Human Capital Management: Step-by-Step Guide

Adding an Additional POI Type to a Person of Interest (POI)

This guide describes the process for adding an additional POI type to a Person of Interest (POI) using an ePAR Non-Pay Action. POI types are used to define security roles that determine what systems a POI may access.

Warning: You can assign additional POI types the same day that the transaction for creating the POI was approved but you must use different effective dates; otherwise you will receive a data conflict error.

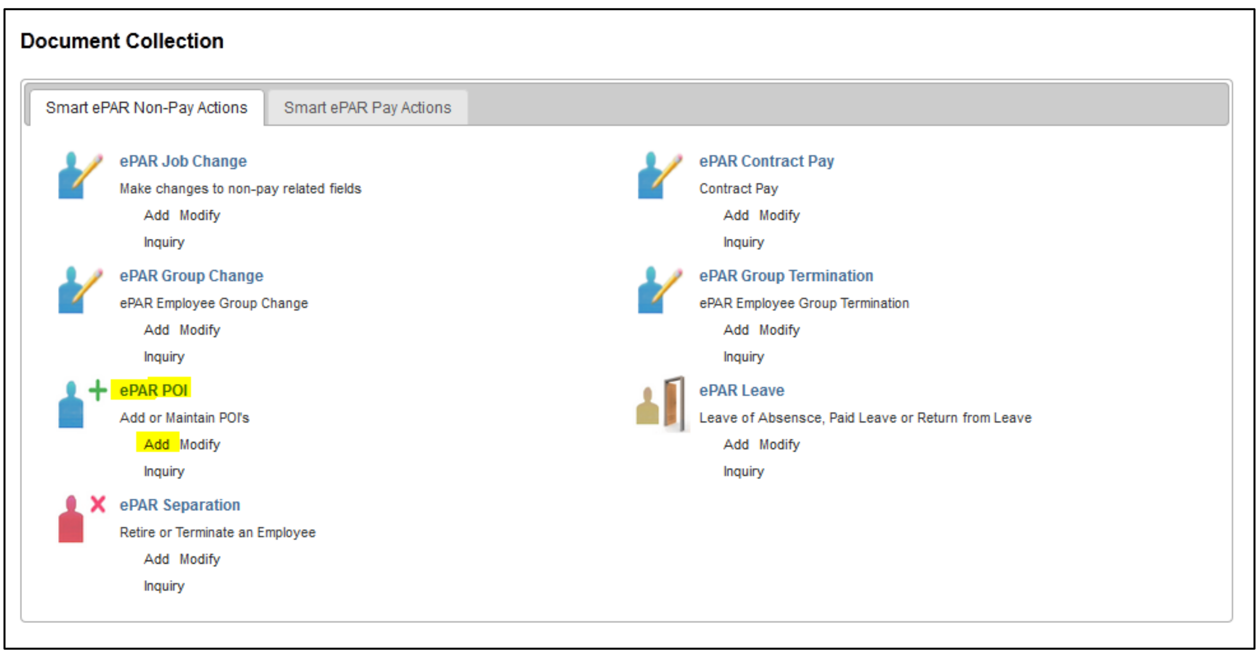
Before you begin, here are a few tips:

- 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.

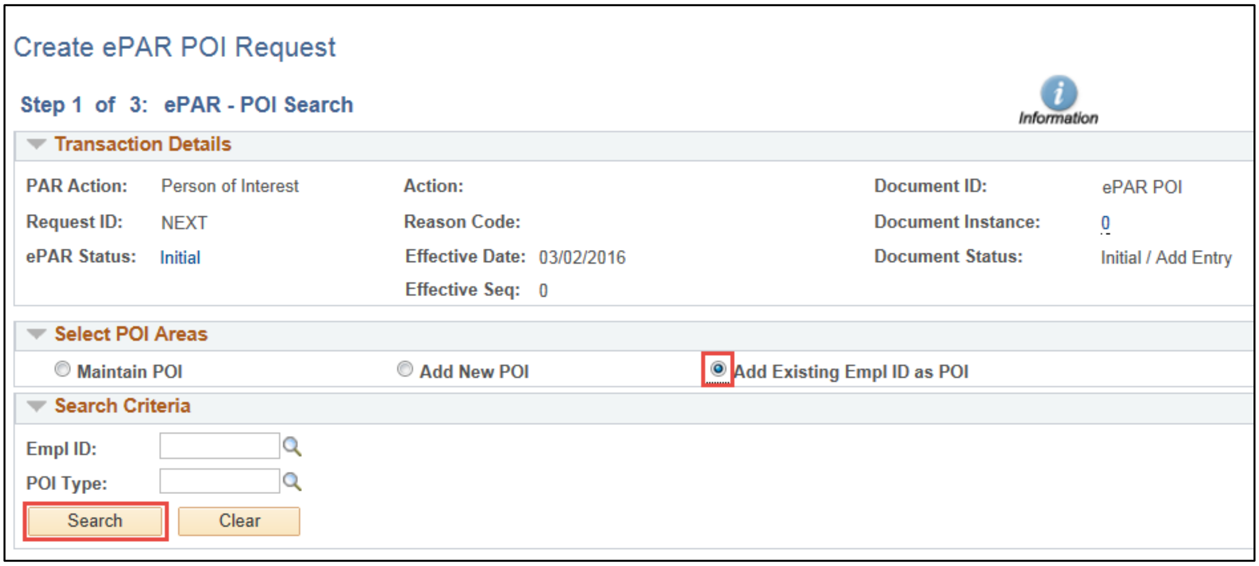
Beginning the Transaction

1. Navigation: **Main Menu**> **Smart Solutions**> **Document Framework**> **Document Collection**.
2. Select the **Smart ePAR Non-Pay Actions** tab.
3. Under ePAR POI, click **Add**.



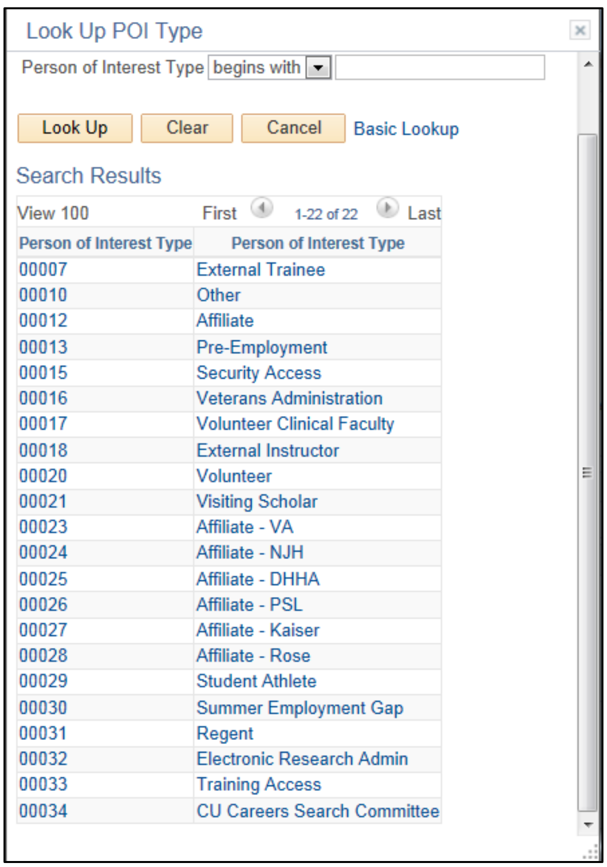
Step 1: Select POI Area

1. Click **Add Existing Empl ID as POI**.



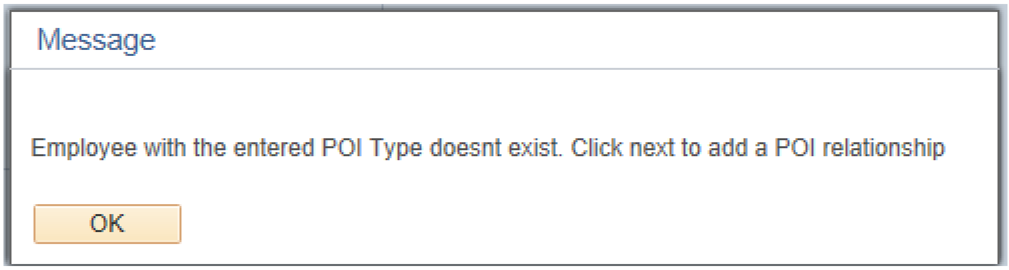
2. In the **Empl ID** field type the ID of the POI, and press **Tab**.

3. Next to **POI Type**, click the look up and select the new POI Type that you want to add:



Refer to your campus HR for more information about which POI type you should select.

4. Click **Search**. The system displays the following message, indicating that you have selected a relationship that does not currently exist on this POI's record.

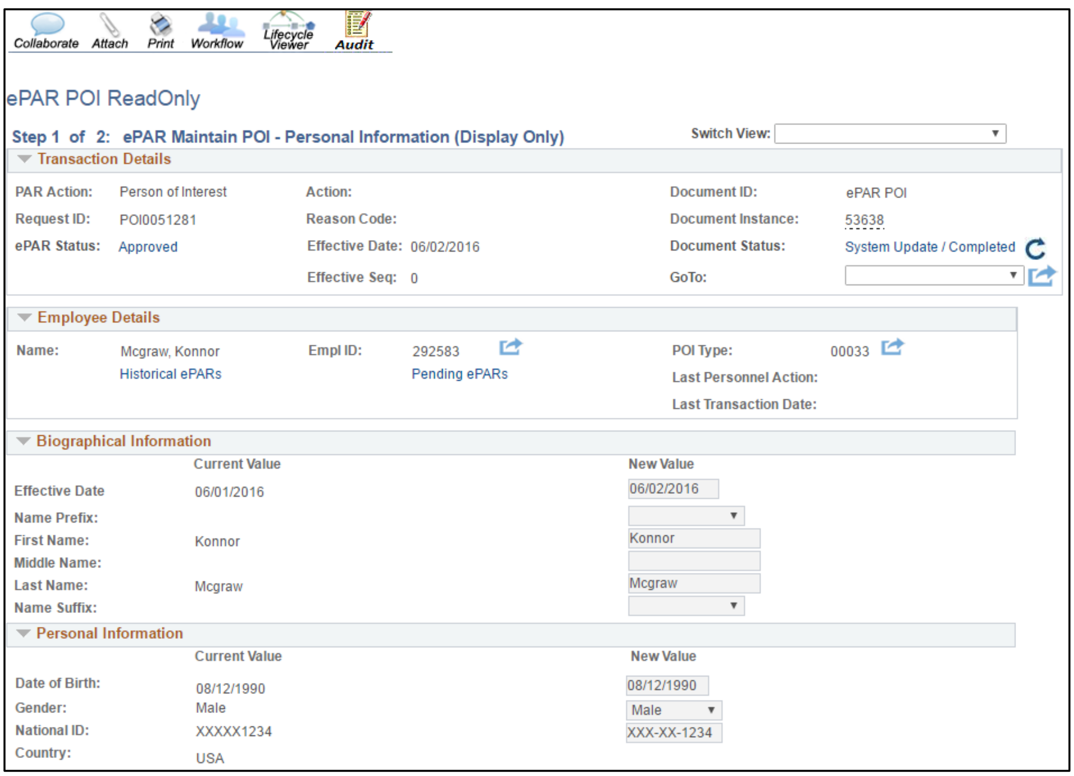


5. Click **OK**.
6. Click **Next**.

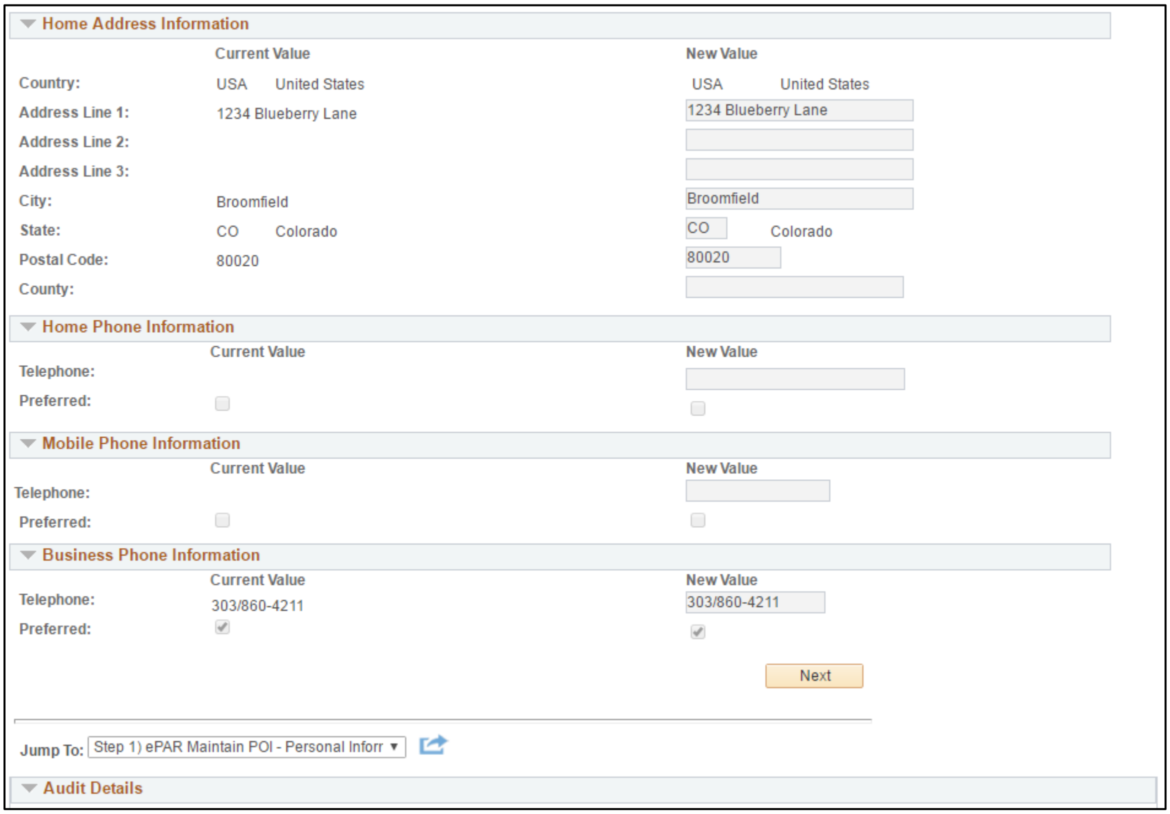
Step 2: Personal Information

The system displays the POI's current information.

1. Make any changes in the fields under the **New Value** column.
2. Change the Effective Date to a day later than the default date if you are adding an additional POI type the same day the transaction for creating the POI was approved.

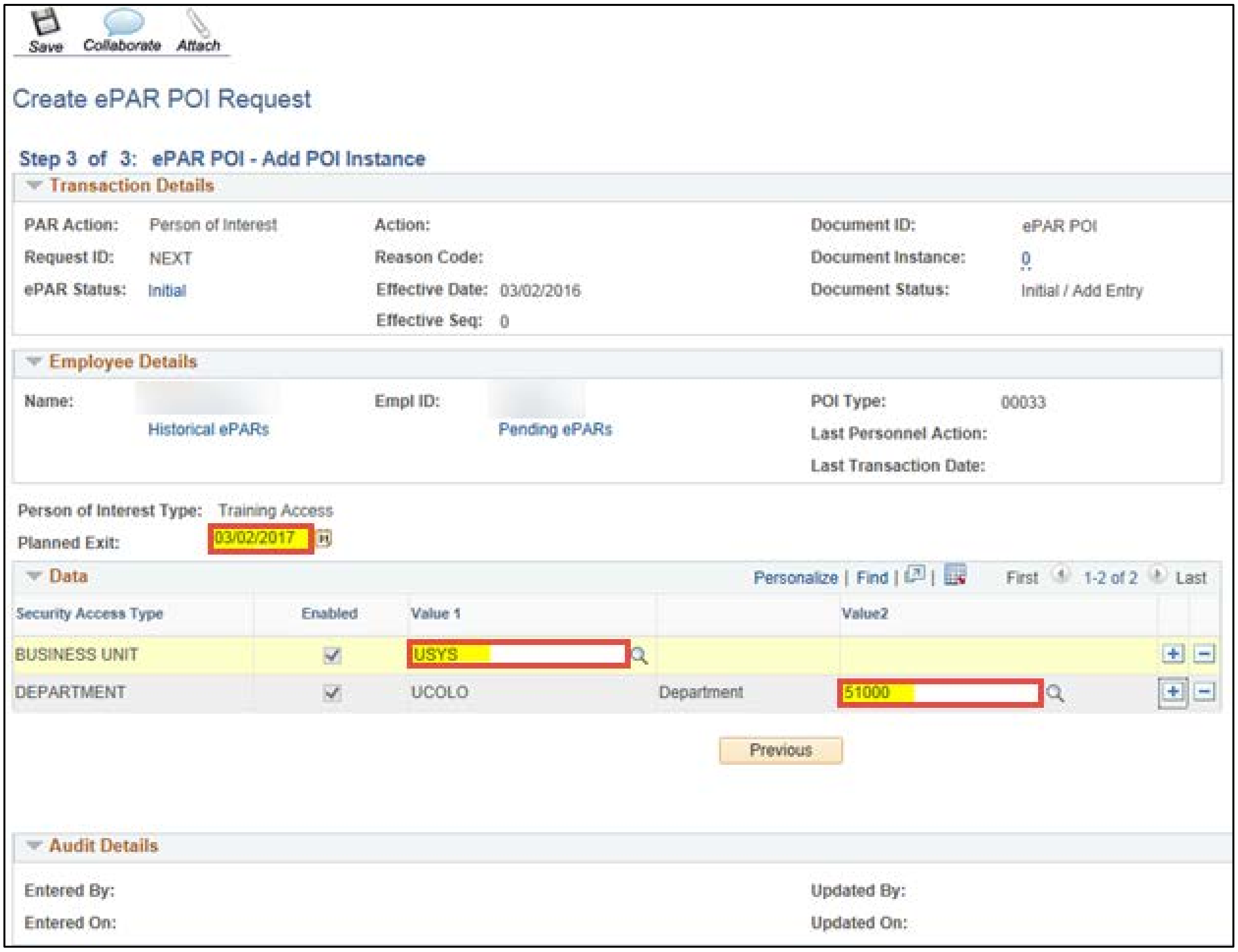


3. Click **Next**.


Home Address Information
Current Value
New Value
Country:
USA United States
USA United States
Address Line 1:
1234 Blueberry Lane
1234 Blueberry Lane
Address Line 2:
Address Line 3:
City:
Broomfield
Broomfield
State:
CO Colorado
CO Colorado
Postal Code:
80020
80020
County:
Home Phone Information
Current Value
New Value
Telephone:
Preferred:
Mobile Phone Information
Current Value
New Value
Telephone:
Preferred:
Business Phone Information
Current Value
New Value
Telephone:
303/860-4211
303/860-4211
Preferred:
Next
Jump To:
Step 1) ePAR Maintain POI - Personal Inforr
Audit Details

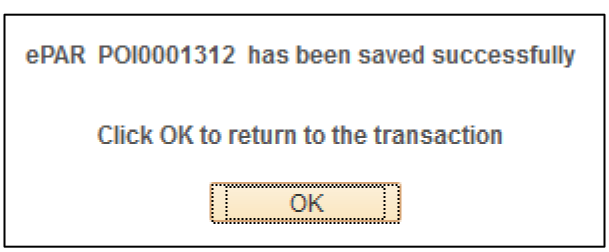
Step 3: Add POI Instance

1. Edit the **Planned Exit** date if it is something other than the default date displayed.
2. Select or type the **Business Unit** and **Department**.



Step 4: Saving and Submitting the Transaction

1. Click **Save** from the top left corner. 

2. Click **OK**. 

3. Click **Submit**.