HRMS A&P/Classified/Teacher/Librarian Positions
Phase 2 Update

Fall 2009
Overview/Class Objectives

- Part 1: Overview of new Phase 2 functionality
  - HRMS concepts and terms
  - Position/incumbent/funding relationship (non-faculty)
- What’s changed from Phase 1
- What’s coming with HRMS Phase 2
- General FAQ
- Knowledge Check
Overview/Class Objectives

• Part 2: Hands-on HRMS
  • Navigation –Phase 2 update
  • Views/straight updates
  • Modify A&P/Classified positions
  • Reclassify a filled position
  • Recruiting Summary Hire page - demo
  • Assign to non benefits eligible position - demo
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, is vacant, and retains its attributes and funding source(s).

The position can then be filled by another incumbent.
HRMS concepts & terms

- **Default Account**
  - Account(s) set up that allow an assignment to be processed to completion even if the assignment has no funding.
  - To be used sparingly, intended to be used as a last resort option at payroll processing time.
What’s changed from Phase 1

• Document navigation – no more carousel
  • Sections of the document appear in the left nav
• Straight updates on Position Details and Incumbent tabs
• Employee assignment listing on Employee History
• New action links and documents to modify positions, incumbents, and funding
What’s changed from Phase 1

• New start pages for create new positions
• Changes to Reclassify a Filled
• Assignments on Hire page of Recruiting
  Summary required
  • Appointments generated automatically via assignments
## What’s coming with HRMS Phase 2

- Funding
- Incumbent
- Faculty and student positions
- New type of position – Affiliated Worker
- Pooling (new) of student and affiliated worker positions
- Appointment creation from HRMS via assignments
<table>
<thead>
<tr>
<th><strong>General FAQ</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>When will Phase 2 go live?</strong></td>
</tr>
<tr>
<td>• November 2, 2009</td>
</tr>
<tr>
<td><strong>What about security and routing?</strong></td>
</tr>
<tr>
<td>• Authorizations and document routing are set up in DEFINE by electronic office managers/delegates using new HRMS commands</td>
</tr>
<tr>
<td><strong>Do I have to learn all the new commands?</strong></td>
</tr>
<tr>
<td>• No! The system creates the appropriate documents based on the action you choose</td>
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</tbody>
</table>
General FAQ

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

- **What classes will be offered?**
  - Basics – PN750
  - Faculty – PN751
  - Student – PN752
  - A&P/Classified – PN754
    - HRS still offering PN704 (create new, reclass, recruit)
  - 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/
    • AskUs knowledge database
      • https://austin-utexas.custhelp.com
  • HRMS Support after go live
    • Open work sessions
Questions?
Knowledge Check

1. When will HRMS Phase 2 go live?
2. What is an incumbent?
3. How will appointments be created once Phase 2 launches?
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
Navigation review & Phase 2 update

A link to your DEFINE inbox

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

Online Help
HRMS roles
Rate calculators

Reports

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

Other HR resources

HRMS
human resource management system
Navigation review & Phase 2 update

Search by any of these criteria
Navigation review & Phase 2 update

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, reclassify, recruit
• View the position *Incumbent* and assign or modify from that page
• View *Funding* for the position and modify
• View position *History*
Navigation review & Phase 2 update

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 a document