HRMS Basics

Fall 2009

HRMS
human resource management system
Overview/Class Objectives

Part 1: Presentation
- What is HRMS?
- HRMS concepts and terms
- Position/Incumbent/Funding relationship
- Highlights from Phase 1
- What’s coming with Phase 2
- General FAQ
- Knowledge Check
Overview/Class Objectives

- Part 2: Hands-on
  - Left navigation
  - Help!
  - Quick search
  - HRMS system navigation
  - Straight updates to positions and incumbents
What is HRMS?

- Historically, actions in the DEFINE appointment-based system have been driven primarily by account number.
- In a position-based system, the position represents the organizational home of the incumbent/employee.
What is HRMS?

Organizational hierarchy

University of Texas at Austin

Unit A
- Position
- Position

Unit B
- Position
- Position
What is HRMS?

- The Human Resource Management System (HRMS) is a Web-based integrated solution to human resource, employee, and payroll services.
- HRMS is a Web application that helps you manage your workforce.
- Development is spearheaded by the university’s business services council.
- Departments across campus provided collaborative efforts to develop the system.
What is HRMS?

- Phased approach
  - Phase 1 went live November 3, 2008
    - A&P/Classified/Teacher/Librarian positions
    - Replaced RPM system
  - Phase 2 scheduled launch date November 2, 2009
    - Faculty & student positions
    - Assignments that create appointments
    - Incumbent
    - Funding
**HRMS concepts & terms**

- **Position**
  - A collection of attributes, responsibilities, and tasks.
  - Position ID ####AA unique to each position.

- **Employee**
  - Individual with an employment relationship with the university.

- **Incumbent**
  - Individual currently assigned to a position.

- **Assignment**
  - Relationship between an incumbent and a position. Assignments connect incumbents to the positions they hold.
HRMS concepts & terms

- Difference between *incumbent* and *employee* in HRMS
  - In HRMS, incumbent describes the relationship an individual has to a *position*, whereas employee describes the relationship between an individual and the *university*, including information on all positions that person has held.
HRMS concepts & terms

• Difference between *appointments* and *assignments*
  • Appointment
    • Transaction-based and affects payroll/getting people paid
    • Based on fiscal year and account
  • Assignment
    • Fuller description of an incumbent’s relationship to his/her position, in addition to including information once found through appointments (prior to November 1, 2009)
    • Can display across fiscal years
When the assignment begins, the incumbent inherits the attributes of the position and is paid from the funding source(s).
When the incumbent leaves, the position stays on the org chart (non-faculty only), is vacant, and retains its attributes and funding source(s).

The position can then be filled by another incumbent.
Highlights from Phase 1

- Created a foundation for positions and the concept of position management
- A&P/Classified/Teacher/Librarian positions
- Replaced the RPM system for recruiting
- Made reporting structure clearer with direct Reports to capability
- Supervisors can view a list of their direct reports
- More open security model, allowing more access to data
Highlights from Phase 1

- Benefits of having position data
  - Identify positions as unique entities within the workforce, each with a specific set of attributes
  - Establish a structure of reporting relationships
  - Capture and report on position-related information
    - Analyze the growth or decline of positions within specific workforce sectors
    - Evaluate modifications to positions over time
- Retain position attributes
- Modify positions as needed
<table>
<thead>
<tr>
<th>What’s coming with Phase 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Funding</td>
</tr>
<tr>
<td>• Incumbent</td>
</tr>
<tr>
<td>• Appointment creation from HRMS via assignments</td>
</tr>
<tr>
<td>• Faculty and student positions</td>
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<tr>
<td>• New type of position – Affiliated Worker</td>
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<tr>
<td>• Pooling (new) of student and affiliated worker positions</td>
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</tbody>
</table>
• When will Phase 2 go live?
  • November 2, 2009

• What about security and routing?
  • Authorizations and document routing are set up in DEFINE by electronic office managers/delegates using new HRMS commands

• Do I have to learn all the new commands?
  • No! The system creates the appropriate documents based on the action you choose
  • The command is embedded in the document ID
General FAQ

- **Will I have to create all my positions?**
  - No! Data conversion at go-live

- **Where can I find out about training?**
  - TXCLASS
  - Your college/VP area’s project liaison

- **What classes will be offered?**
  - Basics (PN750)
  - Faculty (PN751)
  - Student (PN752)
  - A&P/Classified (PN754) Phase 2 update for current users
    - HRS will continue PN704 class on recruiting
  - Affiliated Worker (PN753)
General FAQ

- **Where can I get help?**
  - Online Help
  - Your area’s Project Liaison
  - HRS Representative
    - [http://www.utexas.edu/hr/hrpro/lookup/](http://www.utexas.edu/hr/hrpro/lookup/)
  - AskUs knowledge database
    - [https://austin-utexas.custhelp.com](https://austin-utexas.custhelp.com)
  - HRMS Support after go live
  - Open work sessions
Knowledge Check

1. When will HRMS Phase 2 go live?
2. How will appointments be created after Phase 2 goes live?
3. Who sets up security and routing?
4. How many new commands do you have to learn with Phase 2?
Questions?
A word about the test environment

- We are using a test environment called QUAL
- Data is real but not live
- Changes made in QUAL do **NOT** affect data in production
- QUAL is refreshed once a month with current production data
- Open Firefox browser

https://qual.its.utexas.edu/hrmsd

- Log in with your EID and EID password
Left Navigation

A link to your DEFINE inbox

Tools
- HRMS Help
- My HRMS Roles
- Allocation Calculator
- Annual Rate Calculator

Reports

Other Resources
- Human Resource Services
- Account Balances
- Job Code System
- Job Search

Tools
- Online help
- HRMS roles
- Rate calculators

Other HR resources
Quick Search

Search by any of these criteria
HRMS Navigation: Home

Documents
- My Inbox
- View my last 10 documents
- View last 10 documents created in unit: [ ] Go

Positions
- Create a new position

News and Announcements
There are no announcements at this time.

Application Use Policy
HRMS Navigation: Position

*Position* is where most of the action takes place in HRMS. It's where you put information into the system and create documents for routing.

You can:

- *Browse* positions by unit code
- View position *Details* and modify, assign, reclassify, recruit, create new
- View the position *Incumbent* and create assign or modify documents from that page
- View *Funding* for the position and create modify documents to change funding
- View position *History*
On the **Employee** tab you can:

- View an employee’s *history*
- View an employee’s *profile* — service-related information, leave balances, etc.
- View and request changes to an employee’s *authorizations* on some UT systems and applications
On the **Recruiting** tab you can:

- Search for Recruiting Summaries by posting number or document ID
- Search for Recruiting Summaries by unit
- Manage applicant data in those Recruiting Summaries
HRMS has a robust *Search* capability to help you find what you’re looking for:

- Search *positions*
- Search *documents*
HRMS Navigation: Search

3+ options for searching documents

Option 1: Enter the UT EID of a document creator to see a list of HRMS documents they have created by document type.

Option 2: If you know the day a job posting opened, enter that date here. You may also enter a date range. (Leave end date blank for jobs opening on one date only.)

Option 3: Search for documents related to a posting ID
The **Document** tab will help you navigate to:

- your DEFINE *inbox*
- document *search* features
- the *last 10 documents* you created in HRMS
- the *last 10 HRMS documents created in a unit*
- indicates when you are in an HRMS document