BP.010.011 – IMPORTING HCM DATA

Purpose	To import Position, Job, and Funding data into Budget Prep from OneUSG Connect.
Description	The HCM Import process populates Budget Prep tables using HR data from OneUSG Connect. Users have the option to import all data or to select a subset of positions for subsequent imports.
Security Role	**BOR_BP_PROCESSES**
Dependencies/ Constraints	• User completed all Budget Prep Setup steps. • The HCM Import option for "All Departments" can only be selected once per budget year. Subsequent imports will be limited to ranges of departments or individual positions.
Additional Information	None

Procedure

Below are complete step-by-step instructions on completing the HCM Import for Budget Prep Processing.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Menu** icon.
3.	Click the **BOR Menus** link.
4.	Click the **BOR Budget Prep** link.
5.	Click the **Budget Prep Processing** link.
6.	Click the **HCM Import** link.
7.	The Run Control ID page opens. Add a new value or use an existing **Run Control ID**.
8.	Select either the **Create Report** or **Create Report/Run HCM Import** option. *Note: if users select the Create Report/Run HCM Import this option both creates the report and updates the database.*
9.	Enter the appropriate Business Unit in the **Business Unit** field.
10.	Enter an **As of Date**. The As of Date will be the maximum effective date for any imported HR Data.
11.	Select **All Departments**, pick a range of departments to import using the **From Department** and **To Department** fields or select a **Position Number** to import. *Note: users should select All Departments the first time this process runs. The All Departments option will not be selectable if the HCM Import was previously run with this option for the Budget year being developed. The From Department and To Department range or Position number can be used if data needs to be updated or re-imported for any reason.*
12.	Select **Budgeted Positions Only** to limit the import to only include positions with the Budgeted Position option selected on Add/Update Position Info. This option can also be left unselected to import all positions within the range defined in step 11.
13.	Click the **Run** button. The Process Scheduler Request page opens.
14.	Verify default values pre-populate.
15.	Click the **OK** button. The system navigates to the HCM Import page.
16.	Click the **Process Monitor** link.
17.	Click the **Refresh** button. Select Refresh until the Run Status displays as 'Success' and the Distribution Status displays as 'Posted.'

Step	Action
18.	Click the **Details** link to view the Process Detail.
19.	Click the **View Log/Trace** link.
20.	Review the .out format file for a list of any positions that failed to import – salary and incumbent data for these are not included in Budget Prep until corrections are made to Job data.
21.	Review the .out format file for a list of any positions with 0 FTE. These positions are imported and can be included in Budget Prep as normal, but corrections may need made in Job or Position data.