University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus
EMPLOYEE SERVICES

Human Capital Management (HCM): Step-by-Step Guide

Creating a Position with Funding

This guide describes how to create a position in HCM. Creating a position involves defining position information, salary plan information, percentage of time, and other specific details. Also, when creating a position, HCM will display the CU Funding Entry page for you to enter funding information. While the position is connected to a non-person profile (NPP), which acts as the job description, creating or updating an NPP is a separate process.

After a new position is submitted, HCM automates the workflow process to ensure the necessary approvals are obtained. Informational messages may appear, allowing you to make corrections before data is committed to the HCM tables.

After a position is approved, the data for the position is written to HCM tables and an employee (existing, former, or a new hire) can be assigned to it.

For More Information:

- About NPPs, refer to *Creating or Updating a Non-Person Profile (NPP) Step-by-Step Guide*.
- About assigning an employee to a position, refer to *Hiring an Employee Step-by-Step Guide* and *Transferring an Employee Step-by-Step Guide*.
- About updating a specific position, refer to *Updating a Position Step-by-Step Guide*.

Contents

Before You Begin

Before you begin, you should have the following information:

- Position number of the Reports To supervisor associated with the new position.

  The Reports To field is the position number of the supervisor to which the position you are creating reports to. If you are planning to recruit for this position in CU Careers, then the Reports To field must have a value and an incumbent in that position. If you are not using CU Careers, there only needs to be a Reports To position and an incumbent is not required.

- The effective date of your position, which can be the default of today's date, or a past date, or a future date. If you are planning to have HCM feed the position to CU Careers for posting a requisition, the Effective Date must equal today's date or earlier (it cannot be future dated).
- Keep in mind the hire date for the employee you will eventually hire should be a date **later** than the effective date of the position.
- Information specific to the position you are creating: Business Unit, Job Code, Regular or Temporary, Full-Time or Part-Time, and Department code.
- Positions have a default Title associated with the Job Code. If you are updating the Title to a working title, you should know what it will be.
- Department Budget Table (DBT) information for funding:
  - The active SpeedType of the fund (or funds) being used for this position.
  - Distribution of the funding (amount or percentage). For example, your department may want to allocate a fixed amount to a SpeedType, and the remaining amount to another SpeedType. You can specify a fixed amount and then the percentage will calculate accordingly. The total allocation across SpeedTypes must always equal 100%.

Navigation tips:

▾ HCM Community Users

Procedures in this guide begin from the HCM Community Users dashboard:

1. From the portal, click the **HCM** tile. The Employee Self Service dashboard appears.
2. Click **Employee Self Service**.
3. Click **HCM Community Users** to display the dashboard.

The NavBar displays options for accessing other pages and systems. Through the NavBar, you can select CU Resources to access systems on the portal.

The looking glass is called a look up and displays search results for you to select valid field values.

The book and checkmark let you spell check text boxes.

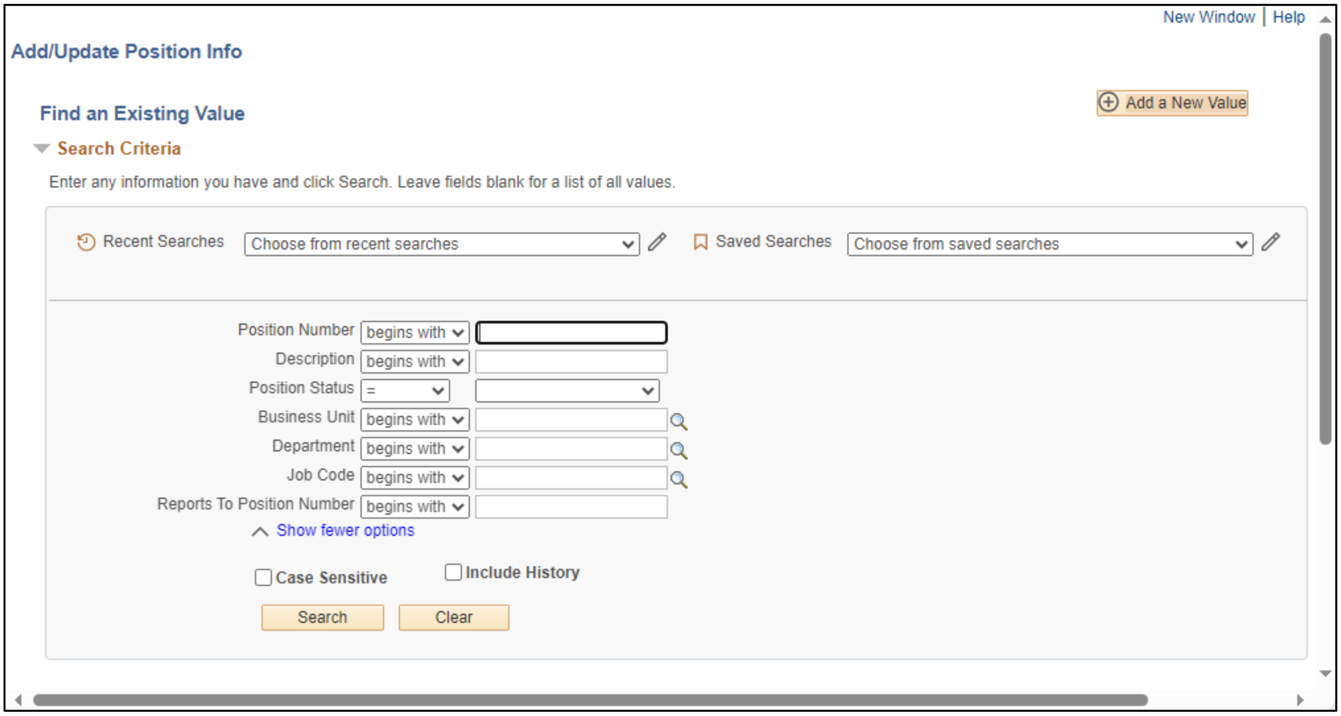
The down arrow lets you hide, or collapse, sections you do not want to view.

Click the arrow to expand the section.

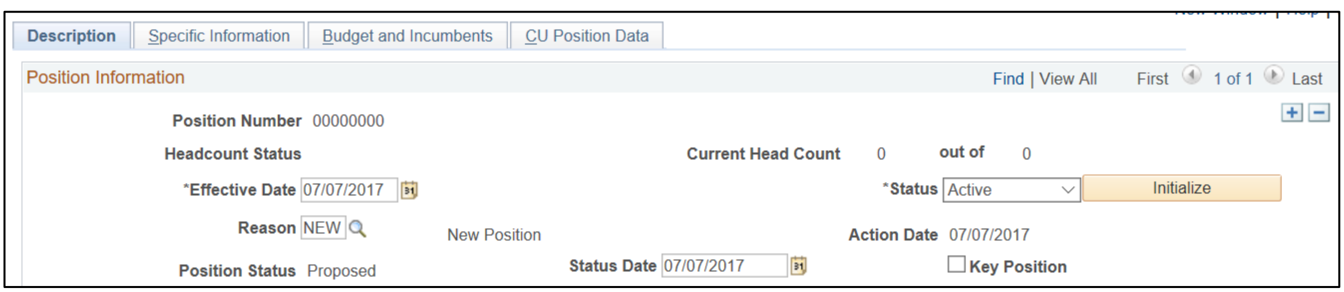
Creating a Position

To create a position:

1. From the HCM Community Users dashboard, click the **Non-Pay Actions** tile.
2. From the menu on the left, select **Position Management**> **Add/Update Position Info**.
   The Add/Update Position Info page appears:



3. Click the **Add a New Value** button. The system displays a default Position Number of 00000000. HCM will assign a unique position number after you save your request.
4. Click **Add**. The Position page appears at the Description tab.

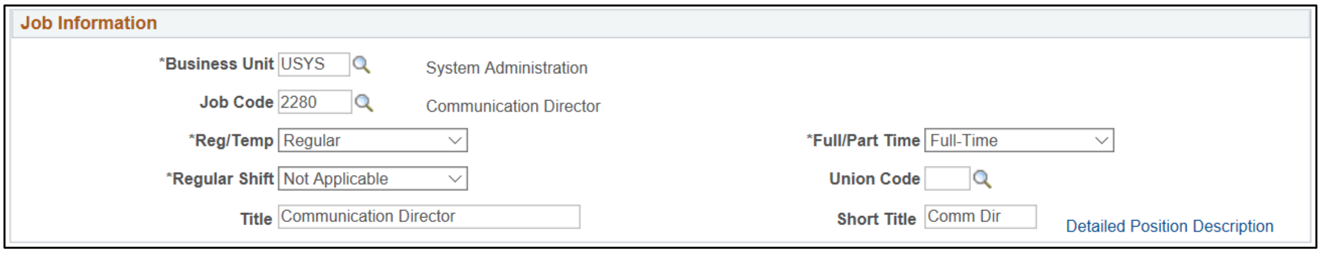


Notes:

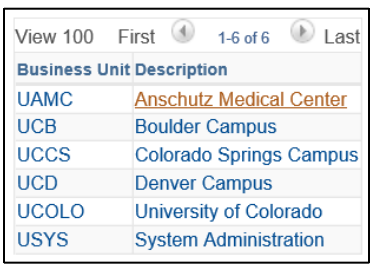
- **Position Number 00000000:** The system displays 00000000 as the Position Number until you save the transaction. It also displays a Position Status of Approved, which will change to Proposed after you enter a Department later in the procedure.
- **Initializing a Position:** If you are using the Initialize button to copy Description tab information from a denied position, continue to step 10 in the *Updating a Denied Position* procedure below.

5. In the **Effective Date** box (located in the Position Information section), type or select an effective date.

6. From the **Reason** box, keep the default of **NEW**.
7. Locate the **Job Information** section on the page. In this section, the Business Unit will default based on your security, which determines the workflow routing for your campus.



8. If you need to change the Business Unit, click the **Business Unit** look up, and select your campus.



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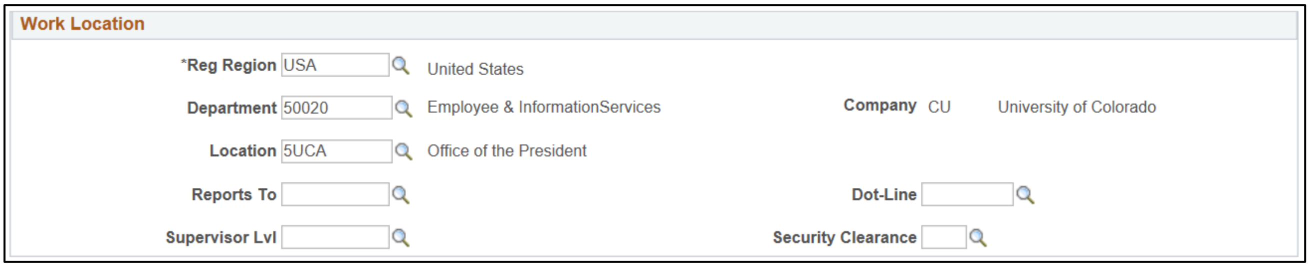
Business Unit	Description
UAMC	Anschutz Medical Center
UCB	Boulder Campus
UCCS	Colorado Springs Campus
UCD	Denver Campus
UCOLO	University of Colorado
USYS	System Administration

9. Type or select the **Job Code** and press **Tab**. The system populates the remaining fields.
10. From the **Reg/Temp** list box, select either **Regular** or **Temporary**.
11. Press **Tab** to move to the **Full/Part Time** list box and select either **Full-Time** or **Part-Time**.
12. Allow the **Regular Shift** field to default to the value of **Not Applicable**.
13. Leave the **Union Code** field blank. This field is used by HR only to update Classified positions that are exempt from the Partnership Act.
14. The Title field displays the default title associated with the Job Code. If you want a different title, delete the default title and type the new working title.

    Note: Do not use special characters (apostrophes, dashes, bullets, asterisks, etc.) when entering a new working title. Special characters conflict with other systems and processes that use the Title field from position data.

15. Locate the **Work Location** section on the page.



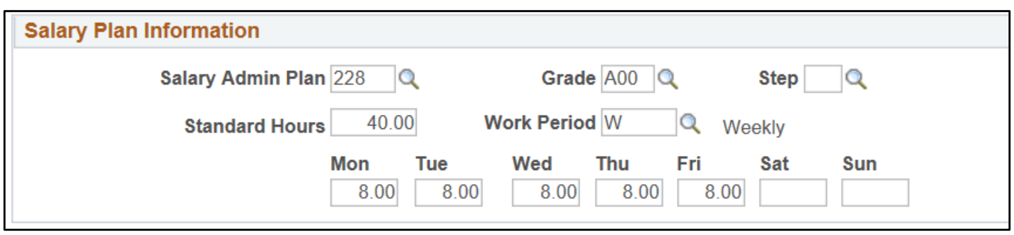
16. In the **Reg Region** field, leave the default of **USA**.
17. Either type or click the **Department** look up and select the correct department code. After you enter Department, the Position Status updates to Proposed.

    To display a list of departments for a campus:

    a. Type the first number associated with that campus. For example, type 1 to display Boulder department codes. The following numerals are associated with each campus: 1 (CU Boulder), 2 (Anschutz Medical Campus, or AMC), 3 (CU Denver), 4 (UCCS) and 5 (System Office).

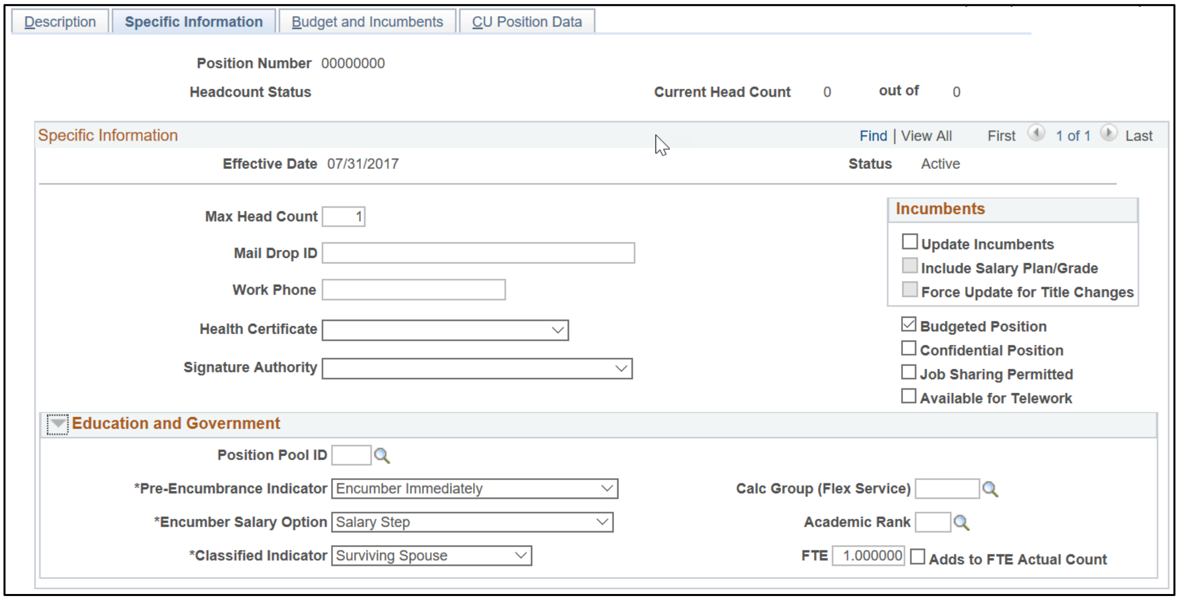
    b. Click the look up to select a value.
18. Press **Tab** to move to the **Location** field, which will display a default location according to the selected Department code. Use the look up if you want to select a different value.
19. In the **Reports To** field, type a value, or select a value from the look up. The Reports To value is the position number of the supervisor to whom the position you are creating reports to. The Reports To position must also be encumbered (funded position).

    Note: If you are planning to recruit for this position using CU Careers, the Reports To field must have a value, and the select Reports To position must have an incumbent; that is, the Reports To position cannot be vacant.
20. Locate the **Salary Plan** information section on the page.



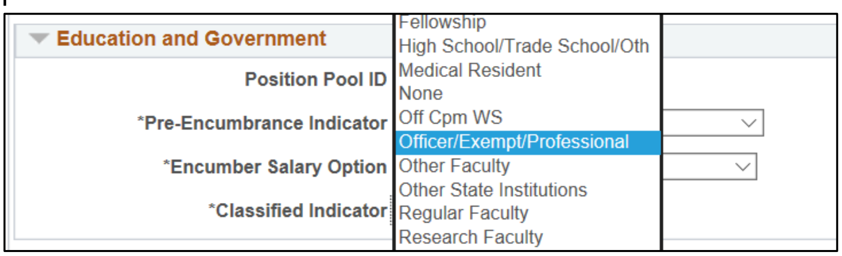
21. Allow **Salary Admin Plan**, **Grade**, and **Work Period** to default according to the Job Code. Do not edit these fields.
22. Edit **Standard Hours**. The Standard Hours field will default according to the Job Code, but you can update it, if necessary. What you enter as the Standard Hours value will determine the Full-Time Equivalency (FTE) value. Standard hours determine eligibility for benefits. Employee who work 20 or more standard hours in a weekly work period are eligible for benefits. Contact HR for assistance if you are unsure what the standard hours should be.
23. If needed, click the USA flag USA to update **FLSA Status**. (Exempt or Non-Exempt)

24. Click the **Specific Information** tab.



25. Do not select the **Update Incumbents** box when creating a position. If this box is selected for a new position, the system will display an error when you save (new positions don't have incumbents).

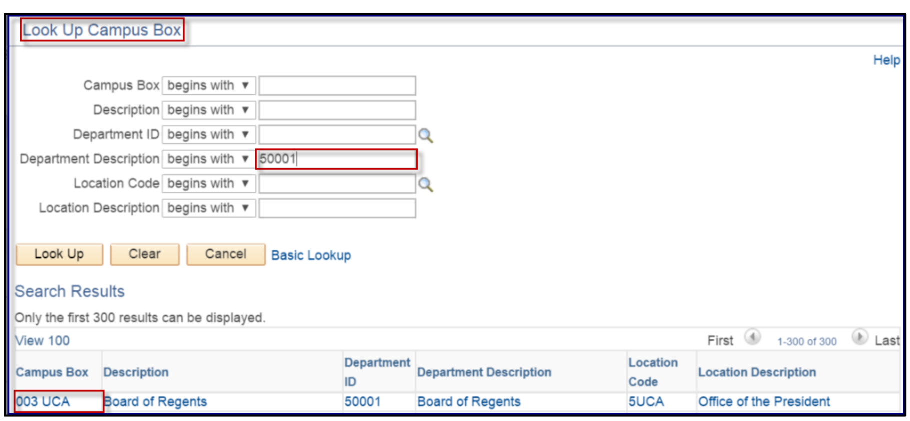
26. Under the Education and Government section, select the **Classified Indicator** appropriate for the position.



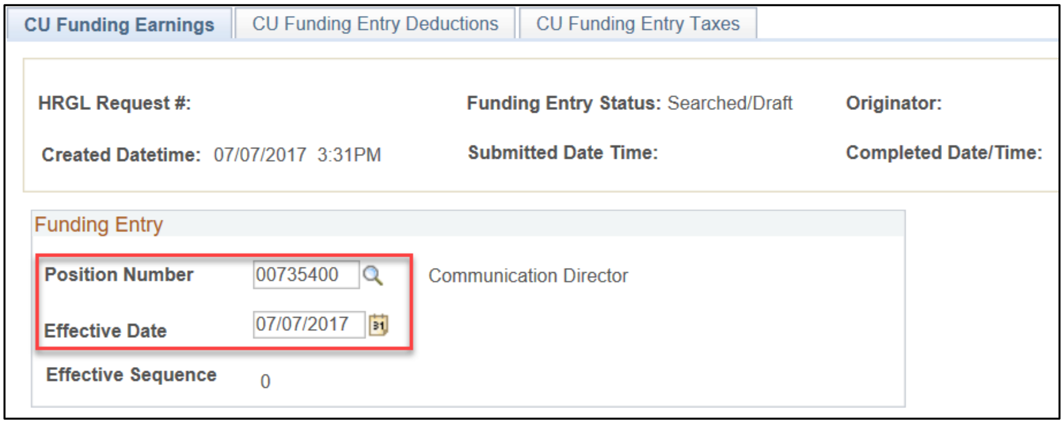
27. Ensure that the **FTE** value is correct. This number is a calculated field that will correspond proportionally to the indicated Standard Hours.

28. Click the **CU Position Data** tab.

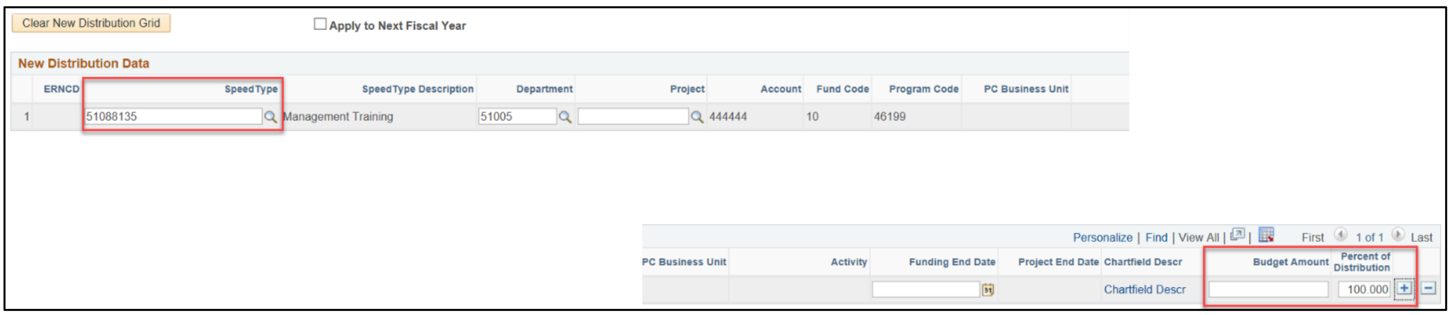
29. Enter the **Campus Box** that is appropriate for the selected Department. Click the look up to search for the Department ID by entering the number into the Department ID field.



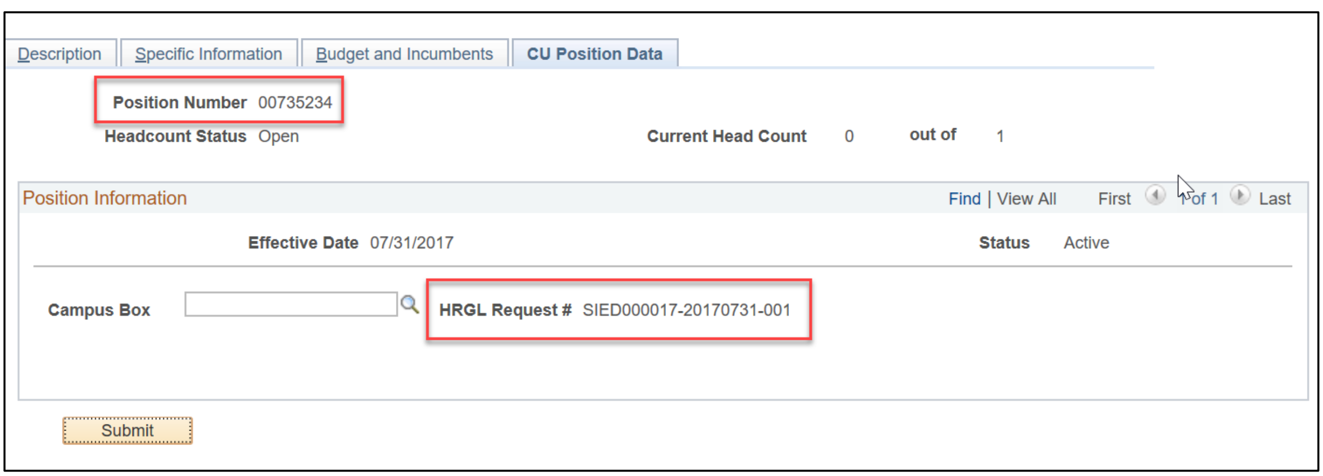
30. Click **Save** from the bottom of the page. This system displays *Saving* in the top right corner of the page and then displays the CU Funding Entry page with the position number and effective date populated from your saved position.



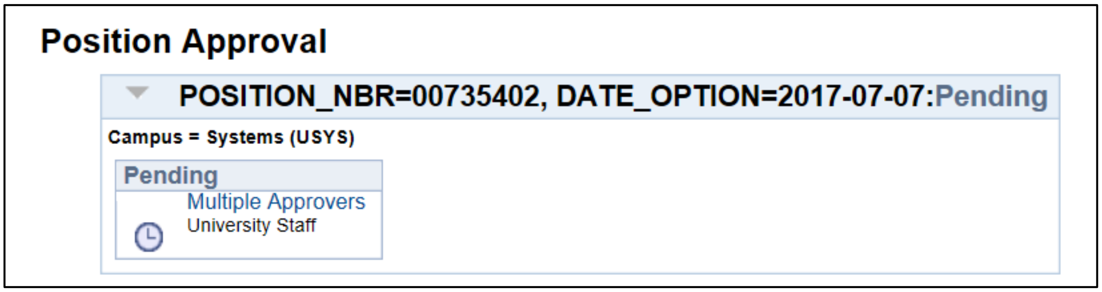
31. In the **New Distribution Data** section, enter the **SpeedType** and **Percent of Distribution**. Refer to *Creating a Funding Entry Step-by-Step Guide* for more information about funding.



32. Click **Save/Submit** from the CU Funding Earnings tab. HCM saves the funding entry and returns you to the Position Information page. Note the new position number and the HRGL Request number on this page. Use this HRGL Request number to confirm that the funding entry status has changed to Completed once the position has been approved. Also, confirm the funding posted in Position Funding History.



33. Click **Submit**. The workflow associated with the Business Unit and job code will appear.



The position now has the status of Submitted and will go through the approval process. Once the position is approved:

- Data changes are written to the HCM tables.
- The status of the request is updated from Pending to Approved. The HRGL Request will update to Completed and the funding will post to the department budget table with the indicated funding.

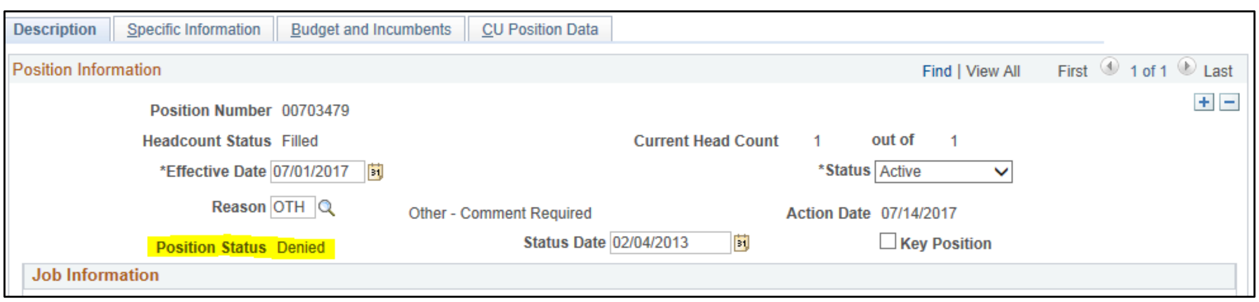
After the position is approved, you can create the Non-Person Profile (NPP) and recruit for it through the applicant tracking system. Refer to *Creating or Updating a Non-Person Profile (NPP) Step-by-Step Guide* for more information.

Updating a Denied Position

If your position is denied, you will receive an email notification as to why it was denied. The funding in the HRGL Request created with the original position NEW row will not post.

1. From the HCM Community Users dashboard, click the **Non-Pay Actions** tile.
2. From the menu on the left, select **Position Management**> **Add/Update Position Info**.
3. From the **Find an Existing Value** tab, enter search criteria for the position.
4. Click **Search**.

   The Position page appears at the Description tab showing the Position Status as Denied.



5. Click the plus button to add a row.

6. In the **Effective Date** box (located in the Position Information section), type or select a date that is one day greater than the existing effective date. The Position Status changes to Proposed.

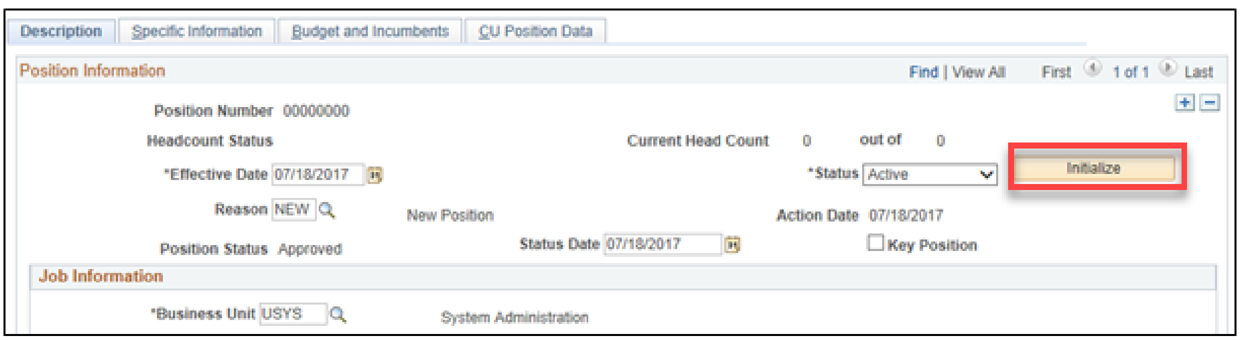
> **When the Position Must Have the Same Effective Date**
> If you must use the same effective date as the denied position row, then you must create a new position. When creating the new position, you can use the Initialize button to copy the Description information from your denied position. Follow steps 1 through 3 of *Creating a Position* to create a new position, and then continue to Step 10 (Initialize) below to continue.

7. From the **Reason** box, select the reason for the update. This field is required.
8. If needed, make any corrections to the information on the Description tab.
9. Complete the corrections specified in the denial notification, click **Save** and resubmit for approval.

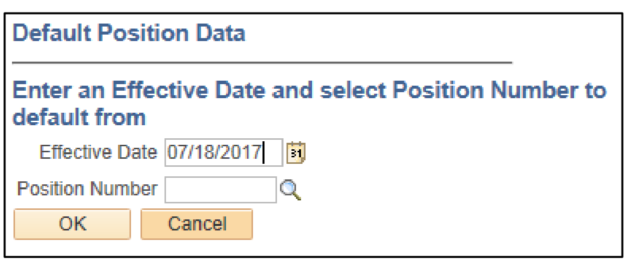
   You can refer back to the steps in creating a new position procedure for more information about the steps (step 24 through 33, which includes Specific Information, CU Position Data, all the way through submitting the position for approval).

   When the NEW position row is denied, funding from the original HRGL Request will not post. When adding the post denial row, a new CU Funding Entry page will not launch unless the department is changed. In order to create funding for this position, a separate CU Funding Entry must be completed with the same effective date as the revised row. Refer to *Making a Funding Entry Step-by-Step Guide* for more information about funding.

10. If you are cloning information from your denied position, click the **Initialize** button. This creates a position with a new position number but with all the same Description information. The Initialize button only appears on new positions.

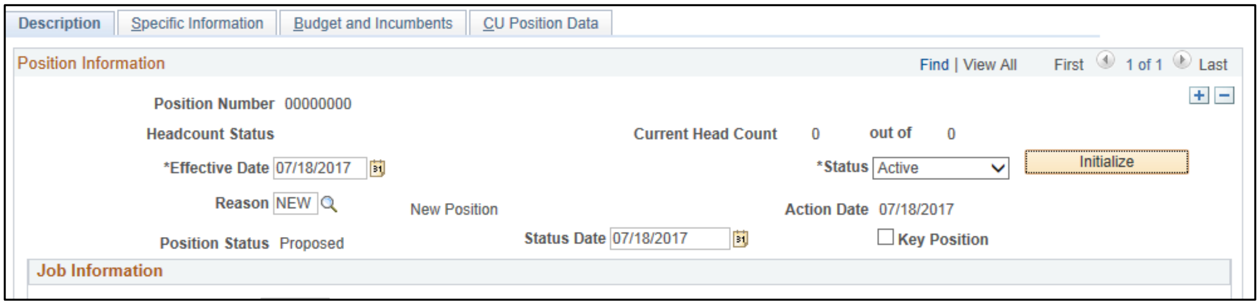


The following message appears:



a. Enter the effective date and the position number of your denied position.

b. Click **OK**. HCM populates the denied position's data into a new position with a Position Status of Proposed.



11. If needed, make any corrections to the cloned information on the Description tab.

12. Select the **Specific Information** tab and continue as you would when creating a new position in order to complete the corrections that were specified in the denial notification. This is step 24 in *Creating a Position* procedure.

Results of Approval

After the request has a status of Submitted, it will go through the approval process. Once the updates are approved:

- Data changes are written to the HCM tables.
- The status of the request is updated to Approved. A position **must** be in Approved status in order to complete a template-based transaction (TBT).
- The funding entered in the HRGL Request with the same effective date as the approved position row (for a NEW or Department Change row) will post to create new funding.

If necessary, you can edit the Non-Person Profile (NPP). Refer to *Creating or Updating a Non-Person Profile (NPP) Step-by-Step Guide* for more information.