

# Human Capital Management: Step-by-Step Guide

## Getting Started with HCM

This guide describes a few tasks to help new users get started with HCM.

Before you can access HCM, you must complete the HCM Fundamentals online course available in Skillsoft. Visit the [HCM Access and Training website](#) for more information about requesting access and training requirements.

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## Before You Begin

To perform the tasks described in this guide, you will need the following information.

- Employee ID of someone in your department whose information you are authorized to view.
- Department number of your department.

## Logging On to HCM

To access HCM from the employee portal homepage:

1. Log on to the employee portal at <http://my.cu.edu>.

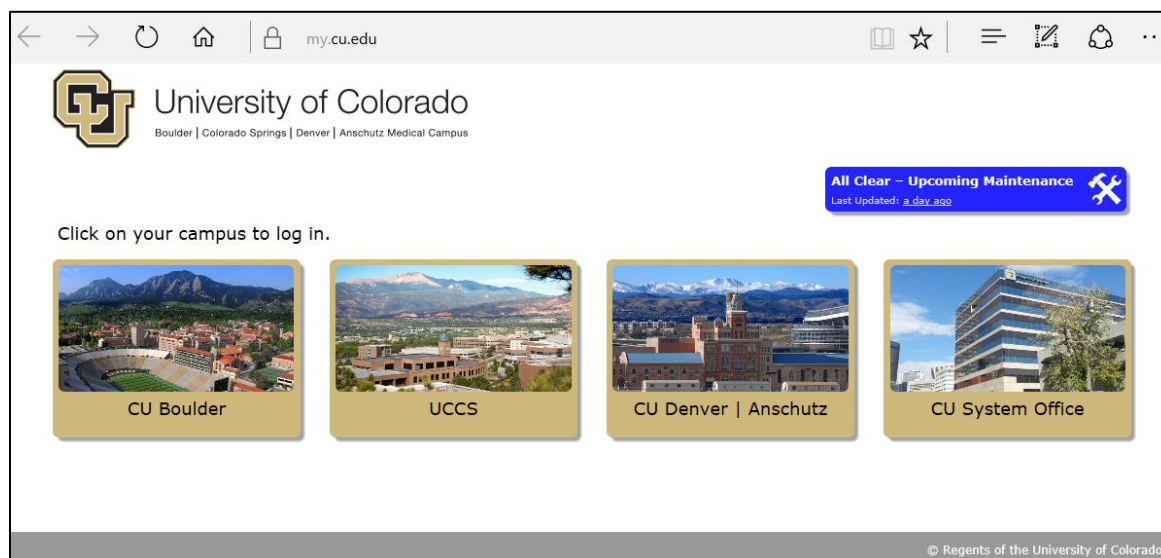


Figure 1: Employee portal log in page.

2. From the portal homepage, select the **HCM** tile. If you do not see the HCM tile, you do not have permission to access the system. Go to [HCM Access and Training website](#) for information about requesting access.

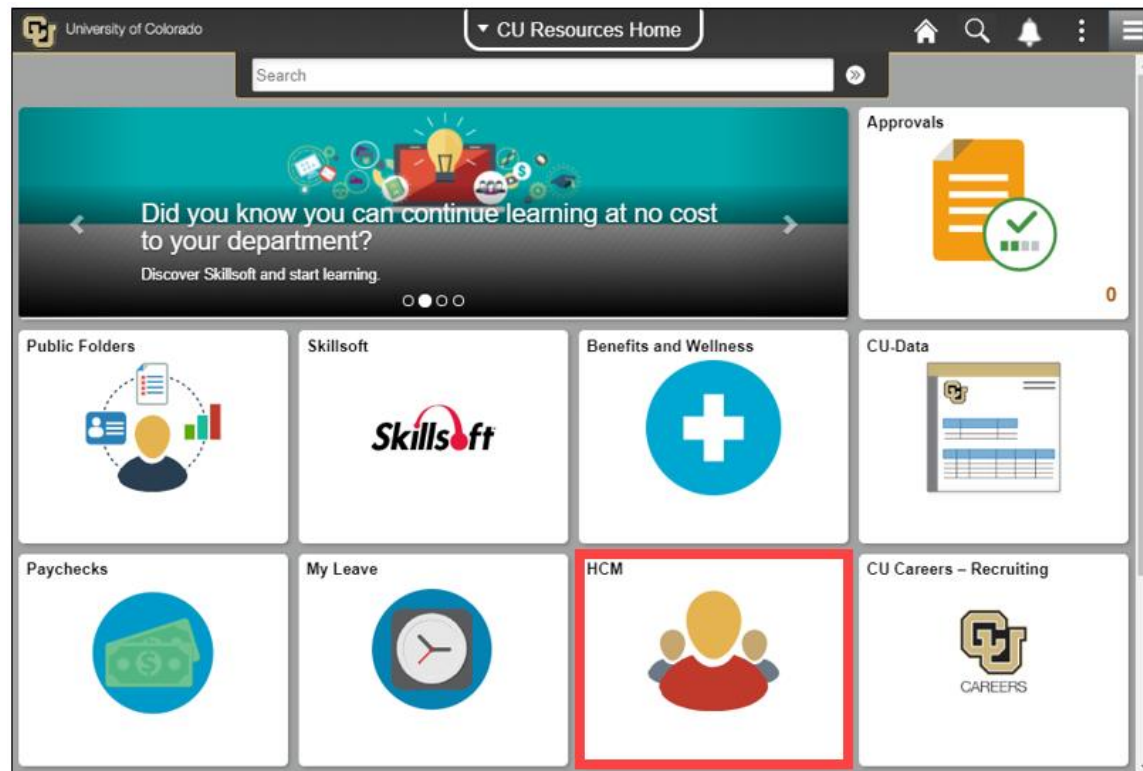


Figure 2: Employee portal homepage. You may see different content based on your campus.

HCM opens to the Employee Self Service dashboard:

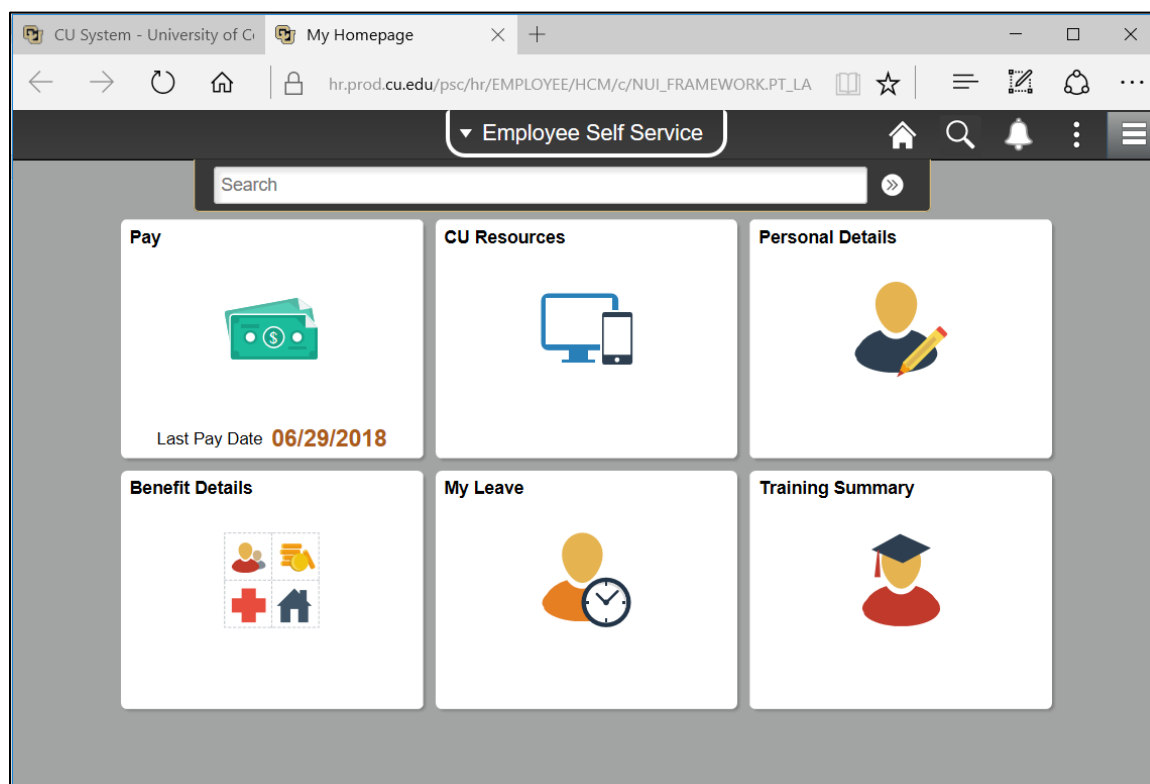


Figure 3: HCM Employee Self Service dashboard. Click the **Employee Self Service** drop-down to access the Manager Self Service dashboard and the HCM Community Users dashboard.

## Viewing Employee Job Data (and Creating a Favorite)

Many users need to check job data of an employee. The following steps describe how to see an employee's job data. At a minimum, you will need to know the name of the employee you would like to view. Knowing the employee ID (Empl ID) works best for finding the correct employee. You may be limited to seeing only employees in your department.

To view job data of an employee:

1. From the Employee Self Service page, select **NavBar**.
2. Select **Navigator**.
3. Select **Workforce Administration**.
4. Select **Job Information**.
5. Select **Job Data**.

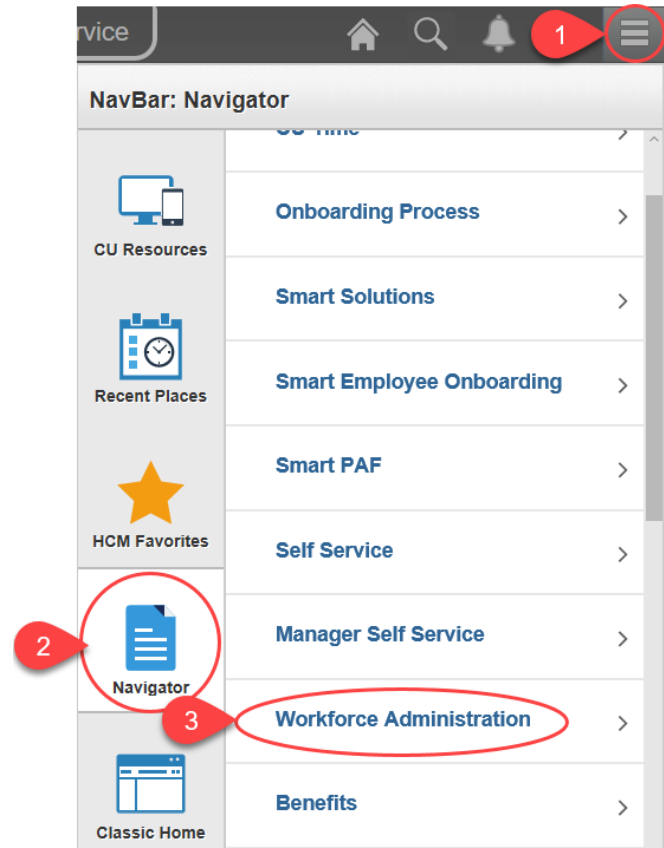


Figure 4: NavBar: Navigator menu.

The Job Data page appears:

Figure 5: Job Data page.

6. Because the Job Data page is viewed frequently by users, consider making this page a favorite so you can access it with fewer steps in the future (which this guide describes in the next section):

- a. Select the **Actions list** menu 

- b. Select **Add to Favorites**.

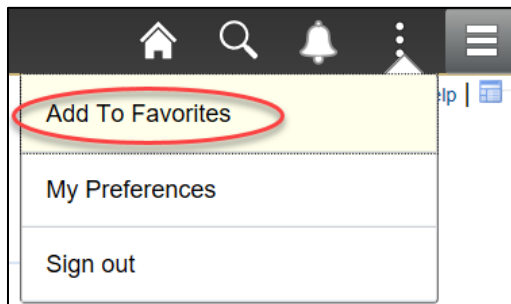


Figure 6: Actions list menu.

The system prompts you for a unique name, with the name Job Data already displayed.

- c. Select **OK**. Later in this guide, you will see how to access the page again as a favorite.
7. In the **Empl ID** field, type the employee ID of the person you want to view.

8. Select **Search**. The Search Results are displayed below the Search Criteria:

### Job Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)
[Keyword Search](#)

▼ **Search Criteria**

Empl ID

begins with

180

×

Empl Record

=

Name

begins with

Last Name

begins with

Second Last Name

begins with


Alternate Character Name

begins with

Middle Name



begins with

☐ Include History
 ☐ Case Sensitive

[Search](#)
[Clear](#)
[Basic Search](#)

[Save Search Criteria](#)

### Search Results

[View All](#)

First
 
 1-2 of 2
 
 Last

Empl ID	Empl Record	Name	First Name	Last Name	Second Last Name	Alternate Character Name	Middle Name
180	0				(blank)	(blank)	K
180	1				(blank)	(blank)	K

Figure 7: Job Data Search Results.

9. Notice this employee has two Empl Records, 0 and 1. The 0 record is the current record. The 1 record is a previous employment record that is no longer active. In this example, the employee was previously a student employee who was later hired as a regular employee.

10. Select the current record. The system displays job data, beginning with the Work Location tab, shown below. Also shown is the HR Status indicating this employee is Active. Terminated employees appear with an HR Status of Inactive and a Payroll Status of Terminated.

**Employee Self Service**

Work Location | Job Information | Payroll | Salary Plan | Compensation

Empl ID [Redacted] Empl Record 0

**Work Location** Find First 1 of 1 Last

Effective Date 07/01/2018

Effective Sequence 0

**HR Status** Active

Payroll Status Active

Action Pay Rate Change

Reason Merit - Base Building

Job Indicator Primary Job

Current

Position Number [Redacted] Override Position Data

Position Entry Date 09/01/2008

☐ Position Management Record

Regulatory Region USA United States

Company CU University of Colorado

Business Unit USYS System Administration

Department 51000 Employee Services

Department Entry Date 08/01/2014

Location 5UCA Office of the President

Establishment ID CU University of Colorado

Date Created 06/28/2018

Last Start Date 06/12/2006

Expected Job End Date


Job Data Employment Data Earnings Distribution Benefits Program Participation

Save Return to Search Previous in List Next in List Notify Refresh Update/Display Include History

Work Location | Job Information | Payroll | Salary Plan | Compensation

Figure 8: Job Data page showing Empl Record 0 of an active employee.

11. Select the other tabs to see more information about this employee's job data record.
- Job Information – displays job code, title and who the employee reports to.
  - Payroll – displays current payroll information including pay group.
  - Salary Plan – displays information about the employee's salary and pay grade.
  - Compensation – displays pay rate and frequency of pay.

12. When you have finished viewing the record, select **Home**  to return to the Employee Self Service dashboard.

## Accessing a Favorite Page

In the previous section, you saved Job Data as a favorite page. When you are logged in to HCM, you can access favorite pages quickly from the NavBar menu.

To display a favorite page while logged into HCM:

1. Select **NavBar**.
2. Select **HCM Favorites**.
3. Select the page.

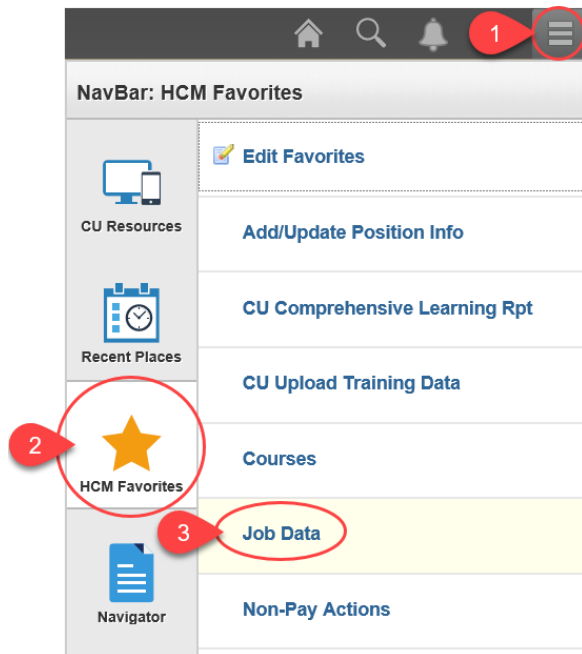
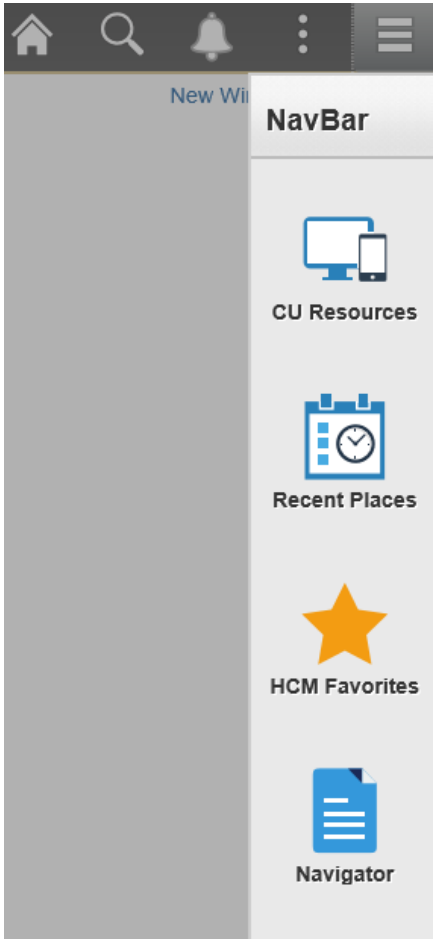
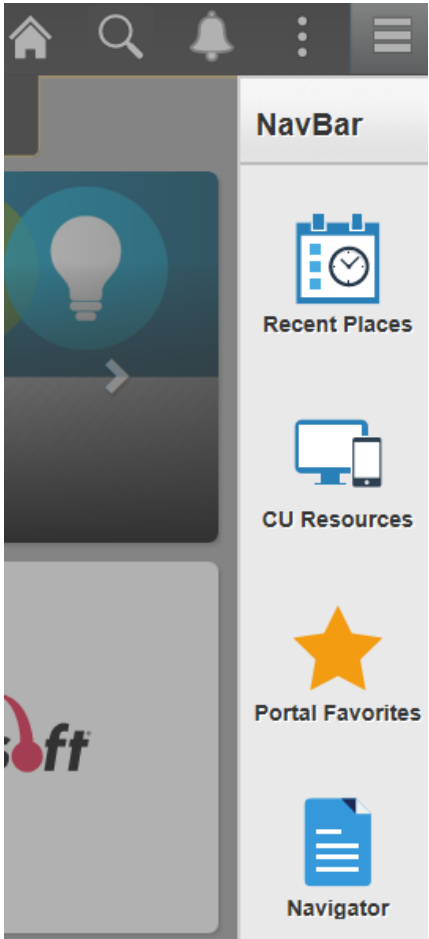


Figure 9: Steps for selecting an HCM page saved as a favorite.



When you are logged into the portal, but not in HCM, the NavBar menu displays portal favorites. The two images below show how the NavBar changes, depending on whether you are in HCM or the portal.

NavBar choices when logged into HCM appear below:	NavBar choices when logged into the portal, but not into HCM, shown below:
	

## Running a Query in HCM

HCM offers many queries that you can use. A query is a request for specific information from the tables of a database that meets criteria you specify.

To run a query:

1. Select the **Employee Self Service** drop-down to display the dashboard menu.
2. Select **HCM Community Users**.

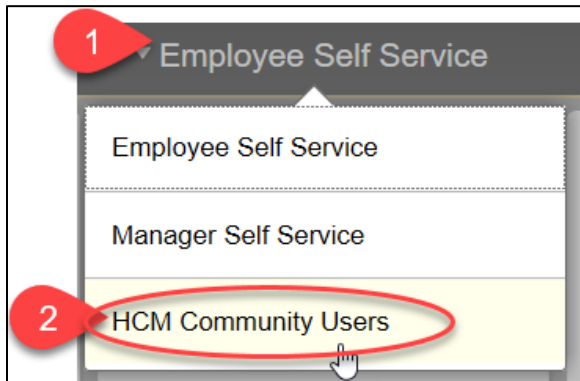


Figure 10: Employee Self Service drop-down providing access to other dashboards.

3. Select the **HCM WorkCenter** tile. The HCM User WorkCenter appears.
4. Select the **Resources** tab. The HCM Queries section displays a list of queries. You may need to hover over the menu to display a scroll bar (circled below).

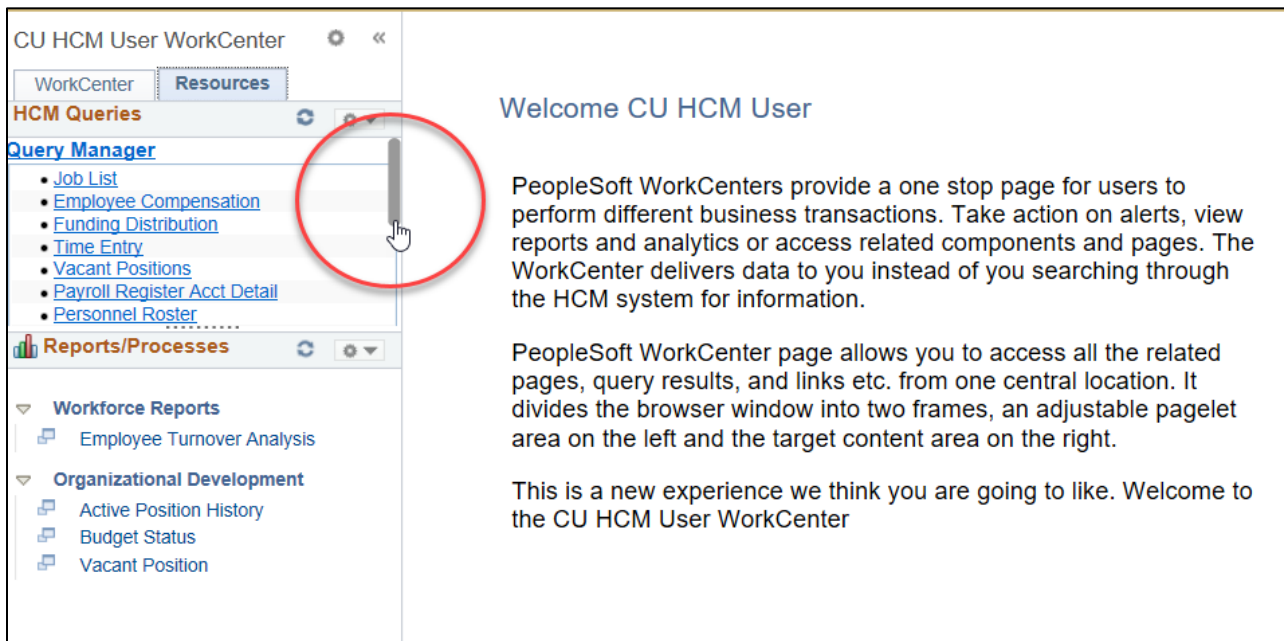


Figure 11: The HCM User WorkCenter provides access to queries and other useful reports.

5. Drag the scroll bar to the bottom of the list and select **Click here for ALL**.

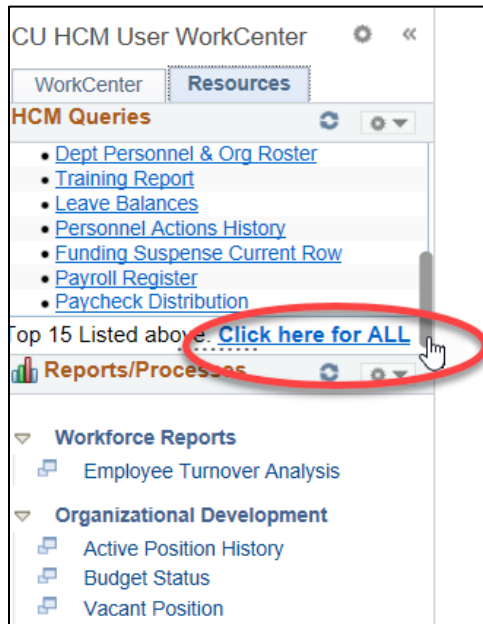


Figure 12: HCM Queries section lists the 15 most used queries; scroll down to bottom to access all queries.

The List of All HCM Queries page appears. Let's look at your department roster.

6. Select the query, **Dept Personnel & Org Roster**. This query is listed as number 12 in the image below. As queries are added and removed in HCM, the number may change.

12	<a href="#">Dept Personnel &amp; Org Roster</a>	This query returns a list of all active employees with position and job data by department.	15134	CUES_HCM_PERSONNEL_ORG
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The system opens the query page for you to enter criteria.

**CUES\_HCM\_PERSONNEL\_ORG - Dept Personnel & Org Roster**

Dept ID (Optional)

Job Code (optional):

7. In the **Dept ID** box, type the ID of your department.



As another option, you could type the first numeral of your department ID and click the lookup (magnifying glass) to display a list of departments starting with that numeral, and then select one from the list.

8. Select **View Results**.



While the system processes your query (or any other request), a processing icon appears in the top right corner. When it finishes, the system displays the results of your query.

The system also displays options for saving the results.

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (66 kb)

## Finding More Information about Using HCM

Visit the HCM Community website (<https://www.cu.edu/hcm-community>) for more information, including step-by-step guides, job aids and frequently asked questions (FAQs). You can find documentation related to the actions listed on the menu, such as Recruit & Hire or Pay Employees, or access the Document Library from the Training menu as shown below.

