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.



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 Initialize

4. Default Position Data page displays

Enter Position Number to be copied Click OK

	New Window Customize Page
Description Specific Information Position and Inc	umbent Data
Save	Prefresh Image: Comparison of the start of
Position Information	Find View All First 🗹 1 of 1 🕑 Last
Position Number: 00000000	Go To Position Funding
leadcount Status:	Current Head Count: 0 out of 0
Effective Date: 01/22/2007 🛐 🗐 Position Notes	'Status: Active 💌 Initialize
Reason: NEW Q New Position	Action Date: 01/22/2007
Position Status: Approved Status Date: 01/2.	2/2007
Job Information	
Business Unit: UCOLO 🔍 University of Colorado	
Job Code:	Manager Level:
Reg/Temp:	'FulliPart Time: ≥= 50% ∨
Regular Shift: N/A	
Title:	Short Title: Detailed Position Description
Nork Location	
Reg Region: USA Q United States	
Department:	Company: CU C University of Colorado
Location:	
Reports To:	Appointing Q Authority:
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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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Location: 1CONT Continuing Educ Ctr-Temp BI 94	
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Additions.	ent? Supervises Classified Staff
Special Opportunity Posn Preplacement Physical Required Class Staff	Spec Quals Officer Position

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

Click
Go To Position Funding
link

- 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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- 8. Save Funding Distribution
 - **REMEMBER:** FUNDING MUST EXIST BEFORE POSITION CAN **BE APPROVED BOTH FUNDING** & POSITION MUST BE **APPROVED**

9. For Further Information:

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

Initialize (Copy) New^{Position} w/Funding complete

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