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website: budget.berkeley.edu/systems/calplanning
contact: calplanhelp@berkeley.edu

Photo Credit:
Elena Zhukova
Welcome

Congratulations! You now have access to CalPlanning, UC Berkeley’s financial planning and analysis tool which can be used at any campus level.

What you can do in CalPlanning:
1. Create Operating Budgets and Forecasts for your unit
2. Run financial reports to review and analyze Budget and Actuals data

Learning More About CalPlanning

To learn more about CalPlanning, please visit the CalPlanning website which includes information about:

- News and alerts
- Training and job aids
- Help Desk and unit support contact information
- Monthly release notes
- Scheduled updates
- CalPlanning application availability
CalPlanning Getting Started Guide

CalPlanning Roles

There are three types of roles available for our CalPlanning users- Planner, HCPRptg Reporter and CalRptg Reporter. Your role determines the access you will have to the different CalPlanning tools.

**Planners**

Planner roles have access to CalPlan, CalRptg, HCP and HCPRptg. Planners input and analyze unit financial plans into our planning tool CalPlan and Human Capital Planning (HCP). They run and analyze canned reports in CalRptg and HCPRptg. They utilize Smart View in MS Excel for ad hoc queries of plan and actual data from CalRptg and HCPRptg data cubes.

**Reporting**

Reporting roles have access to both CalRptg and HCPRptg. They run and analyze CalRptg and HCPRptg reports. They can also utilize Smart View in MS Excel to create ad hoc queries of plan and actual data from CalRptg and HCPRptg data cubes.

**CalRptg**

CalRptg roles have access only to CalRptg. They run and analyze canned CalRptg reports. They can also utilize Smart View in MS Excel to create ad hoc queries of plan and actual data from the CalRptg cube.
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CalPlanning Tools

CalPlanning has two planning applications:

- CalPlan
- Human Capital Planning (HCP)

and three reporting applications:

- CalRptg
- HCPRptg
- Smart View

CalPlan

CalPlan is a planning tool that provides a summarized view of financial data and the ability to Forecast and create an Operating Budget using data entry screens, automated calculations, reporting, and task lists to guide users through planning steps and workflow. CalPlan users have unit specific editing access.

Human Capital Planning (HCP)

HCP is a compensation planning tool that provides the ability to Forecast and create an Operating Budget using Employee and Position data. HCP users have unit specific editing access.

CalRptg

CalRptg is a reporting tool that provides access to detailed financial budget and actual data. CalRptg includes pre-defined report templates and utilizes CalRptg Chart of Accounts (COA), including all BFS COA values. CalRptg users have global read-only data access.

HCPRptg

HCPRptg is a reporting tool that provides access to detailed compensation expense data. HCPRptg users have unit specific read-only data access.

Smart View

Smart View allows our finance staff to view, import, manipulate, distribute and share CalPlan and HCP Operating Budget and Forecast data as well as Actuals in Microsoft Excel, Word and PowerPoint. Smart View users have global read-only data access.
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CalPlanning Tool Integration and Data Flow

CalPlanning data flows through its related applications, on a regularly scheduled basis. Check the CalPlanning website for the current data push schedule.

Below is a chart that outlines data flow within CalPlanning tools and from BFS and HCM into CalPlanning.

*Data push timing varies from every three hours to every hour between 9:00am and 9:00pm. Check [http://budget.berkeley.edu/systems/calplanning](http://budget.berkeley.edu/systems/calplanning) for the current data push schedule.*
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Training Resources

Classroom Training

Learn about available training on CalPlanning by visiting the CalPlanning website’s “Training” page at: http://budget.berkeley.edu/projects/calplanning/training

There are currently five CalPlanning classes offered for new hire finance staff.

1. **Budget Process Tools: Introduction To CalPlanning** (COURSE CODE: BESPM009)
   This discussion session is for both new hire (start date >= 2/01/2015) Planners and new Reporting users and is a prerequisite for all of the CalPlanning tool training for new hires. During this two hour lecture session we will:
   - Define CalPlanning tools and key concepts
   - Map out the integration and data flow timing of CalPlanning tools and our other campus systems
   - Review the SRECNA report layout and components
   - Identify CalPlanning and Budget Process resources available to our finance members

2. **Budget Process Tools: CalPlanning Reporting** (COURSE CODE: BESPM001)
   This class is for both new hire (start date >= 2/01/2015) Planners and Reporting users. The prerequisite for this class is the **Budget Process Tools: Introduction To CalPlanning**. During this three hour computer lab training session we will:
   - Define the CalRptg canned reporting tools and key concepts
   - Identify and practice the steps to create, save, print and analyze canned CalRptg reports
   - Review recommended CalRptg resources and job aids to assist in the FY2016-17 Budget Process

3. **Budget Process Tools: Creating a Unit Plan Navigating CalPlan** (COURSE CODE: BESPM002)
   This class is designed for new hire (start date >= 2/01/2015) Planners who are responsible for creating unit financial budgets. The prerequisite for this class is the **Budget Process Tools: Introduction To CalPlanning Reporting**. During this three hour computer lab training session we will:
   - Define the CalPlan tool and CalPlan canned reporting tools and key concepts
   - Identify and practice the steps to create a unit budget utilizing the CalPlan task list, data forms and CalPlan reports
   - Review recommended CalPlan resources and job aids to assist in the FY2016-17 Budget Process
   This class is designed for Planners who are responsible for creating compensation plans for their unit budgets. The prerequisite for this class is the **BUDGET PROCESS TOOLS: CREATING A UNIT PLAN NAVIGATING CALPLAN**. During this three hour computer lab training session we will:
   - Define HCP and HCPRptg tools and key concepts
   - Identify and practice the steps to create a unit compensation budget utilizing the HCP task list, data forms and HCPRptg reports
   - Review recommended HCP resources and job aids to assist in the FY2016-17 Budget Process

5. **Smart View Ad Hoc Basics** (COURSE CODE: BESPM007)
   This class is designed for Financial Planners and Reporting users who have attended the CalPlan and Reporting classes. The prerequisite for this class is the **BUDGET PROCESS TOOLS: INTRODUCTION TO CALPLANNING REPORTING**. During this three hour computer lab training session we will:
   - Define the Smart View Ad Hoc in MS Excel
   - Identify and practice the steps to create an Ad Hoc analysis of plan data from CalRptg
   - Review recommended Smart View resources and job aids to assist in the FY2016-17 Budget Process

**Recommended Training for Reporting Only vs. Planner Role**
Based on your CalPlanning role we recommend that you take the following classes:

- HCPRTg and CalRptg Reporting roles should enroll in Classroom Training #1, #2 and #5
- Planners should enroll in all Classroom Trainings #1 through #5

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How to Register for Classes

You can access direct links to enroll in available training classes at

http://budget.berkeley.edu/projects/calplanning/training

or REGISTER for classes at the UC Learning Center via the Blu website.

1. Log into Blu at blu.berkeley.edu
2. Under the “Self Service” tab on the left, click “UC Learning Center”
3. Once in the UC Learning Center, in the search bar type in the name of the CalPlanning class you want to register for (or type “CalPlanning”)
4. Click on the name of the class you are registering for
5. Click on “Register”

Job Aids

CalPlanning Job Aids are instructional documents that walk you through the different steps of the Budget Process and CalPlanning application access and functionality.

Job Aids are grouped by CalPlanning tool on the CalPlanning website

http://budget.berkeley.edu/systems/calplanning/job-aids

Helpful Tip: Training Class Slide Presentations and Exercise Guides

If you are new to CalPlanning, check out the Exercise Guides on the Training page. These will walk you through the basics of using the CalPlanning applications.

http://budget.berkeley.edu/systems/calplanning
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Accessing CalPlanning Tools

Logging in to CalPlanning
There are two ways to access CalPlanning:

1. Citrix

The easiest way to access CalPlanning is through Citrix. You can find information about how to access via Citrix on the CalPlanning website.

2. Browser Access

You can access CalPlanning directly via your browser if you have a supported browser version, as well as set your browser and CalPlanning default settings. Compatible browsers and instructions are listed on the CalPlanning Getting Started page. After following those instructions and setting your browser, click on the “CalPlanning Login” button on the right of the home screen.

CalPlanning User ID

Your CalPlanning user ID and password will be your CalNet ID and password.

Getting CalPlanning Help

Non-Technical Questions
Your Local CalPlanning Support person is your primary contact for non-technical questions related to CalPlanning and your department’s planning process.

Technical Questions
You can contact the Help Desk for technical CalPlanning questions. You can contact the CalPlanning Help Desk within CSS IT for technical questions. If they cannot resolve the issue, they will escalate it to the CalPlanning team.

CalPlanning Help Desk: calplanhelp@berkeley.edu