

# 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 Skillssoft. Visit the [HCM Access and Training website](#) for more information about requesting access and training requirements.

## Contents

Before You Begin .....	1
Logging On to HCM .....	2
Viewing Job Data (and Creating a Favorite) .....	4
Accessing a Favorite Page .....	8
Customizing Your Homepage .....	9
Running a Query in HCM .....	10
Finding More Information about Using HCM.....	12

## 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>.

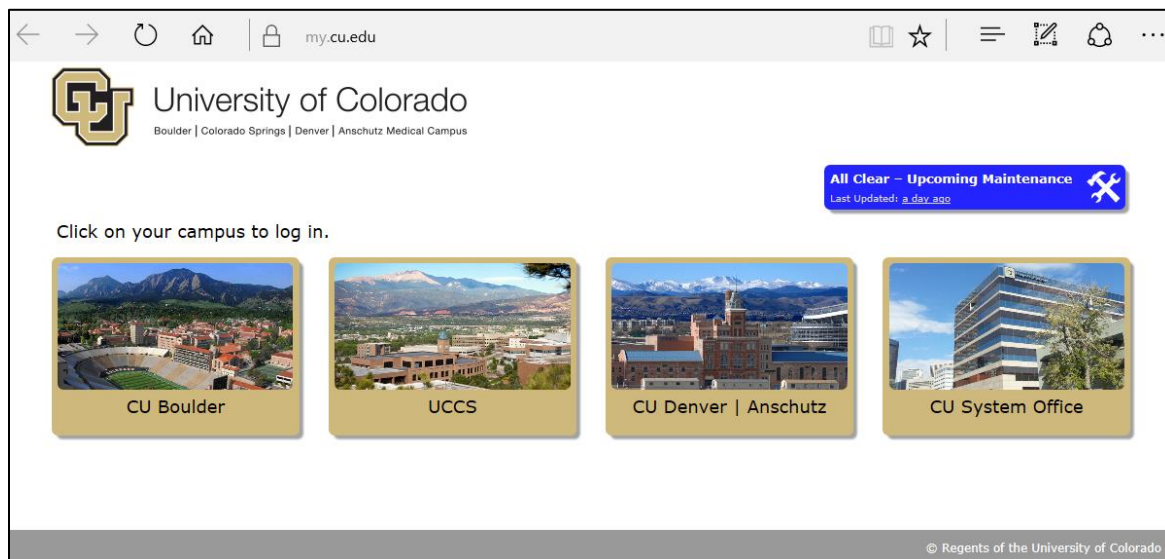


Figure 1: Employee portal log in page.

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.

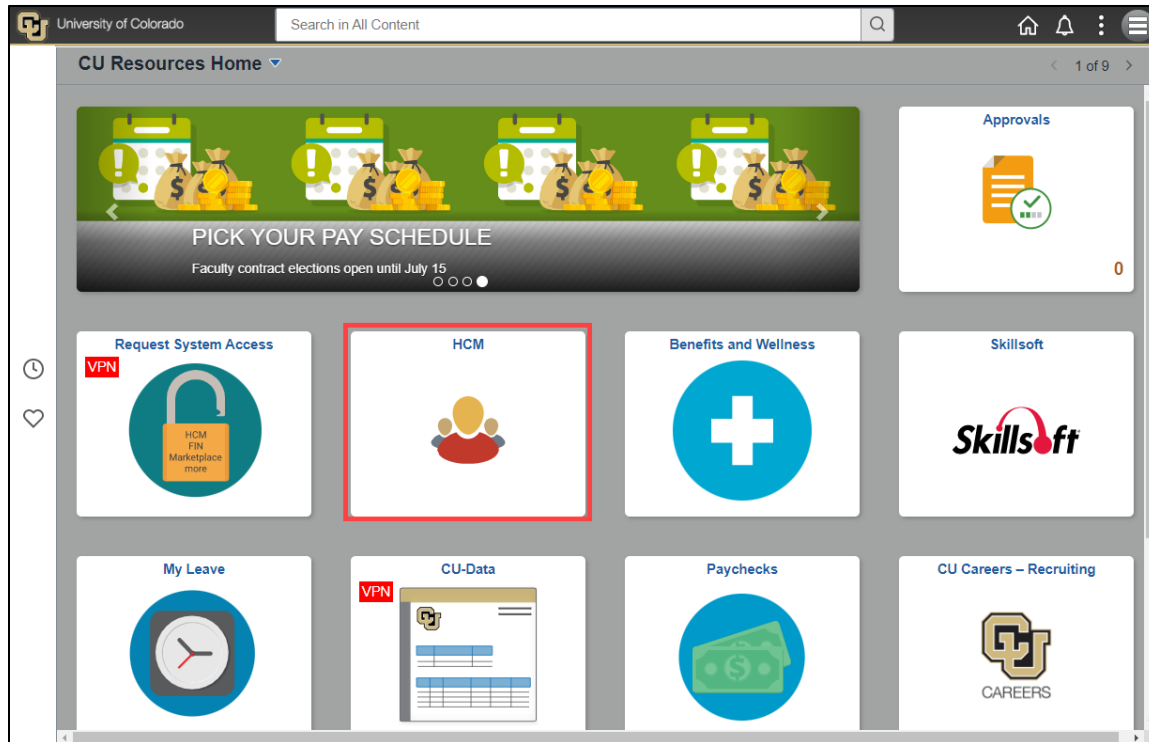


Figure 2: Employee portal homepage. You may see different content based on your campus.

HCM opens to the Employee Self Service dashboard:

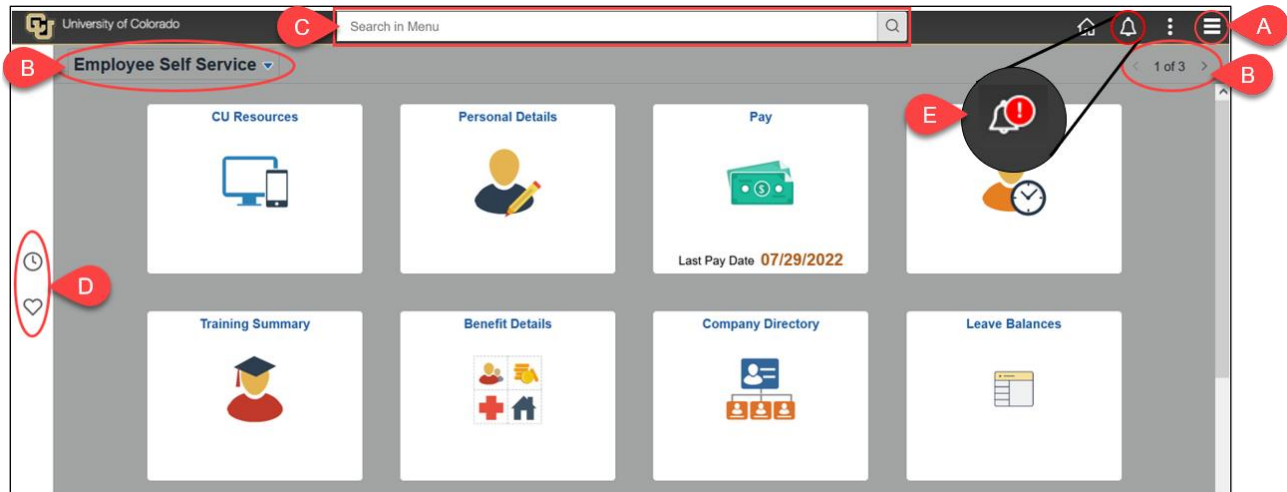
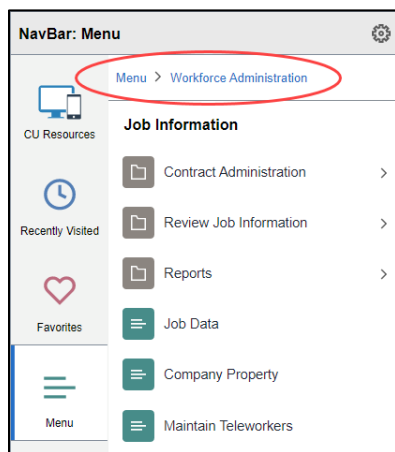


Figure 3: HCM Employee Self Service dashboard.

From this page you can use the following features to navigate:

- A. The NavBar displays many options for navigating, including a drill-down Menu to all the pages you have access to, Recently Visited items, and Favorites. There is also an option to go to the CU Resources page in the portal. As you use the menu, breadcrumbs appear at the top (circled below). You can click a breadcrumb to go to any item in the menu trail, including the root menu.



- B. Move between homepages using the homepage dropdown menu (top left) or the next and previous arrows (top right). Employee Self Service is the default homepage when you start using HCM. You can also access the HCM Community Users and Manager Self Service homepages from here.
- C. The global search field on the homepage is always available. When you click the Search in Menu field, the system displays search suggestions based on your recently visited menu items combined with those of others using the system. Start typing and the system begins filtering search suggestions to match. You can then select a suggestion from the list to go to that item.
- D. The quick access bar on the left provides one-click access to your favorites (heart icon) and most recently visited items (clock icon).
- E. Notifications appear in the top-right corner with an exclamation point alerting you to new notifications.

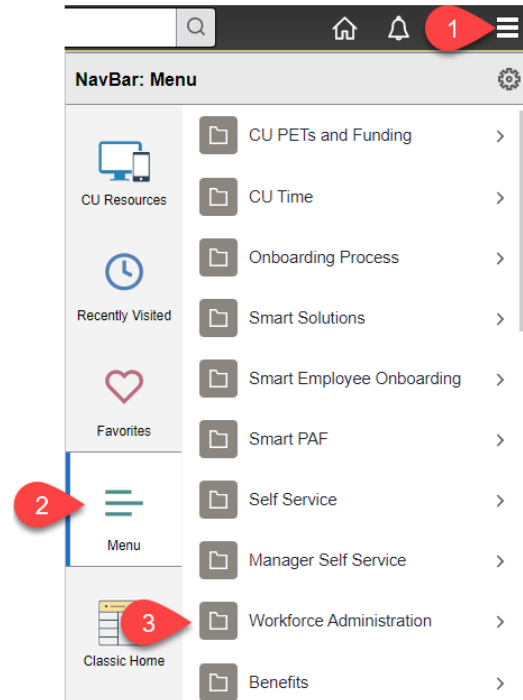
**Note:** Features B through D are available from fluid homepages only and not on dashboards or navigation collections.

## Viewing Job Data (and Creating a Favorite)

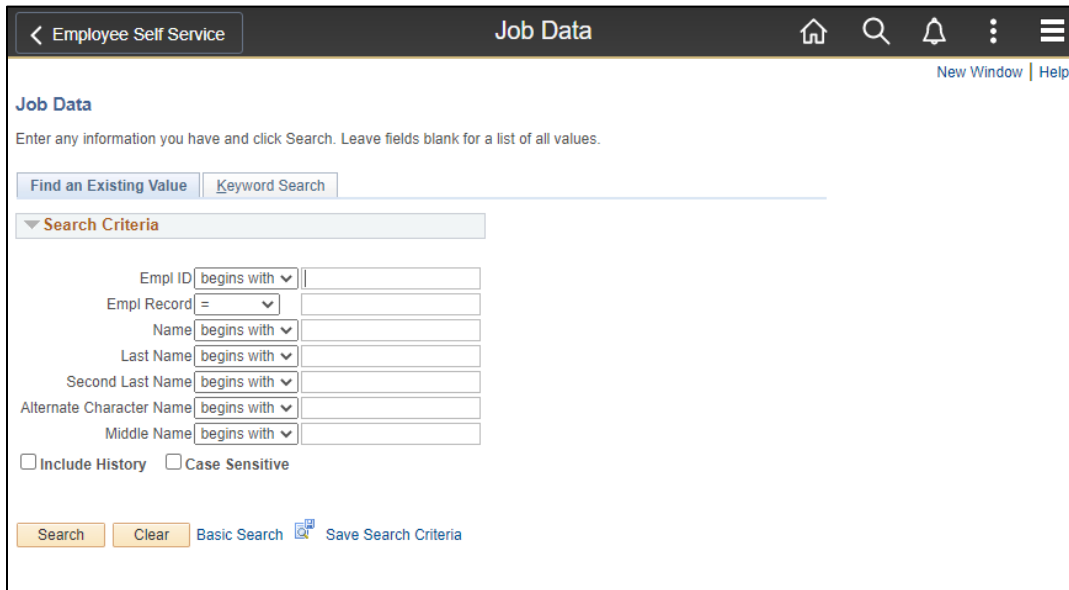
Many users need to check job data of an employee. The following steps describe how to see an employee's job data. At a minimum, you will need to know the name of the employee you would like to view. Knowing the employee ID (Empl ID) works best for finding the correct employee. You may be limited to seeing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

To view job data of an employee:

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

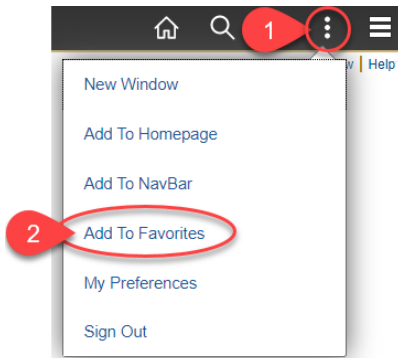


The Job Data page appears:



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**.



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

- c. Select **Add**. 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 x

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 4: 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. Click 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.

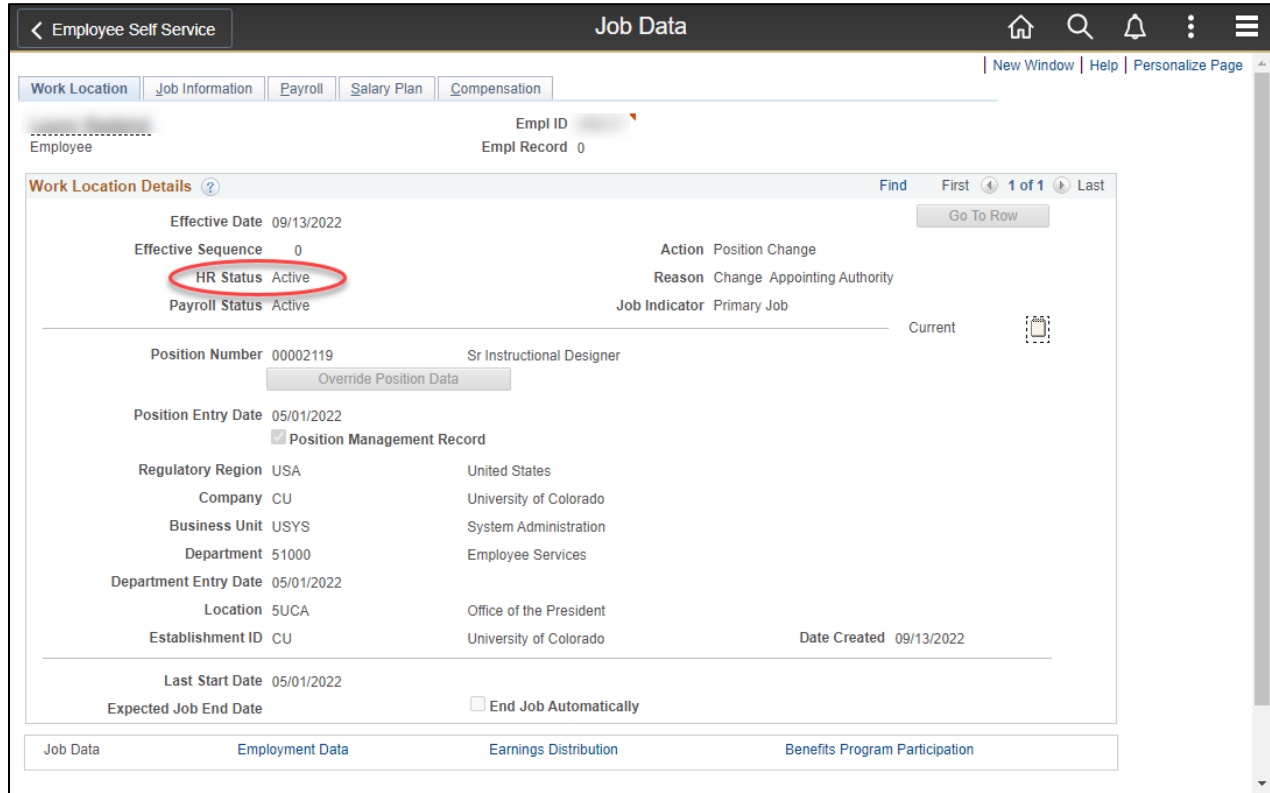

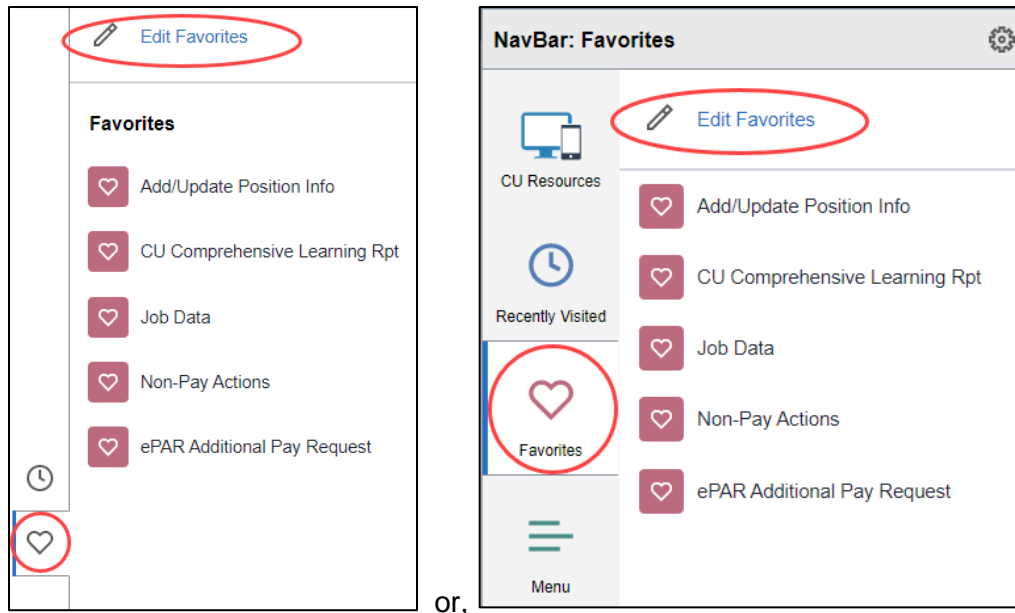


Figure 5: Job Data page showing Empl Record 0 of an active employee.

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, click **Home**  to return to the Employee Self Service dashboard.

# Accessing a Favorite Page

You can access and edit your favorites from either quick access bar or the NavBar as shown below.



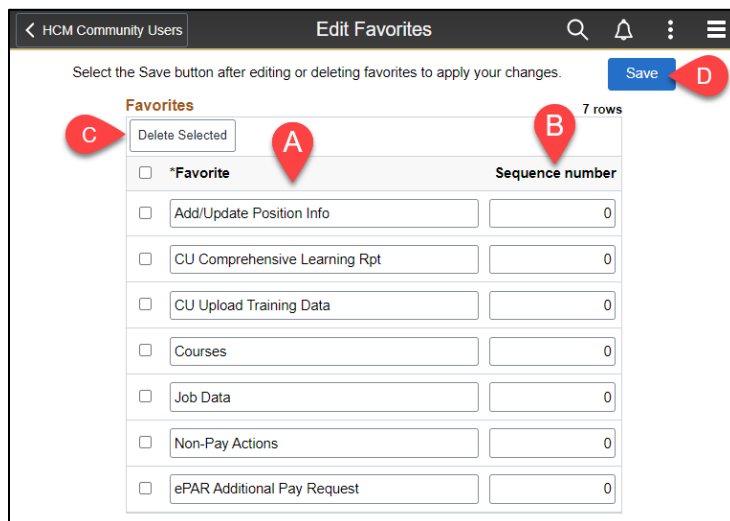
or,

Figure 6: Steps for selecting an HCM page saved as a favorite.

**Note:** When you are logged into the portal, but not in HCM, selecting Favorites displays portal favorites.

When editing your favorites, you can:

- A. Change the label.
- B. Update the display order by changing the sequence number.
- C. Delete a selected favorite.
- D. Save your changes.



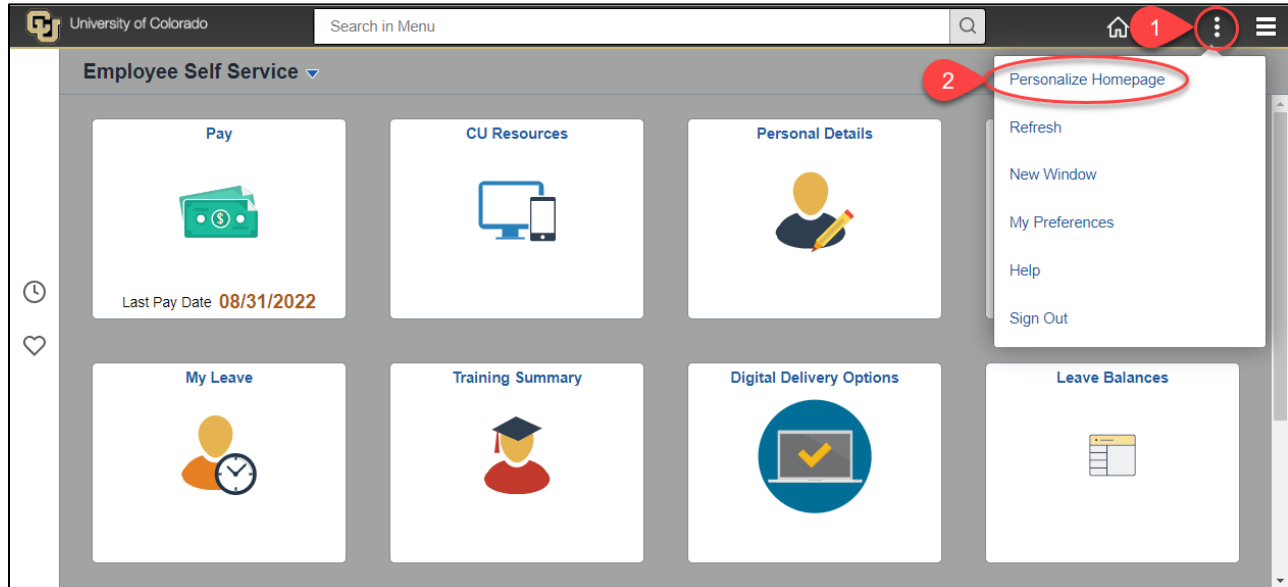


## Customizing Your Homepage

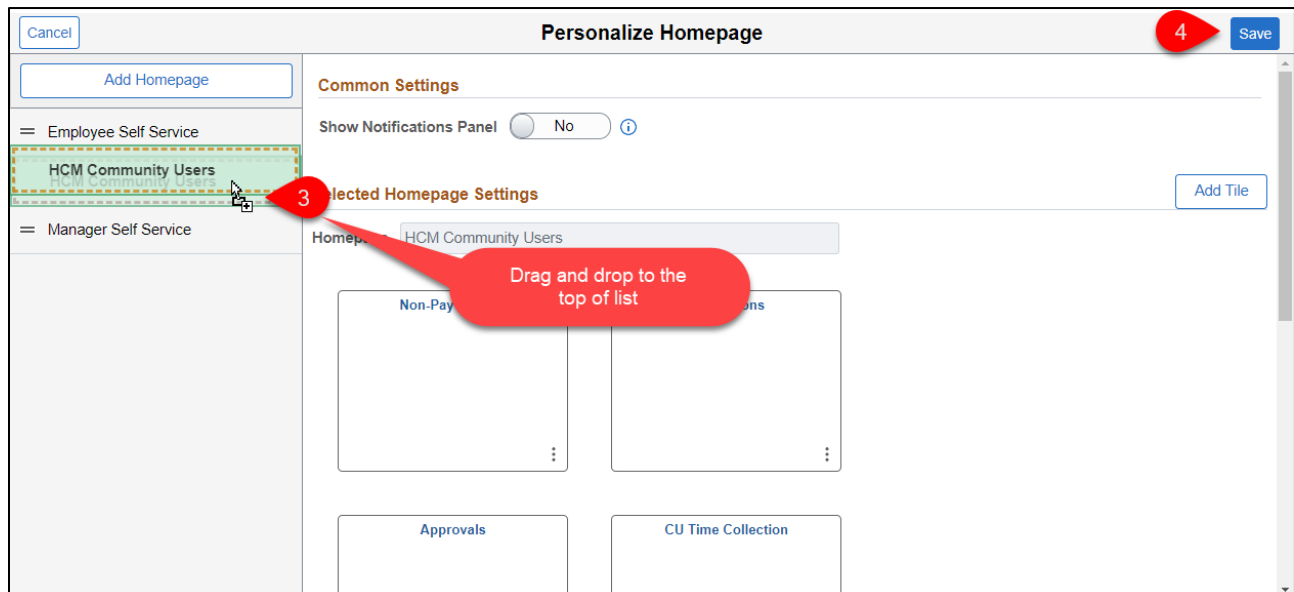
If you regularly use the HCM Community Users homepage, you can make it your default.

To customize your homepage:

1. Click the **Actions** menu.
2. Click **Personalize Homepage**.



3. From the Personalize Homepage window, drag and drop the homepage you want to be your default when you click the Home icon to the top of the list.



4. Click **Save**.

## 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. From the HCM Community Users homepage, click the **HCM WorkCenter** tile. The HCM User WorkCenter appears.
2. 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).

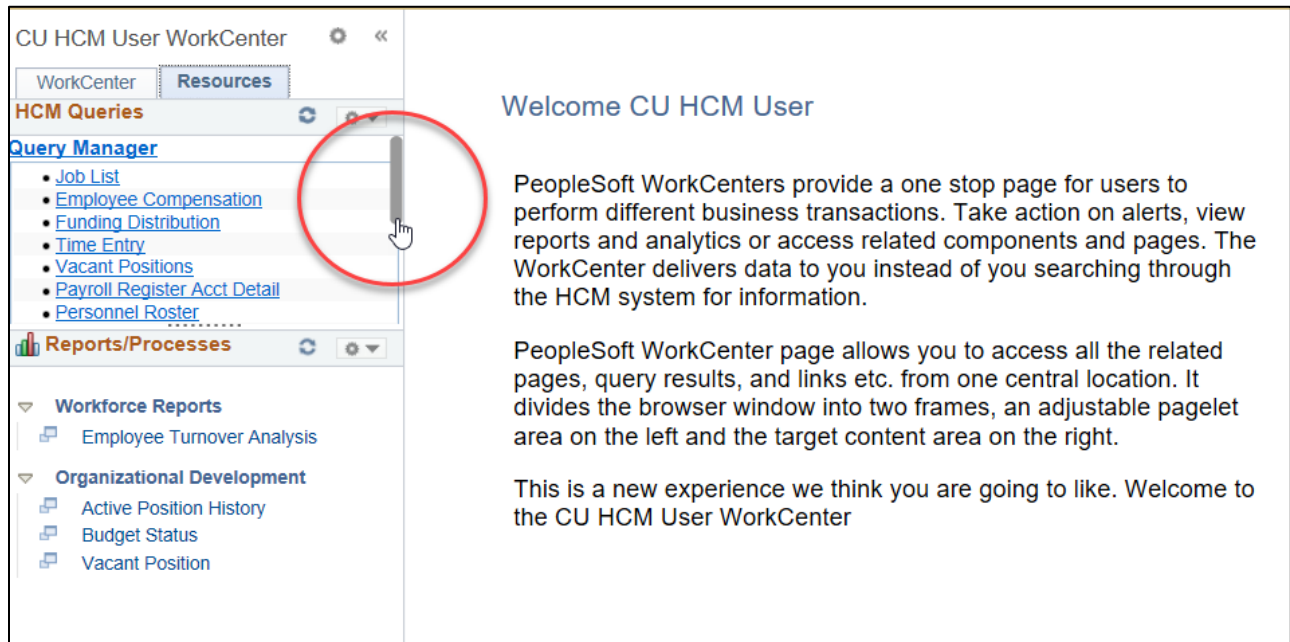


Figure 7: The HCM User WorkCenter provides access to queries and other useful reports.

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

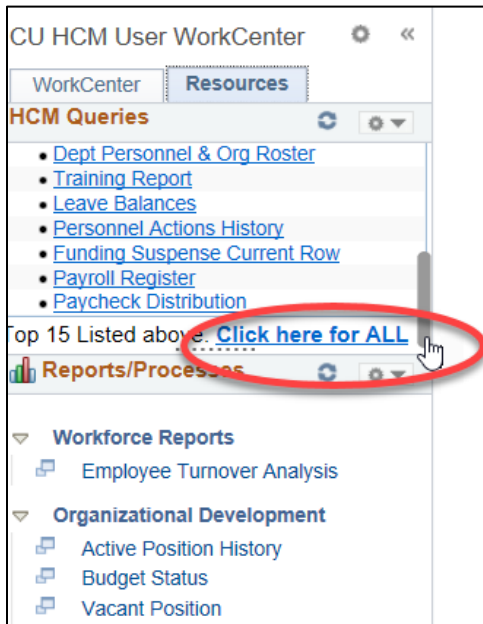


Figure 8: HCM Queries section lists the 15 most used queries; scroll down to bottom to access all queries.

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

4. 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):

5. 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.

6. 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 (such as [Disabling Pop-Up Blockers and Clearing Cache Job Aid](#)), frequently asked questions (FAQs), and the regularly updated [HCM Glossary](#). 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.

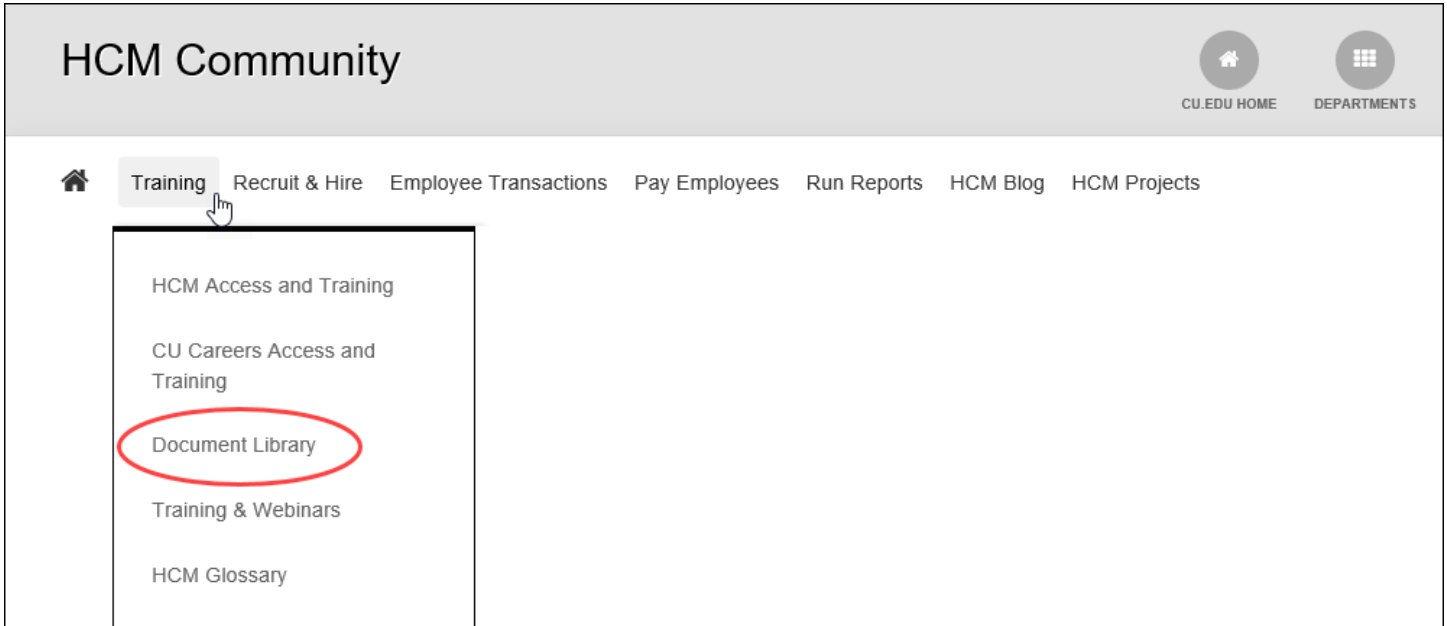


Figure 9: The HCM Community page, which offers more information and the document library.