

Human Capital Management: Step-by-Step Guide

Creating a Position with Funding

This guide describes how to create a position in HCM. Creating a position involves defining position information, salary plan information, percentage of time, and other specific details. Also, when creating a position, HCM will display the CU Funding Entry page for you to enter funding information. While the position is connected to a non-person profile (NPP), which acts as the job description, creating or updating an NPP is a separate process.

After a new position is created, 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 is approved, the data for the position is written to HCM tables and an employee (existing, former, or a new hire) can be assigned to it.

For more information about NPPs, refer to Creating or Updating an NPP Step-by-Step Guide.

For information about assigning an employee to a position, refer to *Hiring an Employee Step-by-Step Guide* and *Transferring an Employee Step-by-Step Guide*.

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Before You Begin

Before you begin, you should have the following information:

• Position number of the Reports To supervisor associated with the new position.

The Reports To field is the position number of the supervisor to which the position you are creating reports to. If you are planning to recruit for this position in CU Careers, then the Reports To field must have a value and an incumbent in that position. If you are not using CU Careers, there only needs to be a Reports To position and an incumbent is not required.

- The effective date of your position, which can be the default of today's date, or a past date, or a future date. If you are planning to have HCM feed the position to CU Careers for posting a requisition, the Effective Date must equal today's date or earlier (it cannot be future dated).
- Keep in mind the hire date for the employee you will eventually hire should be a date **later** than the effective date of the position.
- Information specific to the position you are creating: Business Unit, Job Code, Regular or Temporary, Full-Time or Part-Time, and Department code.
- Positions have a default Title associated with the Job Code. If you are updating the Title to a working title, you should know what it will be.
- Department Budget Table (DBT) information for funding:
 - The active SpeedType of the fund (or funds) being used for this position.
 - Distribution of the funding (amount or percentage). For example, your department may want to allocate a fixed amount to a SpeedType, and the remaining amount to another SpeedType. You can specify a fixed amount and then the percentage will calculate accordingly. The total allocation across SpeedTypes must always equal 100%.

Additional tips:

- The non-person profile is referred to as NPP throughout this document.
- W The NavBar displays options for accessing other systems. Through the NavBar, you can select CU Resources to access systems on the portal.
- C 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 rrow to expand the section.

Creating a Position

To create 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

	▼ Employee Self Service	
	Employee Self Service	Benefit Details
	Manager Self Service	2
·	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:

Favorites 🗸 Main Menu 🗸 >> Organizational Development 🗸 >> Position Management 🗸 >> Maintain Positions/Budgets 🗸 >>	Add/Update Position Info
University of Colorado Newtor Courses Service Denver America Market Courses User: ABEY000135 on Database: HCMTST	All - Search
Add/Update Position Info	
Enter any information you have and click Search. Leave fields blank for a list of all values.	
Find an Existing Value	
Search Criteria	
Position Number begins with 🔻	
Description begins with v	
Position Status = v	
Business Unit begins with 🔻	
Department begins with V	
Job Code begins with ▼	
Reports To Position Number begins with V	
Include History Correct History Case Sensitive	
Search Clear Basic Search 🧟 Save Search Criteria	

2. Click the Add a New Value tab.

Caution: Do not enter a Position Number. Leave the default of 00000000. HCM will assign a unique position number after you save your request.

3. Click Add. The Position page appears at the Description tab.

Description Specific Information Budget and Incumbents	<u>C</u> U Position Data
Position Information	Find View All First 🕢 1 of 1 📀 Last
Position Number 00000000	+ E
Headcount Status	Current Head Count 0 out of 0
*Effective Date 07/07/2017	*Status Active V Initialize
Reason NEW Q New Pos	sition Action Date 07/07/2017
Position Status Proposed	Status Date 07/07/2017

- **Note:** The system displays 00000000 as the Position Number until you save. It also displays a Position Status of Approved, which will change to Proposed after you enter a Department later in the procedure. Do not enter a position number. If you want to update a specific position, refer to *Updating a Position Step-by-Step Guide* for more information.
- 4. In the **Effective Date** box (located in the Position Information section), type or select an effective date.

Position Information				Find View All	First 🕚 1 of 1	Last
Position Number 00000000						+ -
Headcount Status		Current Head Count	0 ou	ut of 0		
*Effective Date 05/30/2017			*Status A	Active 🔻	Initialize	
Reason NEW Q	New Position	А	Action Date 0	05/31/2017		
*Position Status Approved	Ŧ	Status Date 05/31/2017	0	Key Position		

- 5. From the **Reason** box, keep the default of **NEW**.
- 6. Locate the **Job Information** section on the page. In this section, the Business Unit will default based on your security, which determines the workflow routing for your campus.

Job Information	
*Business Unit USYS Q System Administration	
Job Code 2280 Communication Director	
*Reg/Temp Regular V	*Full/Part Time Full-Time
*Regular Shift Not Applicable	Union Code
Title Communication Director	Short Title Comm Dir Detailed Position Description

7. If you need to change the Business Unit, from the **Business Unit** box, click the look up and select your campus.

View 100 F	irst 🕚 1-6 of 6 🕑 Last
Business Unit	Description
UAMC	Anschutz Medical Center
UCB	Boulder Campus
UCCS	Colorado Springs Campus
UCD	Denver Campus
UCOLO	University of Colorado
USYS	System Administration

- 8. Type or select the **Job Code** and press **Tab**. The system populates the remaining fields.
- 9. From the Reg/Temp list box, select either Regular or Temporary.
- 10. Press Tab to move to the Full/Part Time list box, and select either Full-Time or Part-Time.
- 11. Allow the **Regular Shift** field to default to the value of **Not Applicable**.
- 12. Leave the Union Code field blank.
- 13. The Title field displays the default title associated with the Job Code. If you want a different title, delete the default title and type the new working title.

14. Locate the **Work Location** section on the page.

Work Location		
*Reg Region USA	United States	
Department 50020	Employee & InformationServices	Company CU University of Colorado
Location 5UCA	Confice of the President	
Reports To	2	Dot-Line Q
Supervisor Lvl	2	Security Clearance

- 15. In the Reg Region field, leave the default of USA.
- 16. Either type or click the **Department** look up and select the correct department code. After you enter Department, the Position Status updates to Proposed.

To display a list of departments for a campus:

- a. Type the first number associated with that campus. For example, type 1 to display Boulder department codes. The following numerals are associated with each campus: 1 (CU Boulder), 2 (Anschutz Medical Campus, or AMC), 3 (CU Denver), 4 (UCCS) and 5 (System Office).
- b. Click the look up to select a value.
- 17. Press **Tab** to move to the **Location** field, which will display a default location according to the selected Department code. Use the look up if you want to select a different value.
- 18. In the **Reports To** field, type a value, or select a value from the look up. The Reports To value is the position number of the supervisor to whom the position you are creating reports to. The Reports To position must also be encumbered (funded position).
 - **Note:** If you are planning to recruit for this position using CU Careers, the Reports To field must have a value, and the select Reports To position must have an incumbent; that is, the Reports To position cannot be vacant.
- 19. Locate the **Salary Plan** information section on the page.

Salary Plan Information							
Salary Admin Plan 228			Grade A00 🔍 Step				Q
Standard Hours 40.00			ork Period	W I	Q We	ekly	
	Mon 8.00	Tue 8.00	Wed 8.00	Thu 8.00	Fri 8.00	Sat	Sun

- 20. Allow **Salary Admin Plan**, **Grade**, and **Work Period** to default according to the Job Code. Do not edit these fields.
- 21. Edit Standard Hours. The Standard Hours field will default according to the Job Code, but you can update it, if necessary. What you enter as the Standard Hours value will determine the Full-Time Equivalency (FTE) value. Standard hours determine eligibility for benefits. Employee who work 20 or more standard hours in a weekly work period are eligible for benefits. Contact HR for assistance if you are unsure what the standard hours should be.
- 22. If needed, click the USA flag ^{IIII} USA to update **FLSA Status**. (Exempt or Non-Exempt)

23. Click the Specific Information tab.

Des	cription Specific	: Information	Budget and Incumbents	CU Position Data				
		Position Nu	mber 00000000					
		Headcount S	tatus		Curr	ent Head Count	0 0	ut of 0
S	pecific Information	1			6		Find	I View All First 🕚 1 of 1 🕑 Last
		Effective	e Date 07/31/2017		45		Statu	s Active
		Max Head	Count 1					Incumbents
		Mail D	rop ID					Update Incumbents
		Work F	hone					Force Update for Title Changes
		Health Cert	ificate	\sim				Budgeted Position
		Signature Aut	hority		\sim			☐ Confidential Position ☐ Job Sharing Permitted
								Available for Telework
	Education and	d Governmen	t					
		Position	Pool ID					
	*Pre-Ei	ncumbrance Ir	dicator Encumber Immedia	ately	\sim	Calc Group	p (Flex Serv	ice)
	*En	cumber Salary	Option Salary Step		\checkmark	1	Academic R	ank
		*Classified Ir	dicator Surviving Spouse	\sim		F	TE 1.0000	00 Adds to FTE Actual Count

- 24. Do not select the **Update Incumbents** box when creating a position. If this box is selected for a new position, the system will display an error when you save (new positions don't have incumbents).
- 25. Under the Education and Government section, select the **Classified Indicator** appropriate for the position.

	Education and Government	Fellowship High School/Trade School/Oth	
	Position Pool ID	Medical Resident None	
		Off Cpm WS	\sim
		Officer/Exempt/Professional	
	*Encumber Salary Option		\sim
	1	Other State Institutions	
	*Classified Indicator	Regular Faculty	
		Research Faculty	

- 26. Ensure that the **FTE** value is correct. This number is a calculated field that will correspond proportionally to the indicated Standard Hours.
- 27. Click the CU Position Data tab.

28. 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 Ca	ampus Box				
					Help
Ca	ampus Box begins with 🔻				
D	Description begins with 🔻				
Depr	artment ID begins with 🔻		Q		
Department D	Description begins with v 50001		1		
Loca	ation Code begins with 🔻		Q		
Location D	Description begins with 🔻				
Look Up	Clear Cancel Basic Looku	qı			
Search Resi					
	300 results can be displayed.				
View 100					First 🕚 1-300 of 300 🕑 Last
	Description	Department ID	Department Description	Location Code	Location Description
003 UCA	Board of Regents	50001	Board of Regents	5UCA	Office of the President

29. Click **Save** from the bottom of the page. This system displays *Saving* in the top right corner of the page and then displays the CU Funding Entry page with the position number and effective date populated from your saved position.

CU Funding Earnings	CU Funding Entry	Deductions	CU Funding Entry Taxes				
HRGL Request #:			ing Entry Status: Searched/I	Draft	Originato		
Created Datetime: 07/07/2017 3:31PM		Submitted Date Time:			Completed Date/Time:		
Funding Entry							
Position Number	00735400 🔍	Communic	ation Director				
Effective Date	07/07/2017						
Effective Sequence	0						

30. In the New Distribution Data section, enter the SpeedType and Percent of Distribution.

- Funding End Date and Project End Date default from the financial system (FIN) only if you are using a SpeedType associated with a grant or contract. For other types of funding, this field will not be auto populated because there is not always an end for funding. You can update Funding End Date if needed.
- **Budget Amount** is blank for a new position. Otherwise, when the position is tied to a specific employee's pay amount, it is tied to **Percent of Distribution.** When you change the amount, the percent will update when you tab through the fields.

• Click the plus button 🛨 to add rows and update funding by percentage. Total percent of distribution must equal 100.

Clear New E	istribution Grid	Apply to Next Fiscal Year									
New Distrit	oution Data										
ERNCD	SpeedType	SpeedType Description	Departs	ment	Project	Account	Fund Code	Program Code	PC Business Unit		
1	51088135 🔍	Management Training	51005	Q	Q	44444	10	46199			
										Personalize Find Vier	
					PC Business	Unit	Activity	Funding En	d Date Project End	d Date Chartfield Descr	Budget Amount Percent of Distribution
									101	Chartfield Descr	100.000 +

31. Click **Save/Submit** from the CU Funding Earnings tab. HCM saves the funding entry and returns you to the Position Information page. Note the new position number and the HRGL Request number on this page. You can use this HRGL Request number to confirm that the funding entry status has changed to Completed once the position has been approved. Be sure to confirm the funding posted in Position Funding History.

Description Specific Information Budget	and Incumbents CU Position Data				
Position Number 00735234 Headcount Status Open	Current Head Count 0	out of 1			
Position Information		Find View All First 🕢 🖓 of 1 🕑 Last			
Effective Date	07/31/2017	Status Active			
Campus Box Request # SIED000017-20170731-001					
Submit					

32. Click Submit. The workflow associated with the Business Unit and job code will appear.



The position now has the status of Submitted and will go through the approval process. Once the position is approved:

- Data changes are written to the HCM tables.
- The status of the request is updated from Pending to Approved. The HRGL Request will update to Completed and the funding will post to the department budget table with the indicated funding.

After the position is approved, you can create the Non-Person Profile (NPP) and recruit for it through the applicant tracking system. Refer to *Creating or Updating and NPP Step-by-Step Guide* for more information.

Updating a Denied Position

If your position is denied, you will receive an email notification as to why it was 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.

Description	Specific Information Budge	et and Incumbents	CU Position Data						
Position Infor	mation					Find View All	First	1 of 1	🕑 Last
	Position Number 007034	479							+ -
	Headcount Status Filled			Current Head Coun	t 1 (out of 1			
	*Effective Date 07/01/20)17 🛐			*Status	Active V			
	Reason OTH C	Other - O	Comment Required		Action Date	07/14/2017			
	Position Status Denied		Status Date	02/04/2013		Key Position			
Job Inform	nation								

- 4. Click the plus button 1 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.

Note: If you must use the same effective date as the denied position row, then you must create a new position using the Initialize button as described in the following step,

9. Click the **Initialize** button to clone your denied position. This creates a position with a new position number but with all the same information. The Initialize button only appears on new positions.

Description Specific Information Budget and Incumbents CU Position Data
Position Information Find View All First 🚯 1 of 1 🛞 Last
Position Number 00000000 + -
Headcount Status Current Head Count 0 out of 0
*Effective Date 07/18/2017 🕞 *Status Active 🗸 Initialize
Reason NEW Q New Position Action Date 07/18/2017
Position Status Approved Status Date 07/18/2017 间 🗌 Key Position
Job Information
*Business Unit USYS Q System Administration

HCM Step-by-Step Guide | hcm_sbs-Creating-Position-Funding.docx Revised: August 3, 2017 | Prepared by: Employee Services The following message appears:

Default Position Data					
Enter an Effective Date and select Position Number to default from					
Effective Date 07/18/2017					
Position Number Q OK Cancel					

- 10. Enter the effective date and the position number of your denied position.
- 11. Click **OK**. HCM populates the denied position's data into a new position with a Position Status of Proposed.

Description Specific Information Budget and Incumbents CU	Position Data
Position Information	Find View All First 🕚 1 of 1 🕑 Last
Position Number 00000000	+ -
Headcount Status	Current Head Count 0 out of 0
*Effective Date 07/18/2017	*Status Active VIIIIialize
Reason NEW Q New Position	Action Date 07/18/2017
Position Status Proposed	Status Date 07/18/2017 B Key Position
Job Information	

- 12. Make the necessary changes that were outlined in the notification and click Save.
- 13. Go to Step <u>30</u> of the Creating a Position procedure. This is the point in the process where you specify and save the funding information and then resubmit your position for approval 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.