



# HCM Extracts Content and Audit Guidelines

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Version 1.0 | February 16, 2017

*This job aid lists the information on the HCM extracts and where it originates in HCM. You will use these guidelines to compare the extracts with your HCM data.*

## **EMPLOYEES (from JOB record):**

1. Job Indicator = P (Primary Job)
2. Includes exception hourly employees (Employee Type E)
3. Excludes employees where the latest action date has the Pay Status of TER (Terminated)

## **POSITIONDATA:**

1. Include positions that are tied to an exception hourly employee
2. Include vacant positions where Reason Code does not equal INV (Inactive)

## **EMPLINFO:**

1. Includes all employees in the EMPLOYEES file
2. Columns:
  - a. Point-of-View:
    - i. Site: Department ID on POSITION record
  - b. Employee Number
  - c. Employee Name
  - d. FT/PT: Full/Part on POSITION record
  - e. Employee Type: Regular/Temporary on POSITION record
  - f. Pay Type: FLSA status on POSITION record
  - g. Union Code: EMPL CLASS on JOB record
  - h. Location Code: Location on POSITION record
  - i. Hire Date: Last Start Date on JOB record
  - j. Annual Salary Spread: number of months checked on SDCOE Job Data tab
    - i. Where 12 months = Average
    - ii. Where 11 months = Custom
    - iii. Where 10 months = Ten\_Months
    - iv. Where 9 months = Nine\_Months

## **POSITIONINFO:** include all positions in the POSITIONDATA file

1. Point-of-View:
  - a. Site: Department ID on POSITION record
2. Position Number
3. Position Name
4. Position Type:
  - a. Max head count = 1: Single\_Incumbent
  - b. Max head count >1: Pooled
5. Job: Job Code on POSITION record
6. Position Start Date: Budget Begin Date on the Department Budgets page
7. Position End Date: blank
8. Location Code: Location on POSITION record
9. Union Code: EMPL CLASS on JOB record
10. Adjustment Date: blank



11. Salary Basis: Annual
12. Annual Salary Spread: number of months checked on SDCOE Job Data tab
  - a. Where 12 months = Average
  - b. Where 11 months = Custom
  - c. Where 10 months = Ten\_Months
  - d. Where 9 months = Nine\_Months
13. Default Weekly Hours: Standard Hours on POSITION record

**EMPLPOSINFO:** Includes exception hourly (Employee Type E)

1. Point-of-View:
  - a. Site: Department ID on POSITION record
2. Position Number
3. Position Name:
4. Position Type:
  - a. Max head count = 1: Single\_Incumbent
  - b. Max head count >1: Pooled
5. Job: Job Code on POSITION record
6. Position Start Date: Budget Begin Data on the Departments Budget page
7. Position End Date: blank
8. Employee Number
9. Employee Name
10. Employee Type: Regular/Temporary on POSITION record
11. Union Code: EMPL CLASS on JOB record
12. Location Code: Location on POSITION record
13. Pay Type FLSA status on POSITION record
14. FT/PT: Full/Part on POSITION record
15. Hire Date: Last Start Date on JOB record
16. Adjustment Date: blank
17. Salary Basis: Annual
18. Annual Salary Spread: number of months checked on SDCOE Job Data tab
  - a. Where 12 months = Average
  - b. Where 11 months = Custom
  - c. Where 10 months = Ten\_Months
  - d. Where 9 months = Nine\_Months
19. Default Weekly Hours: Standard Hours on POSITION record

**FTEINFO**

1. Point-of-View:
  - a. Site: Department ID on POSITION record
2. Proposed FTE:
  - a. Positions with FTE: FTE on POSITION record
  - b. Exception Hourly:

$$[(^1\text{Number of days worked}) \times (^2\text{Number of hours worked per day})]/2080$$

<sup>1</sup>Number of days worked—from Employee's assigned Holiday Schedule found on JOB record.

<sup>2</sup>Number of hours worked per day—Employee's Assigned Work Schedule.

3. FTE Start Date: 07-01 of budget year
4. FTE End Date: blank



## **SALGRINFO**

1. Point-of-View:
  - a. Site: Department ID on POSITION record
2. Salary Grade Type Input: Grade\_Step
3. Grade Salary Basis Input: Annual
4. Grade Step: Step on JOB record
5. Grade Sequence: blank
6. Option Value:
  - a. NAANNL: Comp Rate on JOB record
  - b. NAHRLY: Comp Rate on JOB record multiplied by 2080
7. Option Start Date: Step Entry Date on JOB record
8. Option End Date: blank
9. Allow Value Change Input: Yes
10. Override Option Value:
  - a. NAANNL: Comp Rate on JOB record
  - b. NAHRLY: Comp Rate on JOB record multiplied by 2080

## **COMPINFO**

1. Point-of-View:
  - a. Site: Department ID on POSITION record
2. Options:
  - a. BEN elements only
  - b. Coverage or Participation
3. Required Element Input: Compensation Element default
4. Taxable Component: Compensation Element default
5. Payment Frequency Input: Compensation Element default
6. Payment Terms Input: Compensation Element default
7. Maximum Value: Compensation Element default
8. Option Value
  - a. BEN: Employer Rate
  - b. ERN:
    - i. %: Percent on JOB record
    - ii. \$: Comp Rate on JOB record divided by the number of months on the SDCOE Job Data
  - c. TAX: Employer Rate
9. Override Option Value
  - a. BEN: Employer Rate
  - b. ERN:
    - i. %: Percent on JOB record
    - ii. \$: Comp Rate on JOB record divided by the number of months on the SDCOE Job Data
  - c. TAX: Employer Rate
10. Option Start Date
  - a. Elements where Option Value is a percentage: 07-01 of Budget Year
  - b. Elements where Option Value is an amount: Override Deductions (Employee)
11. Option End Date: blank
12. Earning Type Input: Compensation Element default
13. Value Type Input: Compensation Element default
14. Allow Value Change Input: Yes



## **ALLOCINFO**

1. Point-of-View:
  - a. Site: Department ID on POSITION record
2. Chartfields: current fiscal year Department Budget Table USA record where the Department Budget Table USA Department ID matches the POSITION Department ID.
  - a. Account Segment: Object
  - b. Entity Segment: Site
  - c. Fund Segment: Fund
  - d. Program Segment: Function
  - e. Project Segment: Resource
  - f. Goal Segment: Goal
  - g. PY Segment: Project Year
  - h. OperUnit Segment: Operating Unit
3. Allocation Start Date: July 1 of Budget Year
4. Allocation End Date: blank
5. Percentage Allocation: Distribution on Department Budget Table USA