- Filter by student assignment category and one week time span to see which students are submitting timecards that exceed 20 hours a week
- View the second table to identify hourly employees who have not entered hours in a given time period.

## Location

Tools > HCM Management Data Portal

## Audience

- Business Officers (entity data)
- HCM Specialists (all data)
- Central HR (all data)

## Additional Notes

- Employees in the second table are hourly employees who are not displayed with hours in the first table. Use the prompts to filter data to view hours entered for specific time range or department and then look below to view those hourly employees who did not enter time.
- Assignment hours are multiplied by 2 and then compared to the hours entered for a two-week time period. If you prompt by a time period other than a two-week time span, this comparison will not be relevant.



# Salary Costing & Commitment



## Business Case

View the costing string and percentage split by employee and assignment. View the projected salary costs to be spent before the end of the budget period.

## Questions Answered

- What is the costing split for a particular employee?
- Who is costed to my Department?
- Who is costed to my Award/ Project?
- What is the projected salary costs for a particular employee this year?

## Instructions/ Expectations

- Review monthly or as needed to monitor personnel costing in your area
- Prompt by Entity or Department to view the people fully or partially costed to your area
- Prompt by Person Number or Person Name to view costing for an employee
- Prompt by project end dates to ensure employees will not be costed to an inactive project – enter a date to see the Project End Dates that are to happen before that date.

## Location

Tools > Financial Management Data Portal  
Tools > HCM Management Data Portal

## Audience

- Business Officers (Entity Data)
- HCM Specialists (All Data)
- URAs (Entity Data)
- Central Finance (All Data)
- Central HR (All Data)

## Additional Notes

- Costing data reflects real time changes
- Projected salary costs will be the most accurate the beginning of the month after monthly Payroll has been paid for the previous month. Formula is as follows: Monthly Salary \* Months left to be paid in budget period (employees with end dates prior to the end of the budget period will only have committed salary for months that they should be paid.



# Salary Costing History



## Business Case

View complete history of salary costing and percentage split by employee, assignment, and time period.

## Questions Answered

- What is the costing split for a particular employee at a given point in times?
- Who was costed to an Award/ Project in a given month?
- What is the complete costing history snapshot for a given employee?

## Instructions/ Expectations

- Prompt by Entity or Department to view the people fully or partially costed to your area
- Prompt by Person Number or Person Name to view a complete costing history for an employee
- Prompt by Award or project to view employees who were costed to an award over a given span of time

## Location

Tools > Financial Management Data Portal  
Tools > HCM Management Data Portal  
Tools > Project Management Data Portal

## Audience

- Business Officers (Entity Data)  
- HCM Specialists (All Data)  
- URAs (Entity Data)

- Central Finance (All Data)  
- Central HR (All Data)

## Additional Notes

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# Additional Compensation and Benefits Costing



## Business Case

View costing string and percentage split by additional pay or benefits for an employee.

## Questions Answered

- What is the costing split for a faculty overload for a particular employee?
- What additional pay or benefits are costed to my Award/ Project?
- Where was an employee's benefits previously costed?

## Instructions/ Expectations

- Review monthly or as needed to monitor personnel costing in your area
- Prompt by Entity or Department to view the additional compensation and benefits fully or partially costed to your area
- Prompt by Person Number or Person Name to view all costing for an employee's additional compensation and benefits
- Prompt by date to view compensation costing for a certain time period

## Location

Tools > Financial Management Data Portal  
Tools > HCM Management Data Portal  
Tools > Project Management Data Portal

## Audience

- Business Officers (Entity Data)
- HCM Specialists (All Data)
- URAs (Entity Data)
- Central Finance (All Data)
- Central HR (All Data)

## Additional Notes

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# Pre-Payroll – Earnings and Deductions Validation



## Business Case

Used to validate earnings and deductions entered in a pay period. Spot check for accuracy in changes and new hires as well as large amounts.

## Questions Answered

- What deductions are currently entered for an employee?
- What earnings are currently entered for an employee?

## Instructions/ Expectations

- View prior to payroll validation payroll process
- Choose date range for element last update to confirm changes to earnings and deductions are correct prior to payroll being processed
- Choose date range for new hires to confirm earnings and deductions
- Prompt for an amount greater than to identify large earning amounts that may be in error
- Make corrections if errors are caught during review process

## Location

Tools > HCM Management Data Portal

## Audience

- Business Officers (entity data)
- HCM Specialists (all data)
- Central HR (all data)

## Additional Notes

-Element = deduction type or earning



# Current and Former Employees



## Business Case

View current and former employees that are applying to jobs. Review current and former employee employment details.

## Questions Answered

- Are any of our applicant's current employees?
- Are any of our current applicants' former employees?

## Instructions/ Expectations

- Identify applicants that are former employees
- Identify applicants that are current employees; then search name on Employee Detail Dashboard to get snapshot of employee

## Location

Tools > HCM Management Data Portal

## Audience

- Business Officers (entity data)
- HCM Specialists (all data)
- Central HR (all data)

## Additional Notes

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# Appendix

