

Human Capital Management: Step-by-Step Guide

Updating a Position

This guide describes how to update a position in HCM. If you want to update funding, make any position updates first and then you will need to make a funding entry as a separate process. For information about updating funding for a position, refer to *Making a Funding Entry Step-by-Step Guide*.

After a position is updated, 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 update is approved, the data for the position is written to HCM.

While non-person profiles (NPPs) are associated with a position, they are managed separately. For more information about updating NPPs, refer to *Creating or Updating an NPP Step-by-Step Guide*.

Caution: Any updates that affect position must be made through the position page, not through an ePAR transaction. Position changes include job code, business unit, title, standard hours/FTE, full/part-time indicator, classified indicator, location, department and reports to. If you want to update a position, refer to *Updating a Position Step-by-Step Guide*, which describes the process through Non Pay Actions> Position Management.

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Before You Begin

Before you begin, you should have the following information:

- Position number.
- The effective date of your change. The effective date can be current, future or past as long as it does not have a date prior to the incumbent's current row in Job Data. If the effective date used coincides with a previous pay period, determine whether any payroll adjustments must be made. Those adjustments must be made as a separate process.
- Information specific to the position you are updating: Business Unit, Job Code, Regular or Temporary, Full-Time or Part-Time, and Department. If you are updating the Department code, the system will display the CU Funding Entry page from which you can update the SpeedType and Percent of Distribution.
- Positions have a default Title associated with the Job Code. If you are updating the Title to a different working title, you should know what it will be.

Additional tips:



The NavBar displays options for accessing other 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 lets you spell check text boxes.



The trashcan lets you remove an item.



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

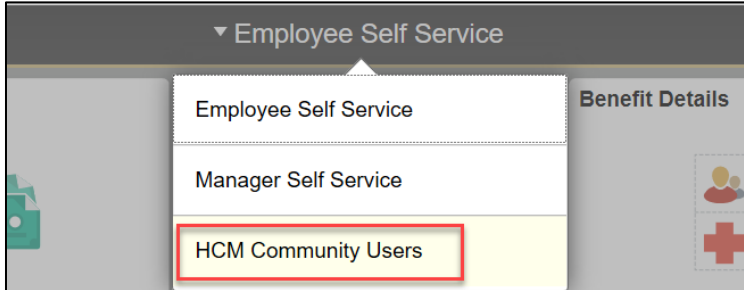
Click the  arrow to expand the section.

Updating a Position

To update a position:

1. Navigate to **Add/Update Position Info**.

- a) Go to HCM Community Users dashboard: **NavBar> CU Resources> Business Tools> HCM> Employee Self Service> HCM Community Users**



The HCM Community Users dashboard appears.

- b) Click the **Non-Pay Actions** tile.
- c) From the menu on the left, select **Position Management> Add/Update Position Info**.

The Add/Update Position Info page appears:

 A screenshot of the 'Add/Update Position Info' page. The page has a blue header with the University of Colorado logo and the text 'User: ABEY000135 on Database: HCMTST'. Below the header, there is a breadcrumb trail: 'Favorites > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info'. The main content area is titled 'Add/Update Position Info' and contains the instruction 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this, there are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. Under the 'Find an Existing Value' tab, there is a 'Search Criteria' section with several search fields: 'Position Number' (with a 'begins with' dropdown), 'Description' (with a 'begins with' dropdown), 'Position Status' (with an '=' dropdown), 'Business Unit' (with a 'begins with' dropdown and a magnifying glass icon), 'Department' (with a 'begins with' dropdown and a magnifying glass icon), 'Job Code' (with a 'begins with' dropdown and a magnifying glass icon), and 'Reports To Position Number' (with a 'begins with' dropdown). At the bottom of the search criteria section, there are three checkboxes: 'Include History', 'Correct History', and 'Case Sensitive'. At the very bottom, there are four buttons: 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

2. From the **Find an Existing Value** tab, enter search criteria for the position. Department and Job Code are most helpful.
3. Click **Search**.

The Position page appears at the Description tab.

4. Click the plus button  to add a row.
5. In the **Effective Date** box (located in the Position Information section), type or select an effective date.

6. From the **Reason** box, select the correct reason for the update.
7. Update the fields necessary.

Note: The following actions may occur when you save or submit your update:

- If you change the Department, the CU Funding Entry page will appear for you to update funding related to this position. The related approval workflow will also be applied.
- If you change Business Unit or Job Code, an approval workflow will be applied.

8. Click the **Specific Information** tab.

9. Pass changes through to an incumbent. The Incumbents box lets you choose options for updating job data associated with the employee currently in the position.
 - a. If you don't want your updates to apply to the person currently holding the position, deselect, or clear, the **Update Incumbents** box. However, if you want to update the position and the incumbent in this position, make sure the Update Incumbents box is selected so the system will update both the Position and Job Data with this information.
 - b. Select **Include Salary Plan/Grade** to include your Salary Plan changes on the incumbent's Job Data. This option is only available when Update Incumbents is also selected.
 - c. If you are updating the working title, which otherwise defaults from the job code, you can select **Force Update for Title Changes**, to update the title for the incumbent in Job Data.
10. Under Education and Government, select the appropriate **Classified Indicator**.
11. Click the **CU Position Data** tab.
12. If changing the Campus Box, 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 Campus Box

Campus Box begins with

Description begins with

Department ID begins with

Department Description begins with

Location Code begins with

Location Description begins with

[Basic Lookup](#) [Help](#)

Search Results

Only the first 300 results can be displayed.

View 100 First 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

13. Click **Save**. If you changed the Department, the CU Funding Entry page will appear as well as approval workflow. Refer to *Making a Funding Entry Step-by-Step Guide* for more information about funding.
14. From the **CU Position Data** tab, click **Submit**. If you changed the Business Unit or Job Code, the appropriate approval workflow will appear after clicking Submit.

Updating Denied Position Changes

If your updates are denied, you will receive an email notification indicating why they were denied.


1. Navigate to **Add/Update Position Info**.
 - a. Go to HCM Community Users dashboard: **NavBar> CU Resources> Business Tools> HCM> Employee Self Service> HCM Community Users**
 - b. Click the **Non-Pay Actions** tile.
 - c. From the menu on the left, select **Position Management> Add/Update Position Info**.
2. From the **Find an Existing Value** tab, enter search criteria for the position.
3. Click **Search**.

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

The screenshot shows the 'Position Information' tab selected. The page displays the following details:

- Position Number:** 00703479
- Headcount Status:** Filled
- Current Head Count:** 1 out of 1
- *Effective Date:** 07/01/2017
- *Status:** Active (dropdown menu)
- Reason:** OTH
- Action Date:** 07/14/2017
- Position Status:** Denied (highlighted in yellow)
- Status Date:** 02/04/2013
- Key Position:** (checkbox, unchecked)

At the bottom, there is a 'Job Information' section.

4. Click the plus button  to add a row.
5. 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.
6. From the **Reason** box, select the reason for the update.
7. Make the necessary corrections and click **Save**.
8. From the CU Position Data tab, click **Submit**. The position now has a status of Submitted and will go through the approval process again.

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.

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