

8.9 HRMS Step by Step Guide

Initialize (Copy) New Position w/ Funding - Organizational Development Module

Overview: This guide provides instruction on creating a new position with funding by copying an existing position

Note: The screen shots used in this guide may not be representative of your access.

1. Navigate to Add a New Value

- Organizational Development
- Position Management
- Maintain Positions/Budgets
- Add/Update Position Info

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Main Menu > Organizational Development >

Position Management

Maintain positions and budgets; create organizational reports; Print position and budget information.

- Maintain Positions/Budgets**
Identifies positions within organization, budgets for positions, and allows for creation of job requisitions
 - Add/Update Position Info
 - Funding Distribution
 - Position Transfer only
 - PET/Retroactive Funding Change
 - Correction PET
 - PET Cancellation
- Review Position Budget Info**
Displays summary, historical, and vacated budgeted position information
 - Position Summary
 - Position History
 - Budget Status
 - Payroll Expense Transfers
 - PET Jobcode Sweep History
 - Position Funding History
 - Paycheck Distribution
- Position Reports**
Initiates creation of reports showing the status and history of positions in the organization
 - Active/Inactive Positions
 - Active Position History
 - Incumbent History
 - Position Status
 - Benefits with No Earnings
 - Vacant Position
 - PET Reports
 - PET Status
 - Funding Distribution - DeptID
 - Funding Distribution - PosNo
 - Positions by SpeedType
 - Position Commitment
 - Vacant Position Report
 - Funding Distribution Status
 - Suspense Reports

2. Add/Update Position Info page displays

- Click [Add a New Value](#)

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[New Window](#) |

Add/Update Position Info

Enter any information you have and click Search. Leave fields blank for a list of all values.

Position Number: begins with

Description: begins with

Position Status: =

Business Unit: begins with

Department: begins with

Job Code: begins with

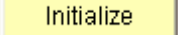
Reports To Position Number: begins with

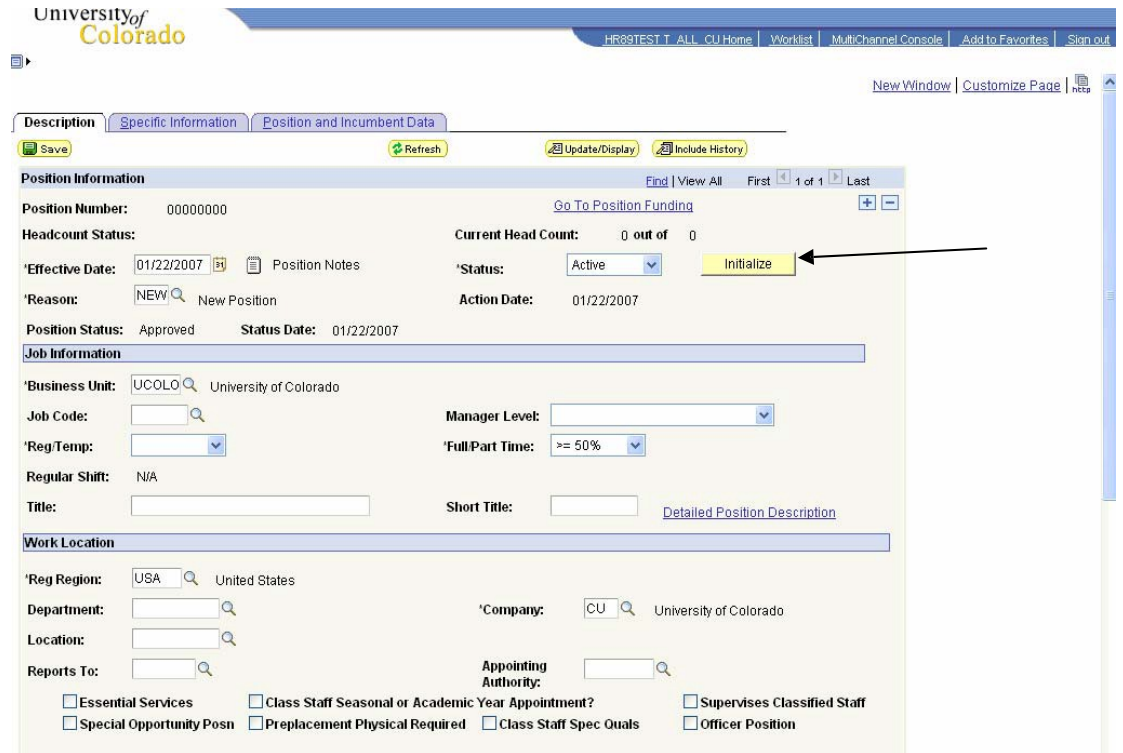
Include History

[Basic Search](#)

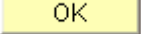
[Find an Existing Value](#) | [Add a New Value](#)

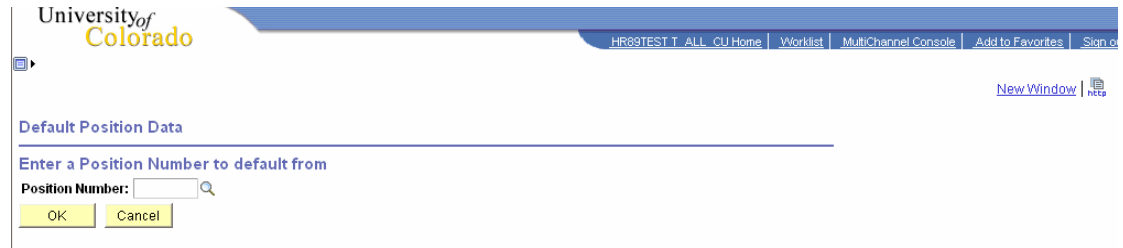
3. Description page displays

- Position Information section:
 - a) Effective date defaults to current date. Change if necessary
 - b) Status defaults to Active
 - c) Reason defaults to New
 - d) **Initialize** button provides opportunity to copy data from an existing position
 - e) Click 



4. Default Position Data page displays

- Enter Position Number to be copied
- Click 




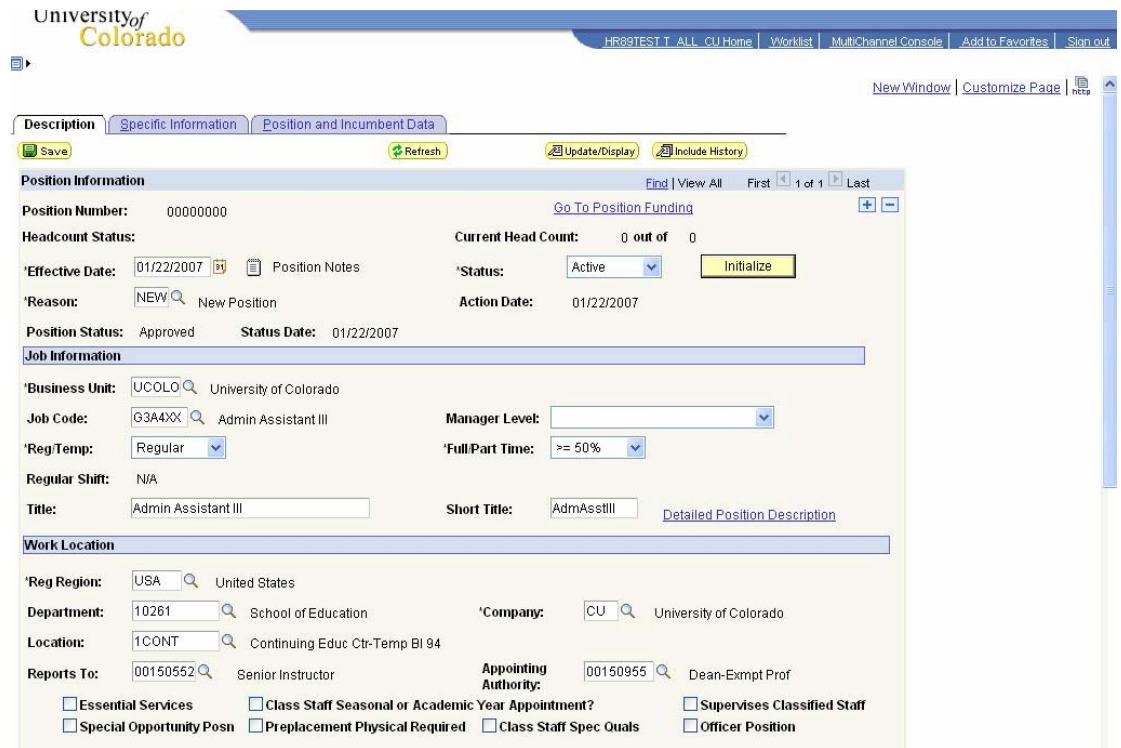
5. Description page displays

Data has been copied from existing position

- a) Not all fields, however, will be copied
- b) Note that Position Number has not been assigned
- c) Effective Date is current date; change if necessary
- d) Retain or change position data as needed on all pages
- e) Enter Reports To: position number (required for all HRMS positions, with the exception of student hourly, student faculty or retirees)
- f) Review and **Save**
- g) After New Position has been saved, Position Notes may be added on either Description or Specific Information pages


Click

 Position Notes to enter comments (optional)







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HR89TEST.T ALL CU Home Worklist MultiChannel Console Add to Favorites Sign out

New Window | Customize Page | 



Description | **Specific Information** | Position and Incumbent Data


 Save  Refresh  Update/Display  Include History

Position Information Find | View All First 1 of 1 Last

Position Number: 00000000 [Go To Position Funding](#)  


Headcount Status: Current Head Count: 0 out of 0



'Effective Date: 01/22/2007  Position Notes 'Status: Active 



'Reason: NEW  New Position 'Action Date: 01/22/2007

Position Status: Approved Status Date: 01/22/2007

Job Information

'Business Unit: UCULO  University of Colorado


Job Code: G3A4XX  Admin Assistant III 'Manager Level: 



'Reg/Temp: Regular  'Full Part Time: >= 50% 


Regular Shift: N/A



Title: Admin Assistant III 'Short Title: AdmAsstIII [Detailed Position Description](#)

Work Location

'Reg Region: USA  United States

Department: 10261  School of Education 'Company: CU  University of Colorado

Location: 1CONT  Continuing Educ Ctr-Temp BI 94

Reports To: 00150552  Senior Instructor 'Appointing Authority: 00150955  Dean-Exmpt Prof

Essential Services Class Staff Seasonal or Academic Year Appointment? Supervises Classified Staff

Special Opportunity Posn Preplacement Physical Required Class Staff Spec Quats Officer Position

6. To Enter Funding Distribution Data for the New Position:

- Click [Go To Position Funding](#) link

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New Window | Customize Page | Help

Description | **Specific Information** | Position and Incumbent Data

Save Refresh Update/Display Include History

Position Information

Position Number: 00000000 [Go To Position Funding](#)

Headcount Status: Current Head Count: 0 out of 0

Effective Date: 01/22/2007 Position Notes Status: Active Initialize

Reason: NEW New Position Action Date: 01/22/2007

Position Status: Approved Status Date: 01/22/2007

Job Information

Business Unit: UCULO University of Colorado

Job Code: G3A4XX Admin Assistant III Manager Level: [v]

Reg/Temp: Regular Full Part Time: >= 50%

Regular Shift: N/A

Title: Admin Assistant III Short Title: AdmAsstIII [Detailed Position Description](#)

Work Location

Reg Region: USA United States

Department: 10261 School of Education Company: CU University of Colorado

Location: 1CONT Continuing Educ Ctr-Temp BI 94

Reports To: 00150552 Senior Instructor Appointing Authority: 00150955 Dean-Exmpt Prof

Essential Services Class Staff Seasonal or Academic Year Appointment? Supervises Classified Staff

Special Opportunity Posn Preplacement Physical Required Class Staff Spec Quals Officer Position

7. Funding Distribution page displays

- Choose either AMT or PCT for method of distributing funding
- Enter estimated salary or percent of salary to be paid from SpeedType/FOPPS
- Enter SpeedType. FOPPS attributes will display after tabbing
- Enter Funding End Date if applicable. Each row in Distribution may have a different funding end date
- Click to insert additional rows as needed (one row for each ST)
- If using PCT distribution, row/rows must = 100%
- Funding Notes may be added

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New Window | Customize Page | Help

Funding Distribution | Position and Incumbent Data

Save Return to Search Next in List Previous in List Refresh

EmpID: [Go To Position Data](#)

[Go To Funding History](#)

Funding

Position Number: 00678830 Sequence: 0 Entered Date: 12/14/2006

Funding Status: Proposed Funding Notes Status Date: 12/14/2006

Funding Begin Date: 12/01/2006 Amt Pct Appr Reject:

Distribution

	Percent	Speed Type	Funding End Date	Speed Type Description	Fund	Org	Program	Project	Sub Class	Proj Bdg End Date	Exp Transfer ID	Transfer Status
1												

8. Save Funding Distribution

- **REMEMBER:**
FUNDING MUST EXIST BEFORE POSITION CAN BE APPROVED BOTH FUNDING & POSITION MUST BE APPROVED

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[New Window](#) | [Customize Page](#) | [Print](#)

Funding Distribution | [Position and Incumbent Data](#)

[Save](#) | [Return to Search](#) | [Next in List](#) | [Previous in List](#) | [Refresh](#)

[Go To Position Data](#)
[Go To Funding History](#)

Funding | [Find](#) | [View All](#) | First | 1 of 1 | Last

Position Number: 00678830 Sequence: 0 Entered Date: 08/13/2006

[Funding Notes](#) Funding Status: Approved Status Date: 11/20/2006

Funding Begin Date: 11/05/2006 Amt Pct Appr Reject: Vedral, James Leno

Distribution | [Customize](#) | [Find](#) | [Print](#) | First | 1 of 1 | Last

	*Percent	*Speed Type	Funding End Date	Speed Type Description	Fund	Org	Program	Project	Sub Class	Proj Bdg End Date	Exp Transfer ID	Transfer Status	
1	100.000	41021398		College of Engineering	10	40042	23552						+ -

9. For Further Information:

- See Create New Position w/ Funding step-by-step guide

Initialize (Copy) New Position w/Funding complete