

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 <u>Hiring an Employee Step-by-Step Guide</u> and <u>Transferring an Employee Step-by-Step Guide</u>.
- About updating a specific position, refer to <u>Updating a Position Step-by-Step Guide</u>.

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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:

	New Window Help
Add/Update Position Info	
Find an Existing Value	Add a New 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	▶ 1
Position Number begins with Description begins with Position Status Position S	

- 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.

Description Specific Information Budget and Incumbents CU	Position Data
Position Information	Find View All First 🕚 1 of 1 🕑 Last
Position Number 0000000	+ -
Headcount Status	Current Head Count 0 out of 0
*Effective Date 07/07/2017	*Status Active V Initialize
Reason NEW Q New Position	Action Date 07/07/2017
Position Status Proposed	Status Date 07/07/2017 3 Key Position

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 <u>step 10</u> 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.

Position Information				Find View All	First 🕚 1 of 1 🕑 Last
Position Number 00000000					+ -
Headcount Status		Current Head Count	0 ot	ut of 0	
*Effective Date 05/30/2017			*Status	Active 🔻	Initialize
Reason NEW Q	New Position		Action Date (05/31/2017	
*Position Status Approved	▼	Status Date 05/31/2017		Key Position	

- 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.

Job Information		
*Business Unit USYS	System Administration	
Job Code 2280 🔍	Communication Director	
* Reg/Temp Regular	\sim	*Full/Part Time Full-Time
*Regular Shift Not Applicable	\checkmark	Union Code
Title Communication Di	rector	Short Title Comm Dir Detailed Position Description

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

View 100 F	irst 🕚 1-6 of 6 🕑 Last
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.

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

Work Location				
*Reg Region USA	Q	United States		
Department 50020	Q	Employee & InformationServices	Company CU	University of Colorado
Location 5UCA	Q	Office of the President		
Reports To	Q		Dot-Line	Q
Supervisor LvI	Q		Security Clearance	L

- 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.

Salary Plan Information							
Salary Admin Plar	228	2	Grade	e A00	2	Step	Q
Standard Hours	40.0	0 W	ork Period	W b	Q We	ekly	
	Mon 8.00	Tue 8.00	Wed 8.00	Thu 8.00	Fri 8.00	Sat	Sun

- 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 ^{IIII} USA to update **FLSA Status**. (Exempt or Non-Exempt)

24. Click the Specific Information tab.

Description	Specific Information	Budget and Incumbents	CU Position Data			
	Position Nu	mber 00000000				
	Headcount S	itatus		Curren	t Head Count 0	out of 0
Specific In	formation			AF.	Fin	d View All First 🕚 1 of 1 🕑 Last
	Effectiv	e Date 07/31/2017		45	Statu	us Active
	Max Head	Count 1				Incumbents
	Mail D	rop ID				Update Incumbents
	Work	Phone				Include Salary Plan/Grade Force Update for Title Changes
	Health Cert	ificate	\sim			Budgeted Position
	Signature Au	thority		\sim		☐ Confidential Position ☐ Job Sharing Permitted
						Available for Telework
Educ	ation and Governmen	t				
	Position	Pool ID				
	*Pre-Encumbrance In	ndicator Encumber Immedia	ately	\checkmark	Calc Group (Flex Ser	vice)
	*Encumber Salary	Option Salary Step		\checkmark	Academic F	Rank
	*Classified Ir	ndicator Surviving Spouse	\sim		FTE 1.000	000 Adds to FTE Actual Count

- 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.

	Education and Government	Fellowship High School/Trade School/Oth	
	Position Pool ID	Medical Resident None	
		Off Cpm WS	\sim
		Officer/Exempt/Professional	
	*Encumber Salary Option		\sim
		Other State Institutions	
	*Classified Indicator	Regular Faculty	
ŀ		Research Faculty	

- 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.

Look Up C	ampus Box					
						Help
Ca	ampus Box begins with 🔻					
0	Description begins with 🔻]			
Dep	artment ID begins with 🔻		Q			
Department [Description begins with 🔻 50001		3			
Loc	ation Code begins with 🔻		Q			
Location [Description begins with 🔻]			
Look Up Search Res	Clear Cancel Basic Looku	qı				
View 100					First ④ 1-300 of 300	🕑 Last
Campus Box	Description	Department ID	Department Description	Location Code	Location Description	
003 UCA	Board of Regents	50001	Board of Regents	5UCA	Office of the President	

6 HCM Step-by-Step Guide | hcm_sbs-Creating-Position-Funding.docx Revised: November 12, 2023 | Prepared by: Employee Services 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.

U Funding Earnings CU Funding Entry D	Deductions CU Funding Entry Taxes	
HRGL Request #:	Funding Entry Status: Searched/Draft	Originator:
Created Datetime: 07/07/2017 3:31PM	Submitted Date Time:	Completed Date/Time
Funding Entry		
	Occurrent and the Director	
Position Number 00735400	Communication Director	
	Communication Director	

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

Cle	ar New D	istribution Grid		Apply to Next Fiscal Year									
Ne	v Distrib	ution Data											
	ERNCD	\$	SpeedType	SpeedType Description	De	epartment	Project	Accourt	t Fund Code	e Program Code	PC Business Unit		
1		51088135	Q 1	Management Training	51005	Q	٩	44444	10	46199			
												Personalize Find View	All 🗷 🖪 🛛 First 🚯 1 of 1 🕑 Last
							PC Business	Unit	Activity	Funding En	d Date Project End	d Date Chartfield Descr	Budget Amount Distribution
											Ħ	Chartfield Descr	100.000

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.

Description Specific Information Budget and	d Incumbents CU Position Data	
Position Number 00735234 Headcount Status Open	Current Head Count 0	out of 1
Position Information		Find View All First 🕢 🖓 of 1 🕑 Last
Effective Date 07	/31/2017	Status Active
Campus Box	HRGL Request # SIED000017-20170731-001	
Submit		

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

Pos	sition Approval	
	POSITION_NBR=00735402	, DATE_OPTION=2017-07-07:Pending
	Campus = Systems (USYS)	
	Pending	
	Multiple Approvers University Staff	

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.

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

Description Specific Information Budget and Incur	mbents <u>C</u> U Position Data				
Position Information			Find View All	First 🕙 1 of 1 🖉	Last
Position Number 00703479					+ -
Headcount Status Filled		Current Head Count	1 out of 1		
*Effective Date 07/01/2017			*Status Active		
Reason OTH Q	Other - Comment Required		Action Date 07/14/2017		
Position Status Denied	Status Date	02/04/2013	Key Position		
Job Information					

5. Click the plus button $\stackrel{\textcircled{}}{\textcircled{}}$ 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 <u>1 through 3</u> of *Creating a Position* to create a new position, and then continue to <u>Step 10</u> (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 <u>creating a new position procedure</u> for more information about the steps (step <u>24</u> through <u>33</u>, 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.

Description Specific Information Budget and Incumbents CU Position Data	
Position Information Find View	v All 🛛 First 🛞 1 of 1 🛞 Last
Position Number 00000000	+ -
Headcount Status Current Head Count 0 out of 0	
*Effective Date 07/18/2017	✓ Initialize
Reason NEW Q New Position Action Date 07/18/2017	
Position Status Approved Status Date 07/18/2017 🕞 Key Position	
Job Information	
*Business Unit USYS Q System Administration	

The following message appears:

Default Position Data						
Enter an Effective Date and select Position Number to default from						
Effective Date 07/18/2017						
Position Number Q OK Cancel						

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- 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.

Description Specific Information Budget and Incumbents CU	Position Data
Position Information	Find View All First 🕚 1 of 1 🕑 Last
Position Number 00000000	* -
Headcount Status	Current Head Count 0 out of 0
*Effective Date 07/18/2017	*Status Active V Initialize
Reason NEW Q New Position	Action Date 07/18/2017
Position Status Proposed	Status Date 07/18/2017
Job Information	

- 11. If needed, make any corrections to the cloned information on the Description tab.
- 12. Select the **Specific Information** tab and <u>continue as you would when creating a new position</u> in order to complete the corrections that were specified in the denial notification. This is step <u>24</u> 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.