

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.

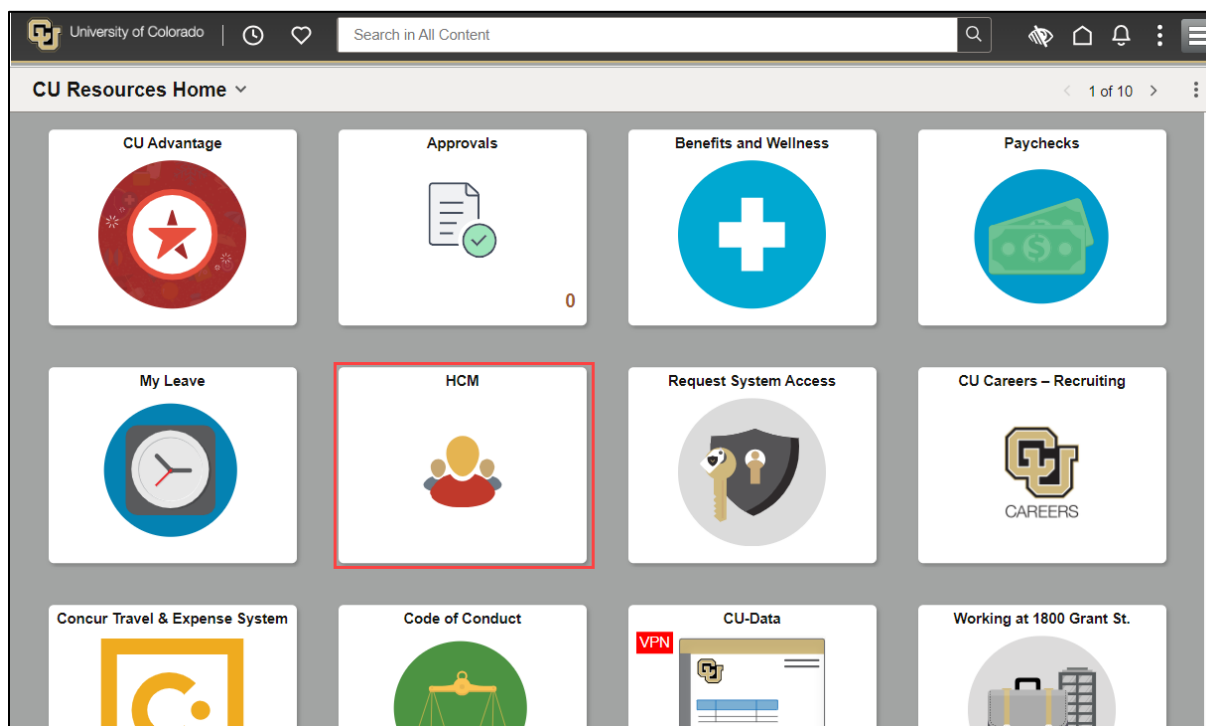


Figure 2: Employee portal homepage. You may see different content based on your campus and permissions.

HCM opens to the Employee Self Service dashboard:

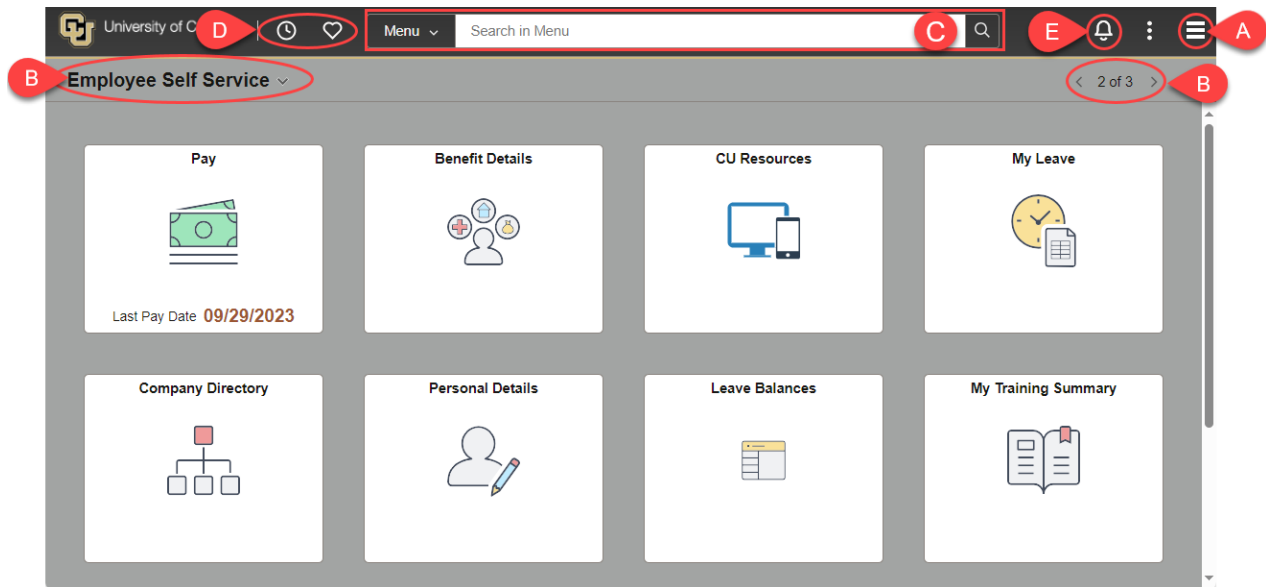
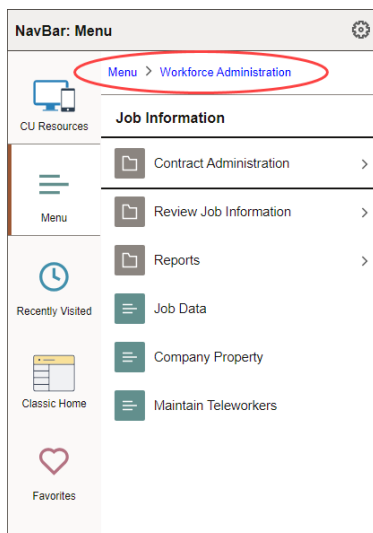


Figure 3: HCM Employee Self Service dashboard.

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 this menu.
- 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.

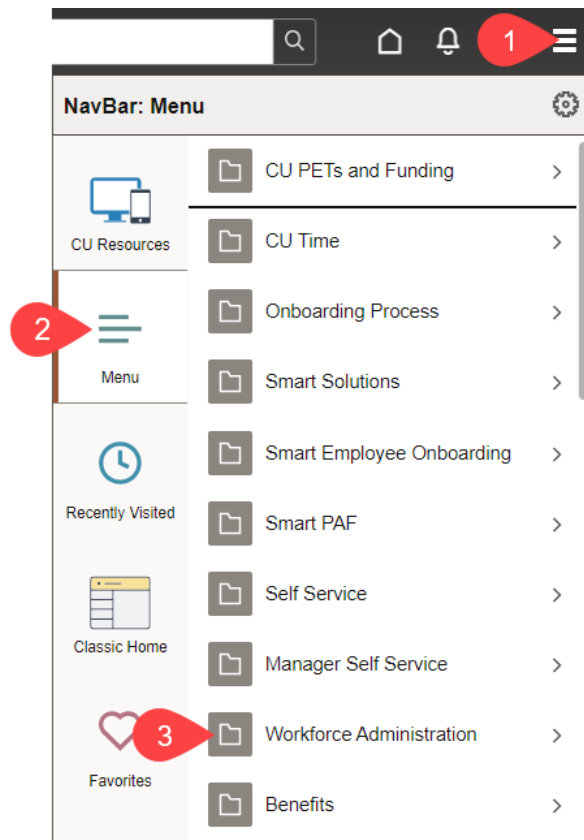
- D. To the left of the Search in Menu field, quick access buttons appear and provide one-click access to your most recently visited items (clock icon) and your favorites (heart icon).
- E. The bell icon in the top-right corner indicates notifications for you. It will appear with an exclamation point alerting you to new notifications.

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:

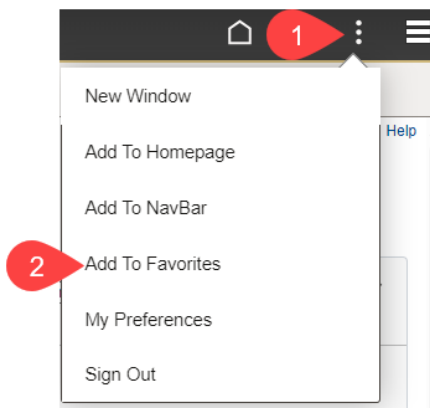
1. From the Employee Self Service page, select **NavBar**.
2. Select **Menu**.
3. Select **Workforce Administration**.
4. Select **Job Information**.
5. Select **Job Data**.



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** 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, and click **Search**.

The Search Results are displayed below the Search Criteria:

Job Data

Find an Existing Value

Search Criteria

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

Recent Searches: Choose from recent searches | Saved Searches: Choose from saved searches

Empl ID: begins with 274

Empl Record: =

Name: contains

Last Name: begins with

Second Last Name: begins with

Alternate Character Name: begins with

Middle Name: begins with

[Show fewer options](#)

☐ Case Sensitive ☐ Include History

Search **Clear** **Save Search**

Search Results

4 rows - Empl ID "274"

Empl ID	Empl Record	Name	First Name	Last Name	Second Last Name	Alternate Character Name	Middle Name	
274	0				(blank)	(blank)		>
274	1				(blank)	(blank)		>
274	2				(blank)	(blank)		>
274	3				(blank)	(blank)		>


Figure 4: Job Data Search Results.

Notice this employee has four Empl Records, 0 through 4. The 0 record is the current record. The other records are previous employment records that are no longer active.


8. 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.

The screenshot displays the 'Job Data' page for 'Empl Record 0'. The 'Work Location' tab is selected, showing details for an employee with 'HR Status: Active' and 'Payroll Status: Active'. The 'Effective Date' is 02/01/2023, and the 'Effective Sequence' is 0. The 'Action' is 'Pay Rate Change' with the 'Reason' being 'Base Pay - Increase in Pay'. The 'Job Indicator' is 'Primary Job'. Below this, the 'Position Number' is 00687308, and the 'Lecturer' title is shown. The 'Position Entry Date' is 08/17/2020, and the 'Position Management Record' checkbox is unchecked. Organizational details include 'Regulatory Region: USA', 'Company: CU', 'Business Unit: UCB', 'Department: 10889', 'Location: 1SMTH', and 'Establishment ID: CU'. The 'Last Start Date' is 08/17/2020, and the 'Expected Job End Date' is blank. The 'Date Created' is 01/26/2023. At the bottom, there are tabs for 'Job Data', 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation'.

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

9. 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.
10. 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 icon  or the NavBar as shown below.

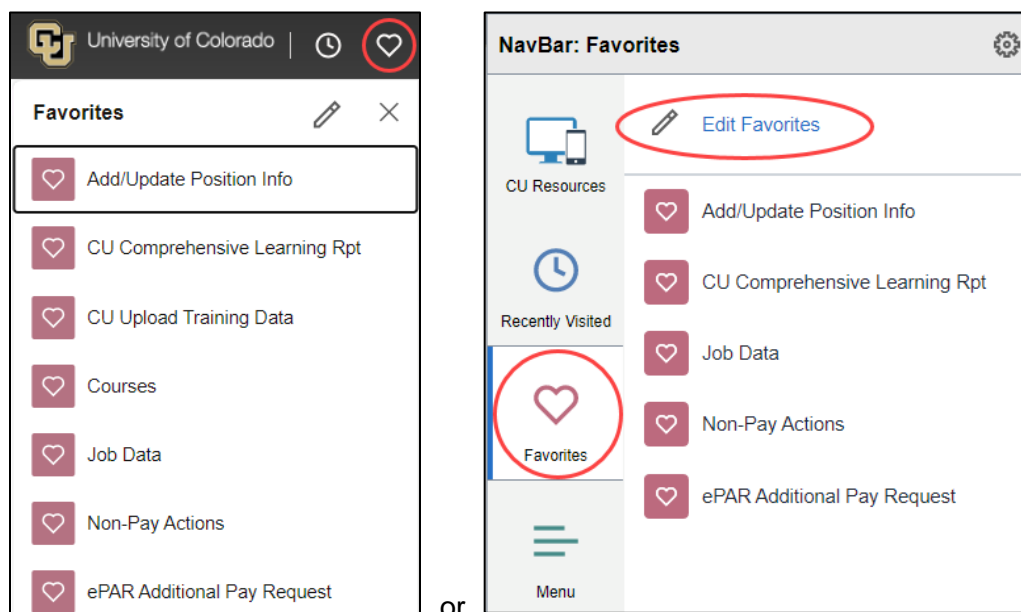
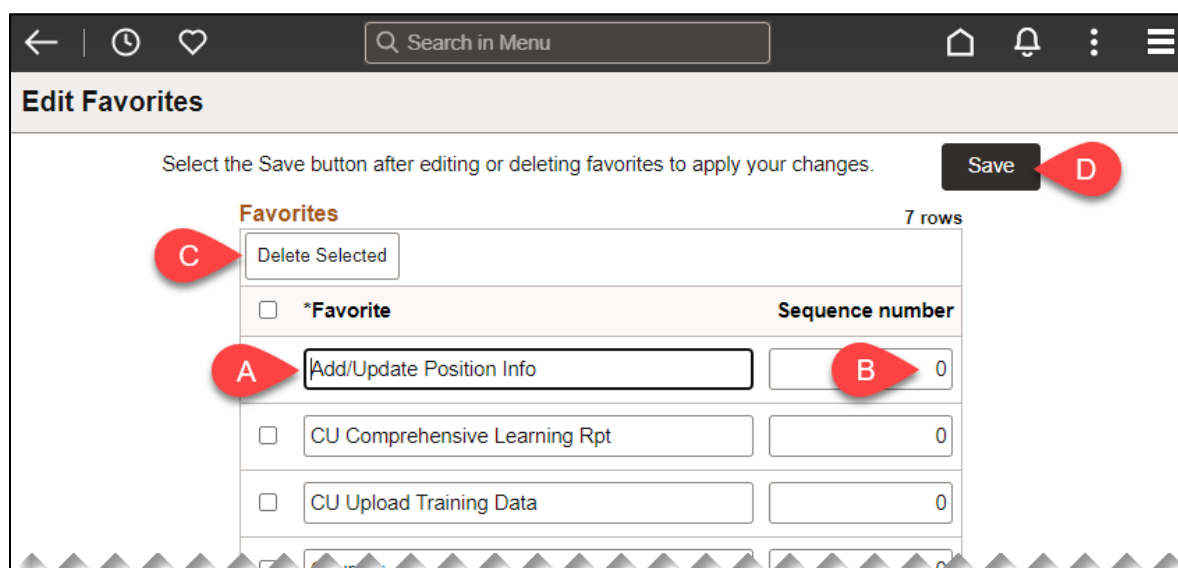


Figure 6: Steps for selecting an HCM page saved as a favorite.

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

When editing your favorites, you can:

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

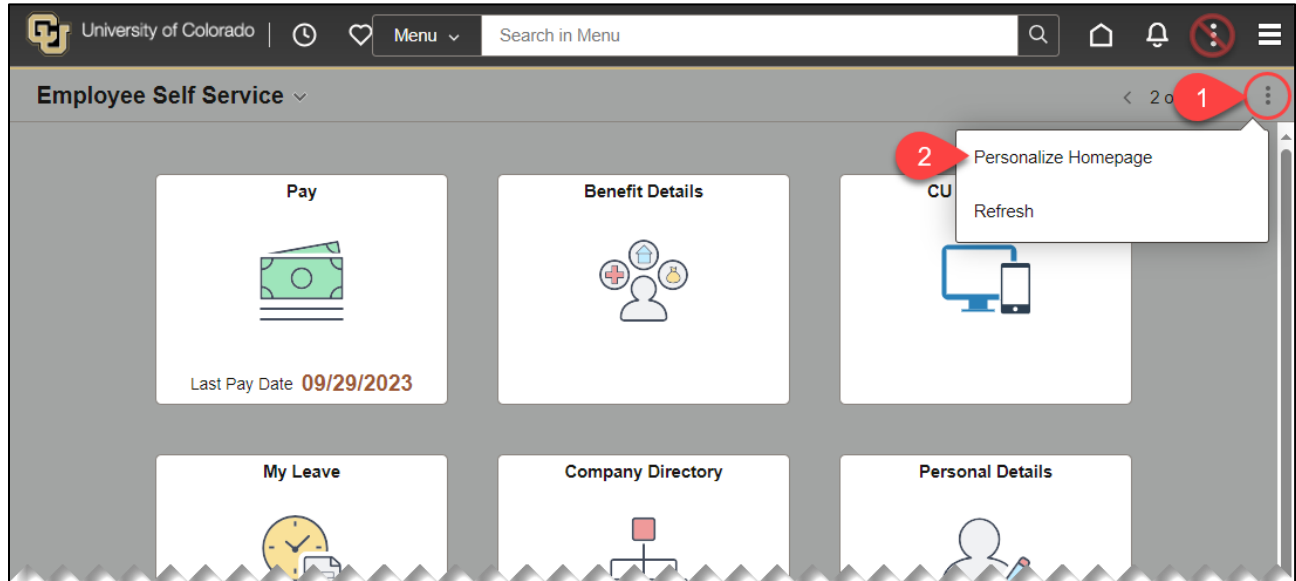


Customizing Your Homepage

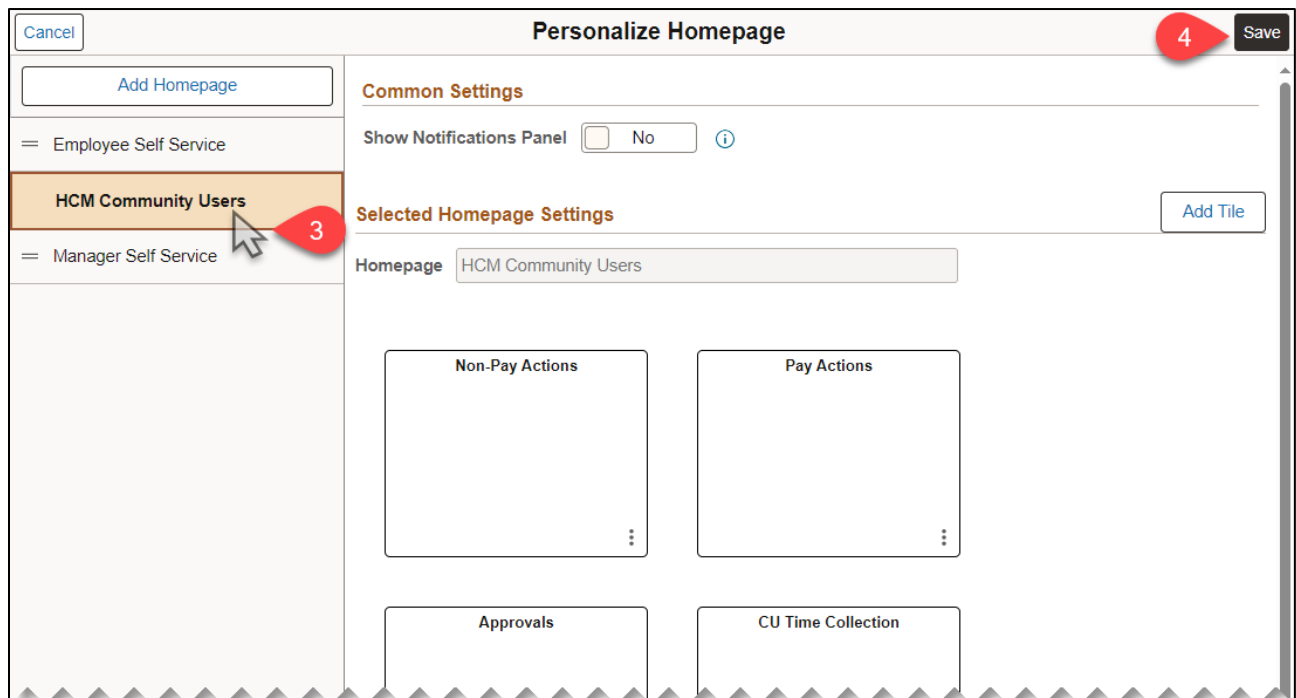
If you regularly use the HCM Community Users homepage, you can make it your default.

To customize your homepage:

1. Click the **Actions** menu for the homepage (not for the system).
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).

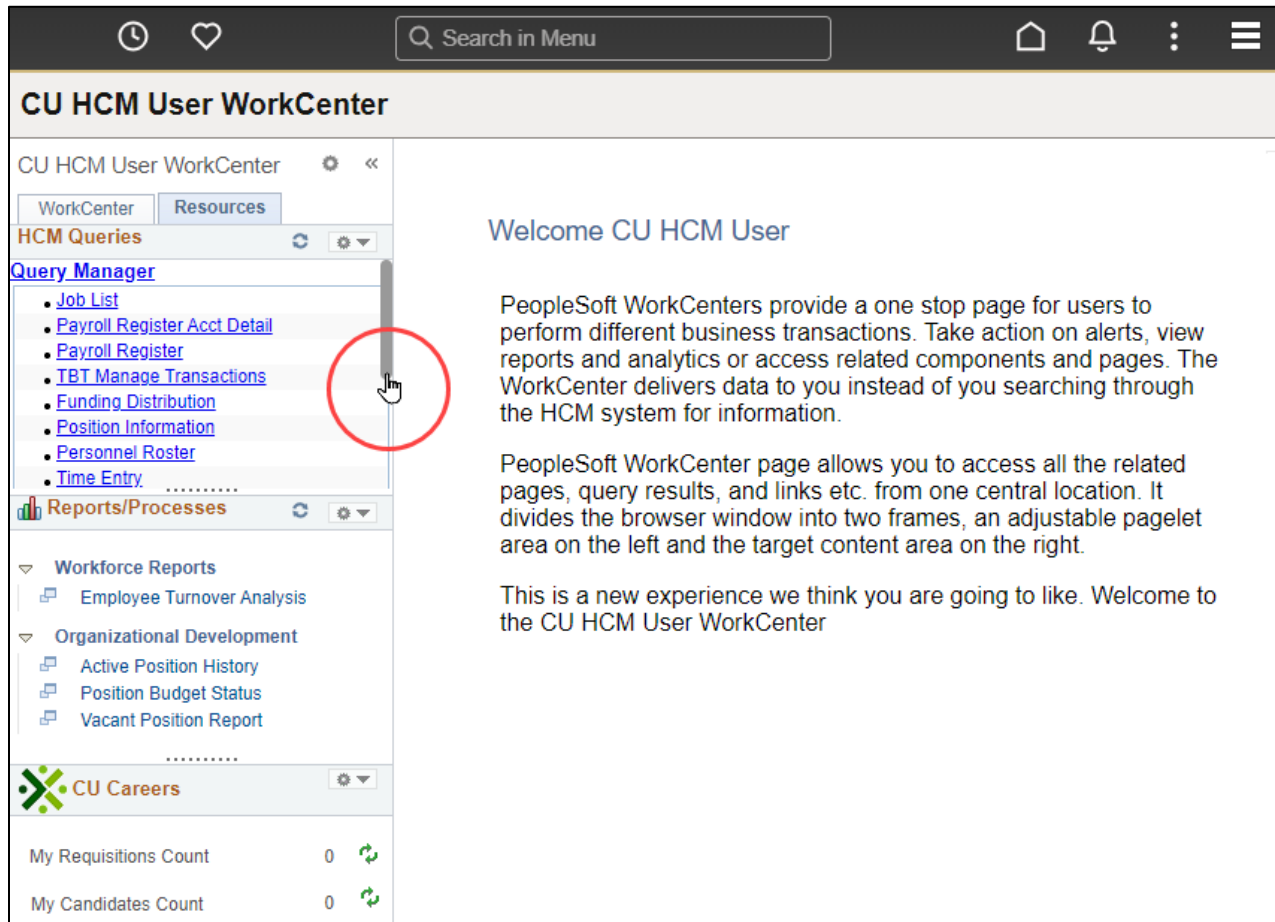


Figure 7: The HCM User WorkCenter provides access to queries and other useful reports.

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

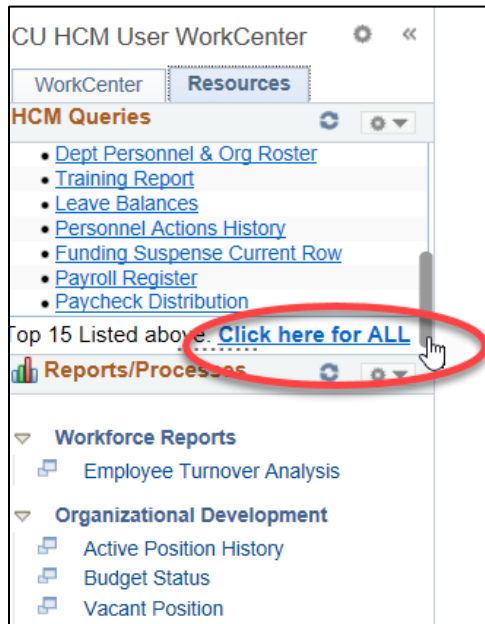


Figure 8: HCM Queries section lists the 15 most used queries; scroll down to bottom to access all queries.

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

4. Select the query, **Personnel Roster**. This query is listed as number 93 in the image below. As queries are added and removed in HCM, the number may change.

93	Personnel Roster	This query returns important job data for active employees, including supervisor information.	107284	CUES_HCM_PERSONNEL_ROSTER
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The system opens the query page for you to enter criteria.

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.

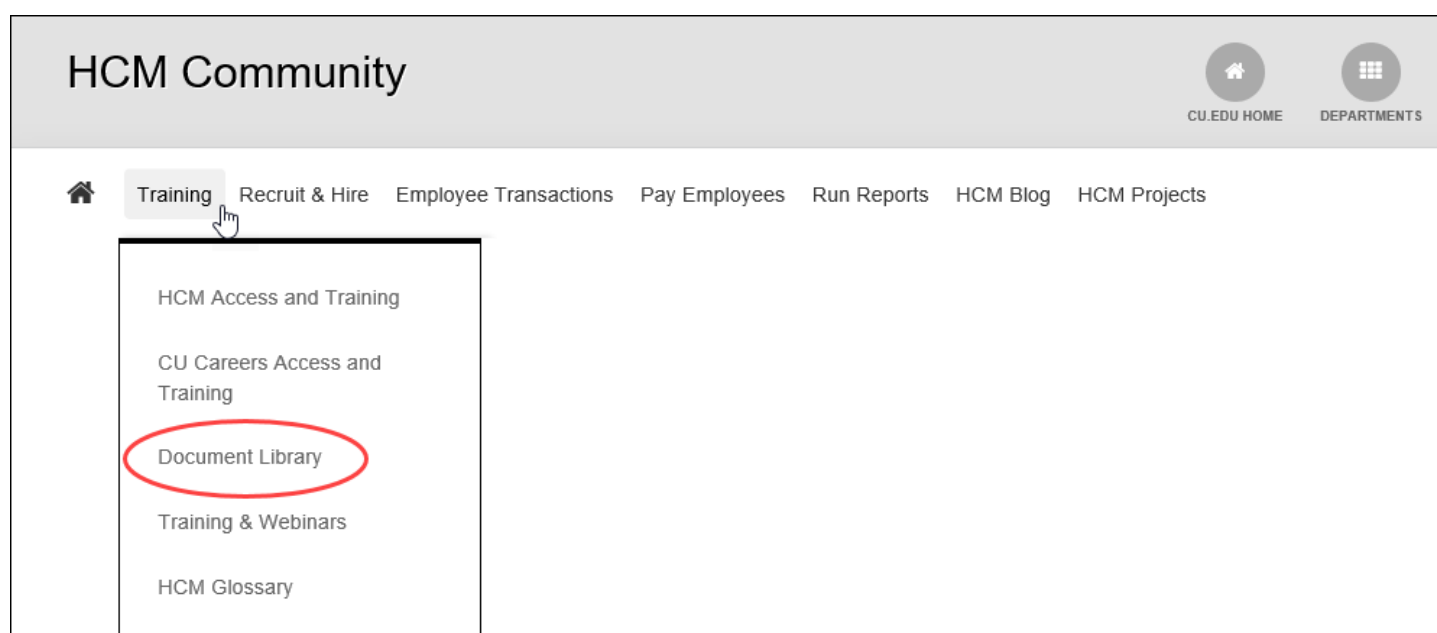


Figure 9: The HCM Community page, which offers more information and the document library.