

Human Capital Management: Step-by-Step Guide

Maintaining a POI Relationship

This guide contains procedures for maintaining a Person of Interest (POI). Maintaining a POI includes updating the sponsor, department or business unit, extending the planned exit date, as well as activating or inactivating a POI. If you want to add additional POI types (security access) to a POI, refer to *Adding an Additional POI Type Step-by-Step Guide*.

Contents

Maintaining a POI Relationship.....	1
Before You Begin.....	1
Navigating to the Maintain POI Relationship Page.....	2
Updating the POI’s Department or Business Unit	4
Updating the Planned Exit Date.....	5
Updating the POI’s Sponsor	9
Activating or Inactivating a POI Record	10

Before You Begin

Before updating a POI record, you should have the following information available, depending on what information you are updating:

- The Person ID (same as Empl ID) assigned to the POI whose record you are updating.
- The Department and Campus Business Unit associated with the POI and POI Type you are updating. These values are required.
- The position number of the sponsor for this POI relationship. The sponsor is a university employee responsible for the POI.

Note: HCM requires an active sponsor for every POI. If there is no sponsor currently defined, the system will require you to add one when making any changes to a POI.

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 systems. Through the NavBar, you can select CU Resources to access systems on the portal.




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



The book and checkmark lets you spell check text boxes.



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

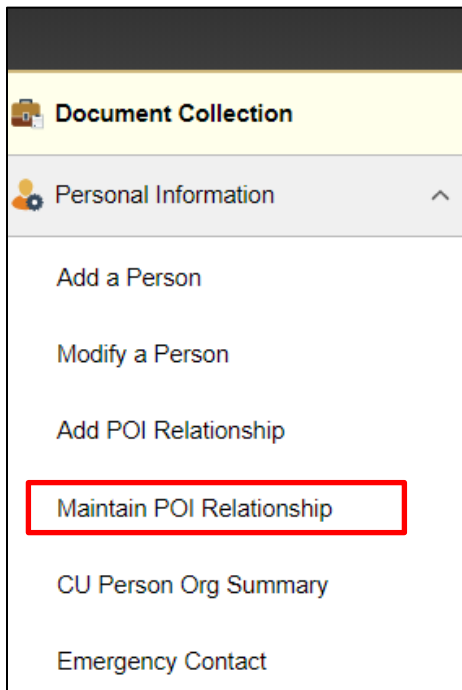
Click the  arrow to expand the section.

Navigating to the Maintain POI Relationship Page

The procedures in this guide are performed from the Maintain POI Relationship page.

To access the Maintain POI Relationship page:

1. From the HCM Community Users dashboard, click the **Non-Pay Actions** tile.
2. Under **Personal Information**, select **Maintain POI Relationship**.



- In the **Empl ID** field, enter the Person ID of the POI.

Maintain POI Types

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

[Find an Existing Value](#)

▼ **Search Criteria**

Empl ID

Person of Interest Type

Name

Last Name

Second Last Name

Alternate Character Name

Include History Correct History Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

- Click **Search**. The Maintain POI Relationship page appears.

[Maintain POI Relationship](#) [CU POI Sponsor](#)

Maintain POI Relationship

Person ID

Person of Interest Type **Electronic Research Admin** Last Updated By **NELS001657** Last Update **02/14/18 9:05:36AM**

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

Effective Date **09/15/2016** [+](#) [-](#)

Security Access Type	Enabled	Value 1	Value 2
BUSINESS UNIT	<input checked="" type="checkbox"/>	Business Unit UAMC	
DEPARTMENT	<input checked="" type="checkbox"/>	Set ID UCOLO Department 60068	


Person of Interest History [Personalize](#) | [Find](#) | [Print](#) First 1-2 of 2 Last

*Effective Date	*Status	*Planned Exit	Comments
1 02/14/2018	A	09/15/2019	
2 09/15/2016	A	09/15/2019	

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#) [Refresh](#) [Update/Display](#) [Include History](#)

Updating the POI's Department or Business Unit

The Department and Business Unit are required. To change the Department or Business Unit for a POI:

1. From the Maintain POI Relationship page, click the plus  button in the Security Data section. The system adds a row for modifying the **Effective Date**, **Department** and **Business Unit**.
2. Select or type the **Business Unit** and **Department**.

Warning: Do not use UCOLO for your business unit. This field should be populated with the appropriate business unit for your campus.

3. Allow the **Set ID** to default to **UCOLO**.
4. Click **Save**.

Maintain POI Relationship

Person ID [REDACTED]

Person of Interest Type: Electronic Research Admin | Last Updated By: NELS001657 | Last Update: 02/14/18 9:05:36AM

Security Data Find | View All First 1 of 2 Last

*Effective Date: 02/14/2018

*Security Access Type	Enabled	Value 1	Value 2
BUSINESS UNIT	<input checked="" type="checkbox"/>	Business Unit: UAMC	
DEPARTMENT	<input checked="" type="checkbox"/>	Set ID: UCOLO Department: 60068	

Person of Interest History Personalize | Find First 1 of 1 Last

*Effective Date	*Status	*Planned Exit	Comments
1 09/15/2016	A	09/15/2019	

Save | Return to Search | Previous in List | Next in List | Notify | Refresh | Update/Display | Include History

Updating the Planned Exit Date

Employee Services runs a POI mass termination process each month to inactivate POIs with expired planned exit dates. To keep your POIs active, you should regularly review planned exit dates and update them when necessary.

This section describes how to:

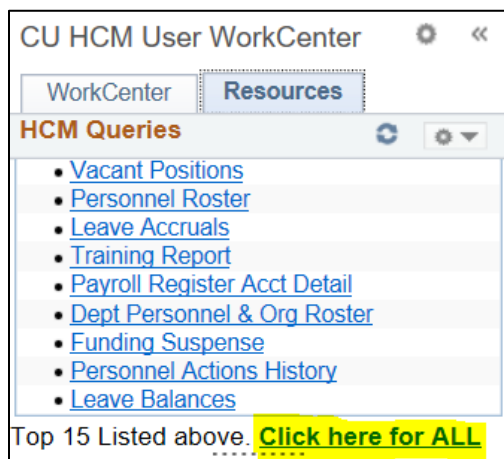
- Run a query to identify active POI records and their planned exit dates.
- Review the results of the query.
- [Extending the planned exit date](#) for those POI records you do not want terminated.

Running the POI Query

To find a list of your POIs and their planned exit dates, run the CUES_HCM_POI_REPORT.

To run the POI query:

1. From the HCM Community Users dashboard, click the **HCM WorkCenter** tile.
2. From the **CU HCM User WorkCenter**, click the **Resources** tab. Query Manager lists the 15 most frequently used queries.
3. Scroll down to display a list of queries available to all HCM users and select **Click here for ALL**.



A list of all HCM user queries appears to the right of the WorkCenter.

4. Click **POI Report** (CUES_HCM_POI_REPORT).

- Type the **Department** number and **A** (for Active) in the fields highlighted below.

- Click **View Results** to run the query.

HCM displays all active POIs for the department, similar to the image below:

POI Empl ID	POI Last Name	POI First Name	POI Middle Name	POI Type	POI Type Descr	Eff Date	Planned Exit	Default Flag	POI Status	Dept ID	Dept Name	Updated By	Sponsor Name	Sponsor Email
00013				Pre-Employment		05/05/2011	05/05/2012		Active	10018	AthBusAff	B00301		
00013				Pre-Employment		08/26/2013	08/26/2014		Active	10018	AthBusAff	PATZ000016		
00013				Pre-Employment		12/21/2013	12/21/2013		Active	10018	AthBusAff	TRIP000072		
00013				Pre-Employment		04/29/2013	04/29/2014		Active	10018	AthBusAff	PATZ000016		
00013				Pre-Employment		05/05/2011	05/05/2012		Active	10018	AthBusAff	B00301		
00020				Volunteer		07/06/2015	07/06/2016		Active	10018	AthBusAff	TRIP000072		
00020				Volunteer		01/26/2016	01/26/2017		Active	10018	AthBusAff	TRIP000072		
00013				Pre-Employment		06/15/2011	06/15/2012		Active	10018	AthBusAff	B00301		
00020				Volunteer		09/17/2014	09/17/2015		Active	10018	AthBusAff	TRIP000072		
00013				Pre-Employment		04/15/2011	04/15/2012		Active	10018	AthBusAff	B00301		
00013				Pre-Employment		05/12/2011	05/12/2012		Active	10018	AthBusAff	B00301		

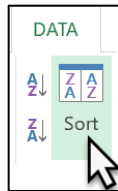
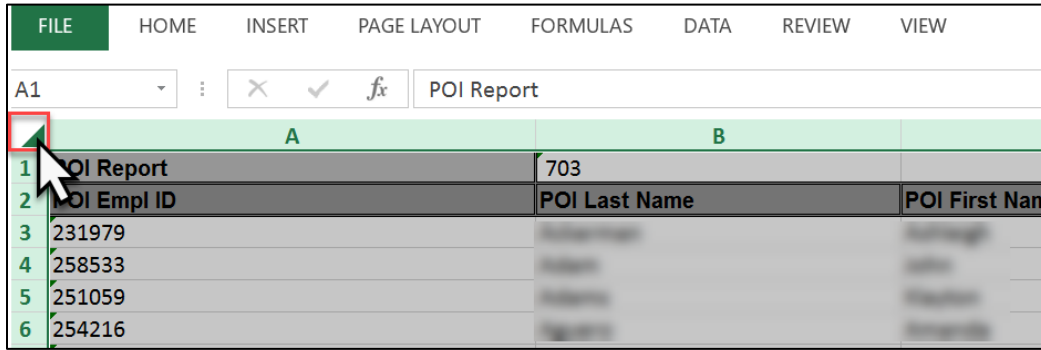
Downloading Query Results

To download the results to an Excel spreadsheet:

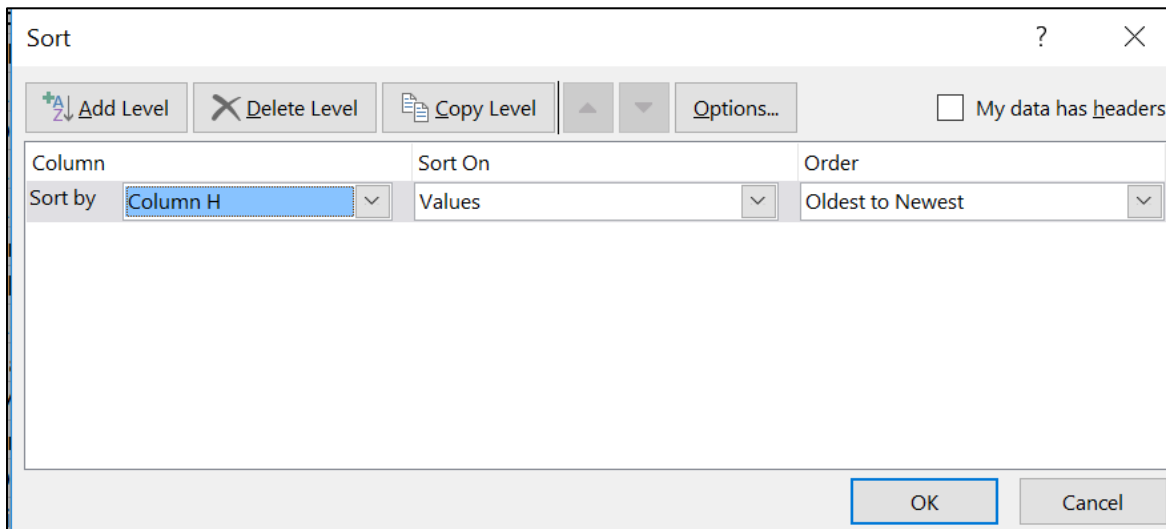
- Click **Excel SpreadSheet**. Microsoft Excel opens a spreadsheet with your results displayed in Protected View.

- Click **Enable Editing** at the top of the page.

3. Select the contents of the spreadsheet.




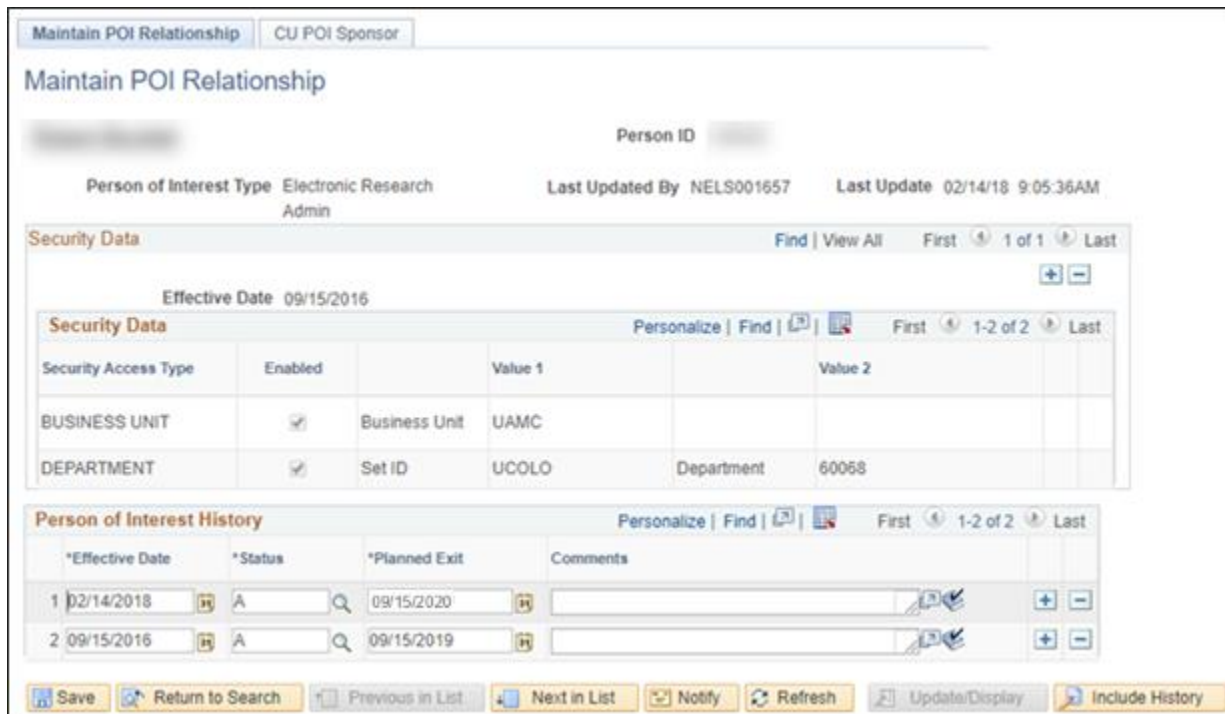
- From the **Data** menu, select **Sort**. The Sort dialog box appears.
- From the **Sort by** list, select **Column H**, which contains the planned exit date. Oldest to Newest should appear selected under the Order; leave this value so that expired planned exit dates will be listed first.
- Click **OK**.



Review the spreadsheet for any POI records with planned exit dates that need to be extended. POIs with expired planned exit dates will be inactivated the next time Employee Services runs the POI Mass Termination monthly process.

Extending the Planned Exit Date

1. From the Maintain POI Relationship page, click the plus  button in Person of Interest History section. The system displays a new row with an Effective Date of today.
2. Edit the **Effective Date**, if necessary.
3. From the **Status** list, select **A** (Active).
4. Enter a **Planned Exit Date**. You can enter a date of up to five years from today's date.
5. Click **Save**.



Maintain POI Relationship

Person ID

Person of Interest Type: Electronic Research Admin
Last Updated By: NELS001657
Last Update: 02/14/18 9:05:36AM

Security Data

Effective Date: 09/15/2016

Security Access Type	Enabled	Value 1	Value 2
BUSINESS UNIT	<input checked="" type="checkbox"/>	Business Unit UAMC	
DEPARTMENT	<input checked="" type="checkbox"/>	Set ID UCOLO	Department 60068


Person of Interest History

*Effective Date	*Status	*Planned Exit	Comments
1 02/14/2018	A	09/15/2020	
2 09/15/2016	A	09/15/2019	

Save Return to Search Previous in List Next in List Notify Refresh Update/Display Include History

Updating the POI's Sponsor

HCM requires an active sponsor for every POI. If there is no sponsor currently defined, the system will require you to add one when making any changes to a POI.

1. From the Maintain POI Relationship page, click the **CU POI Sponsor** tab.
2. Click the plus  button in the **POI Sponsors** section. The system adds a row for updating the sponsor.
3. In the **Position Number** field, type the position number of the POI's sponsor. You can use the look up to search for and select the position number. After you select the position number, the system displays the position's title.
4. Enter the **Effective Date**.
5. From the **Status** list, select **Active**. A POI must have an active sponsor at all times.
6. Click **Save**. The **Last Updated By** time and date stamp will display after saving.

Maintain POI Relationship | CU POI Sponsor

Person ID

Person of Interest Type Electronic Research Admin


POI Sponsors				Personalize	Find	First	1 of 1	Last
	Position Number	Description	Effective Date					
1	00001000	Business Services Manager	01/01/2018					Active

Last Updated By NELS001657 | Last Update 02/14/18 9:05:36AM

Save | Return to Search | Previous in List | Next in List | Notify | Refresh | Update/Display | Include History

Activating or Inactivating a POI Record

Occasionally, you may need to activate or inactive a POI record.

1. From the Maintain POI Relationship page, click the plus  button in the Person of Interest History section. The system displays a new row with an Effective Date of today.
2. Update the **Effective Date**, if necessary.
3. From the **Status** list, select either **A** (for Active) or **I** (Inactive).
4. Update the **Planned Exit Date**. You can enter a date of up to five years from today's date.
5. Click **Save**.

Maintain POI Relationship

Person ID

Person of Interest Type: Electronic Research Admin

Last Updated By: NELS001657

Last Update: 02/14/18 9:05:36AM

Security Data

Effective Date: 09/15/2016

Security Access Type	Enabled	Value 1	Value 2
BUSINESS UNIT	<input checked="" type="checkbox"/>	Business Unit UAMC	
DEPARTMENT	<input checked="" type="checkbox"/>	Set ID UCOLO	Department 60068

Person of Interest History

*Effective Date	*Status	*Planned Exit	Comments
02/14/2018	A	09/15/2019	
09/15/2016	A	09/15/2019	

Save | Return to Search | Previous in List | Next in List | Notify | Refresh | Update/Display | Include History