University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus
EMPLOYEE SERVICES

# 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*.

## Contents

# 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:

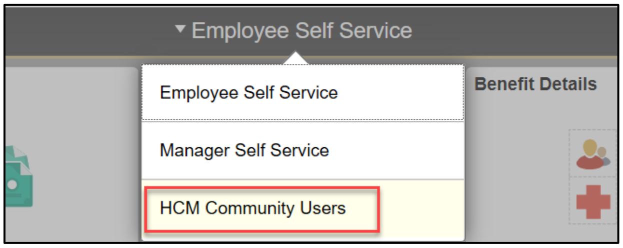
- The non-person profile is referred to as NPP throughout this document.
- The NavBar displays options for accessing other systems. Through the NavBar, you can select CU Resources to access systems on the portal.
- The looking glass is called a look up and displays search results for you to select valid 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.

# Creating a Position

To create a position:

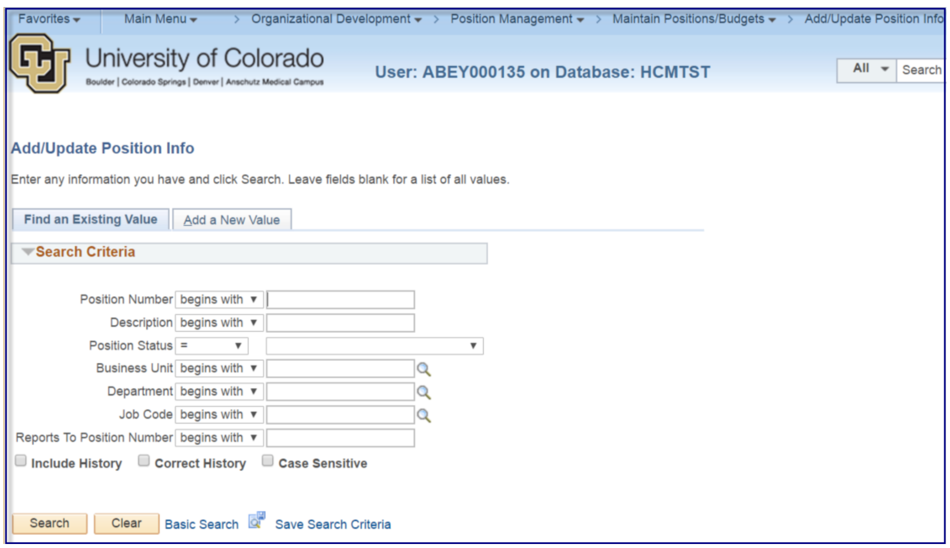
1. Navigate to Add/Update Position Info.
    a) Go to HCM Community Users dashboard: **NavBar**> **CU Resources**> **Business Tools**> **HCM**> **Employee Self Service**> **HCM Community Users**




    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**.

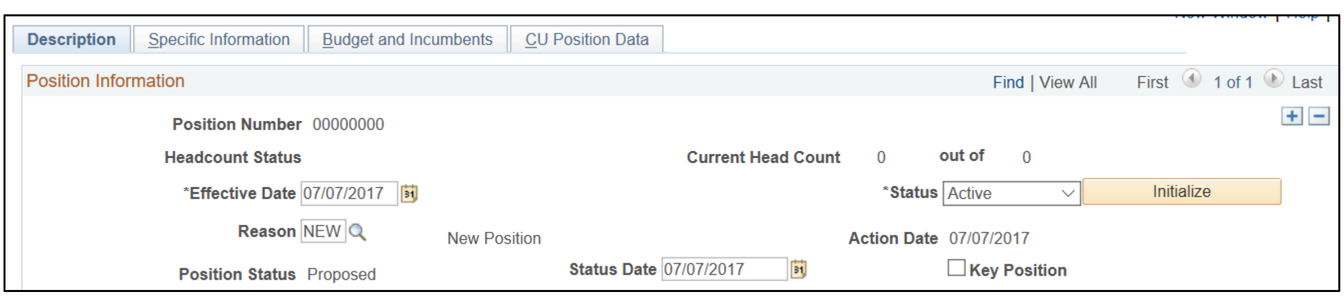
    The Add/Update Position Info page appears:




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.

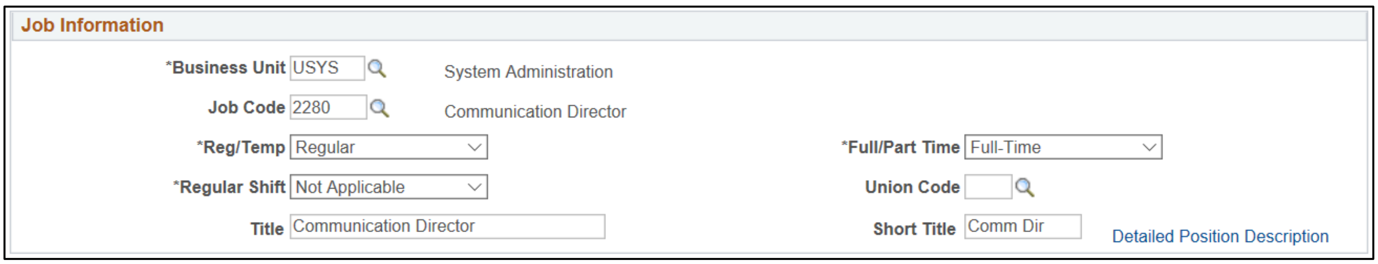
3. Click **Add**. The Position page appears at the Description tab.



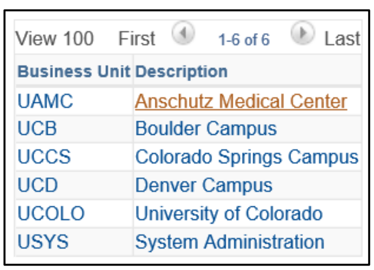
**Note:** The system displays 00000000 as the Position Number until you save. It also displays a Position Status of Approved, which will change to Proposed after you enter a Department later in the procedure. Do not enter a position number. If you want to update a specific position, refer to *Updating 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.


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.

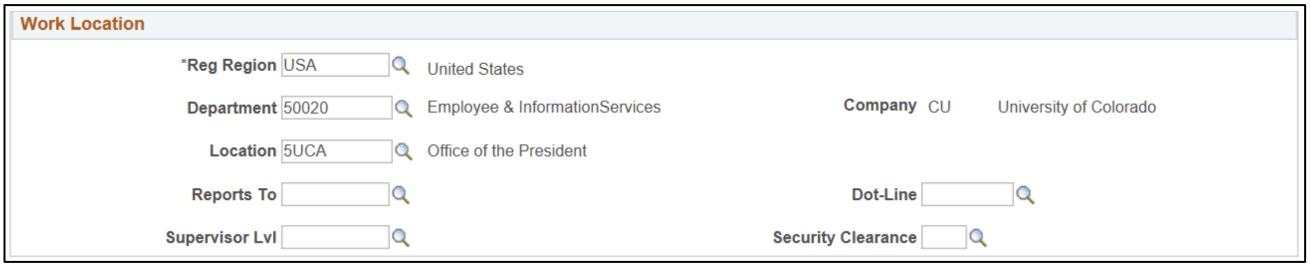



7. If you need to change the Business Unit, from the **Business Unit** box, click the look up and select your campus.




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.



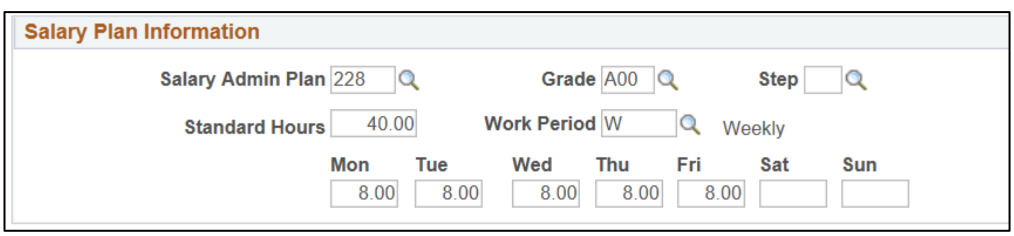

15. In the **Reg Region** field, leave the default of **USA**.
16. Either type or click the **Department** look up and select the correct department code. After you enter Department, the Position Status updates to Proposed.

    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).

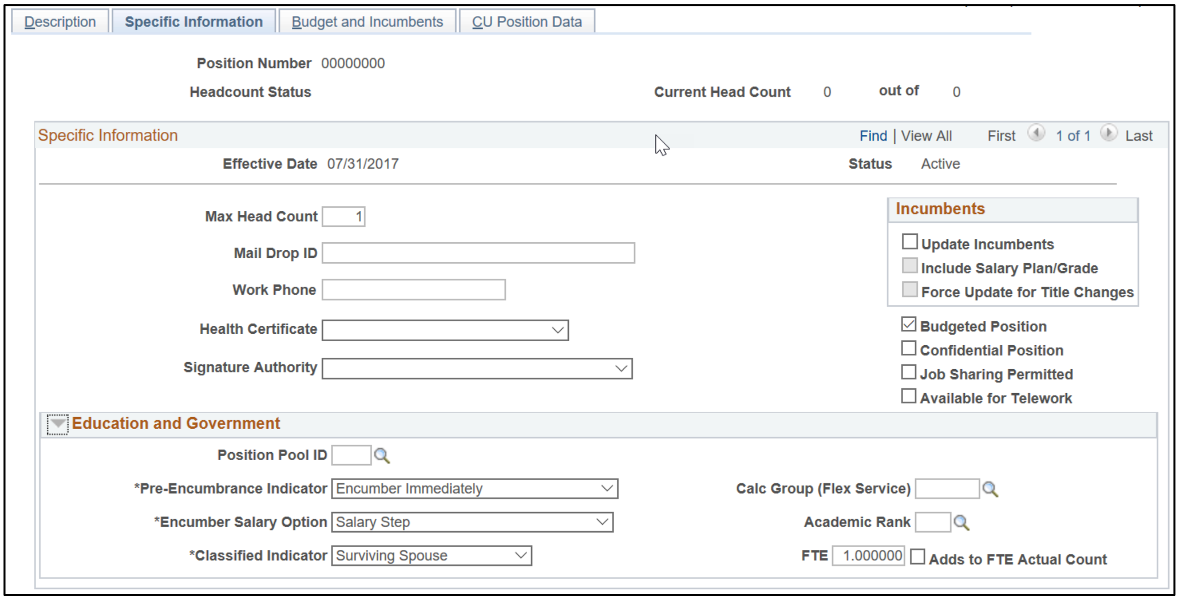
    **Note:** If you are planning to recruit for this position using CU Careers, the Reports To field must have a value, and the select Reports To position must have an incumbent; that is, the Reports To position cannot be vacant.
19. Locate the **Salary Plan** information section on the page.




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 

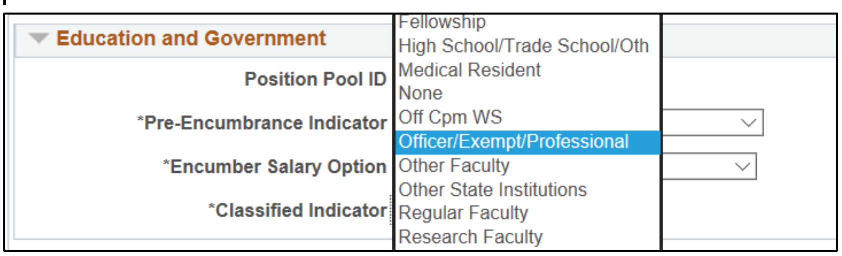
to update **FLSA Status**. (Exempt or Non-Exempt)

23. Click the **Specific Information** tab.




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).

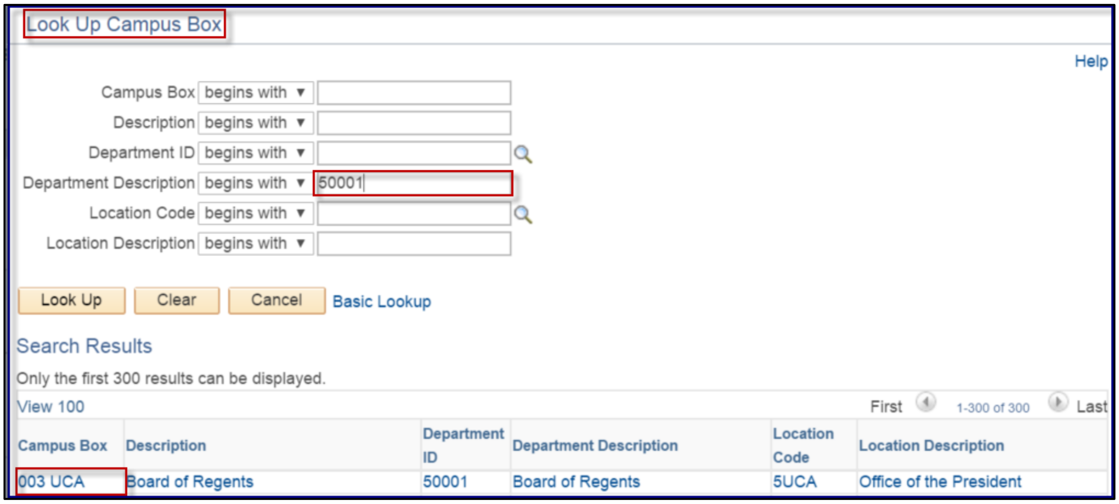
25. Under the Education and Government section, select the **Classified Indicator** appropriate for the position.



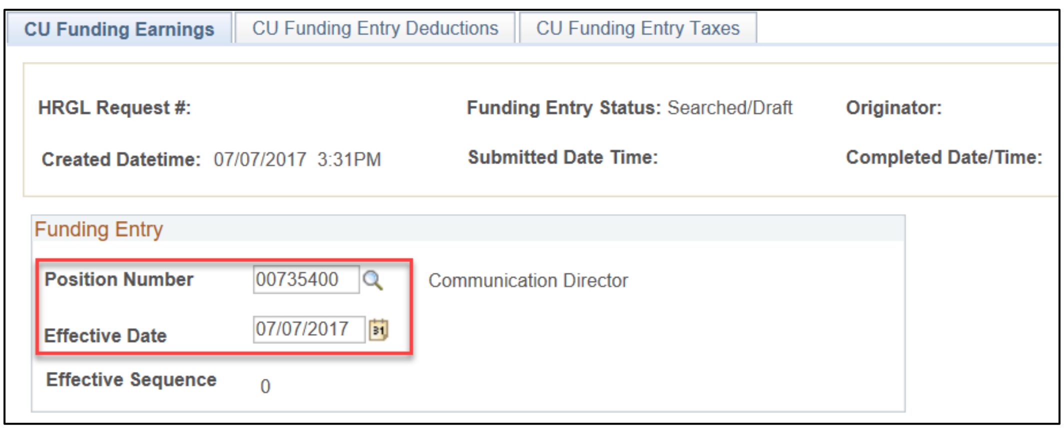

26. Ensure that the **FTE** value is correct. This number is a calculated field that will correspond proportionally to the indicated Standard Hours.

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.



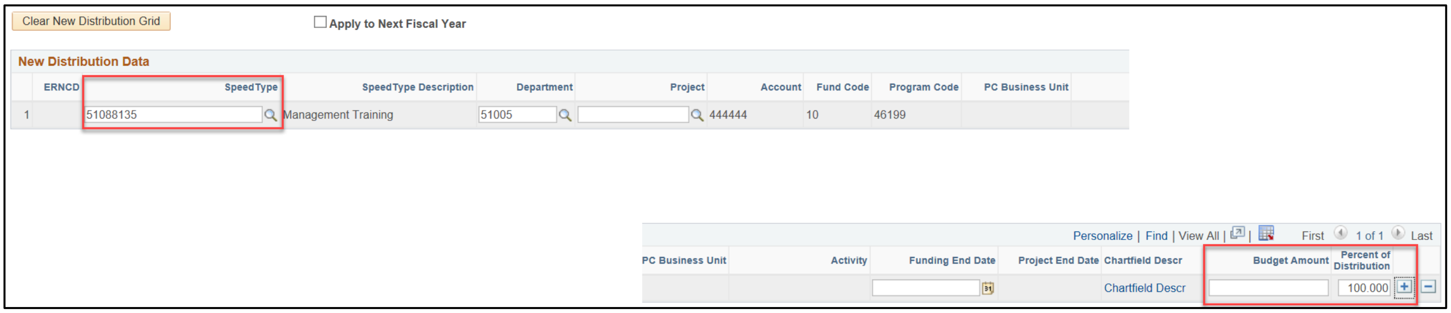

29. Click **Save** from the bottom of the page. This system displays *Saving* in the top right corner of the page and then displays the CU Funding Entry page with the position number and effective date populated from your saved position.



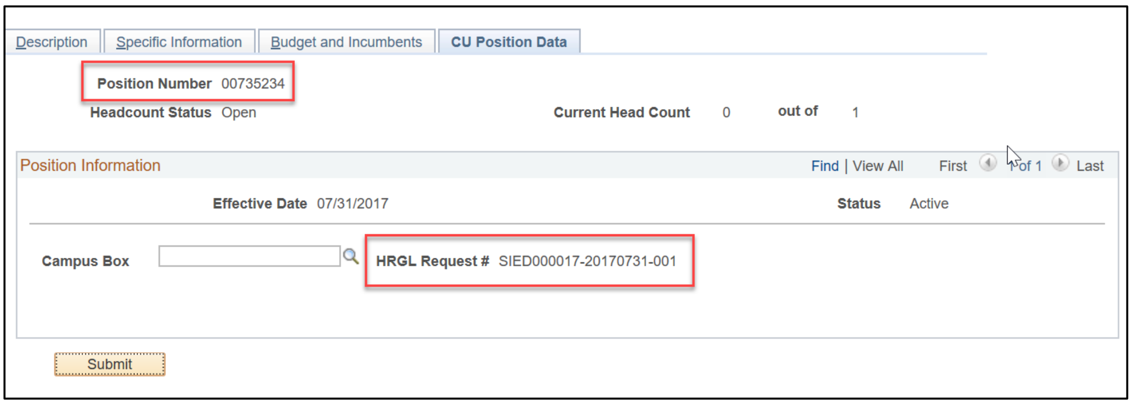

30. In the **New Distribution Data** section, enter the **SpeedType** and **Percent of Distribution**.

- **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.

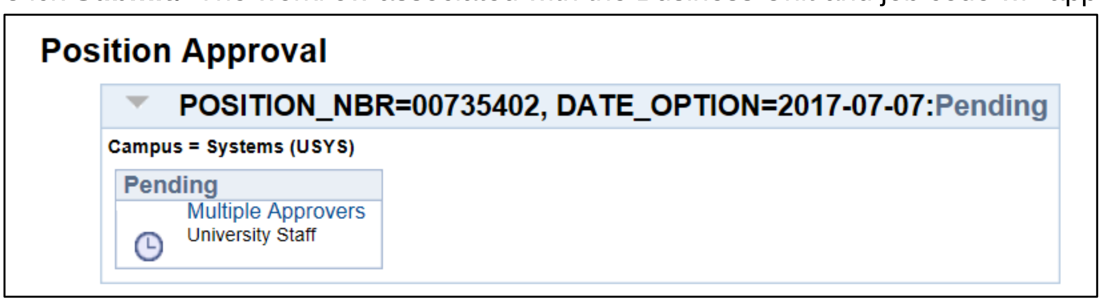
- Click the plus button to add rows and update funding by percentage. Total percent of distribution must equal 100.




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.




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.

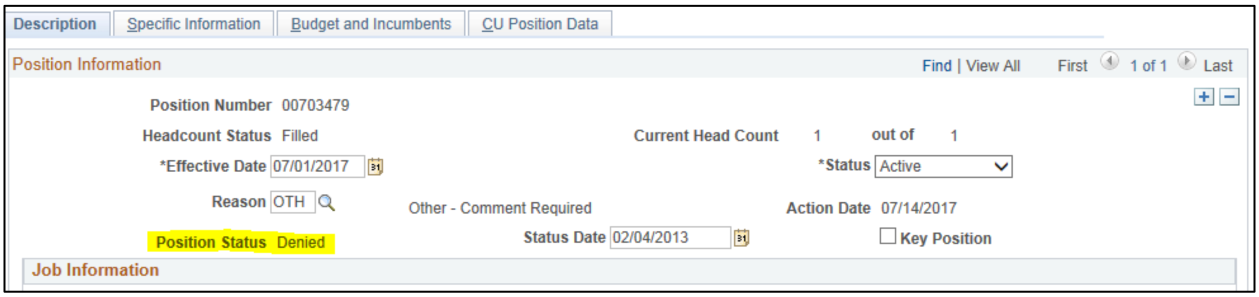
After the position is approved, you can create the Non-Person Profile (NPP) and recruit for it through the applicant tracking system. Refer to *Creating or Updating and NPP Step-by-Step Guide* for more information.

# 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**.

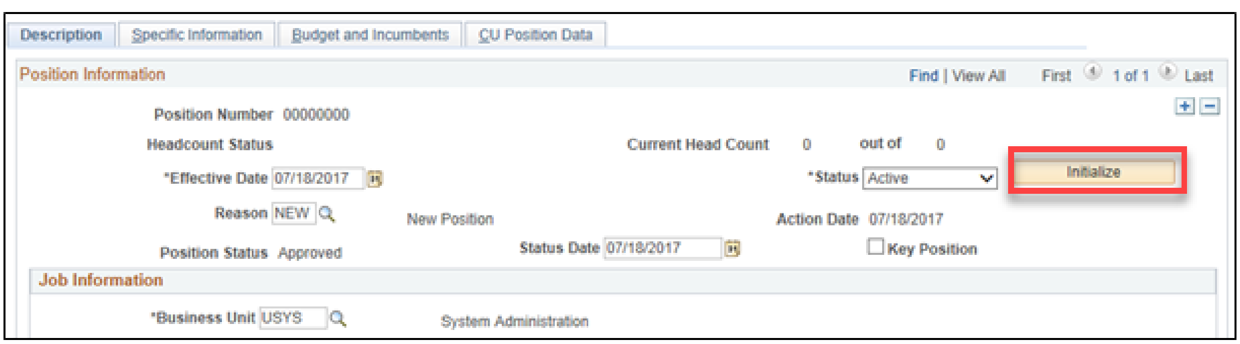
   The Position page appears at the Description tab showing the Position Status as Denied.



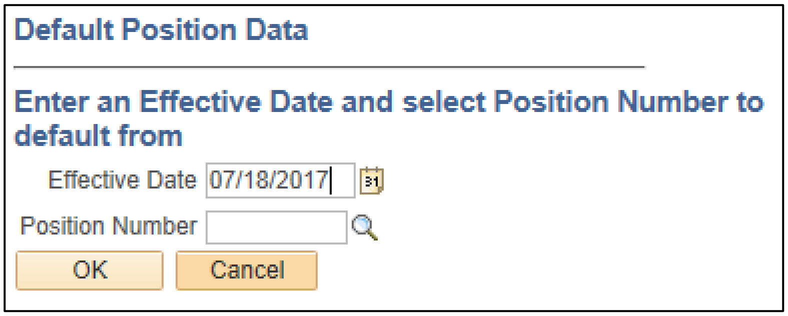

4. Click the plus button **+** to add a row.
5. In the **Effective Date** box (located in the Position Information section), type or select a date that is one day greater than the existing effective date. The Position Status changes to Proposed.
6. From the **Reason** box, select the reason for the update.
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.

   **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,

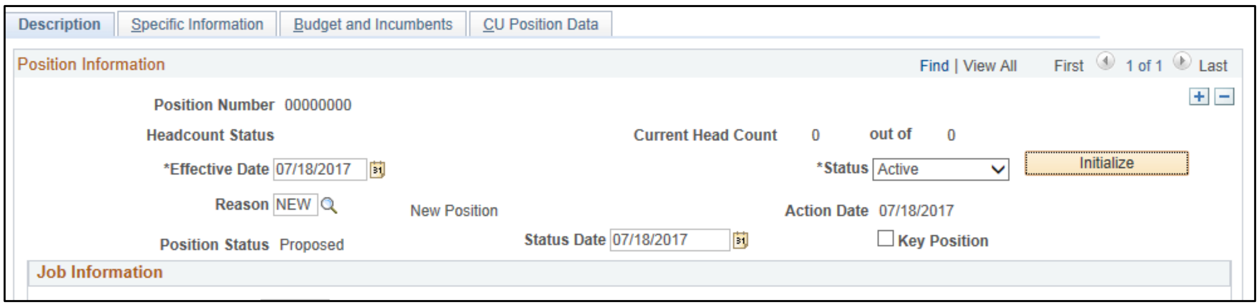
9. Click the **Initialize** button to clone your denied position. This creates a position with a new position number but with all the same information. The Initialize button only appears on new positions.



The following message appears:




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.




12. Make the necessary changes that were outlined in the notification and click **Save**.
13. Go to Step 30 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.