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:

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

4. Click **Search**. The Maintain POI Relationship page appears.
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.
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.
4. Click POI Report (CUES_HCM_POI_REPORT).
5. Type the **Department** number and **A** (for Active) in the fields highlighted below.

![POI Report](image.png)

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

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

![POI Report](image.png)

**Downloading Query Results**

To download the results to an Excel spreadsheet:

1. Click **Excel Spreadsheet**. Microsoft Excel opens a spreadsheet with your results displayed in Protected View.

![Download Excel](image.png)

2. Click **Enable Editing** at the top of the page.
3. Select the contents of the spreadsheet.

4. From the **Data** menu, select **Sort**. The Sort dialog box appears.

5. 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.

6. 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**.
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.
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**.