

Exercises - A&P/Classified Positions

Use Firefox browser and enter the URL <https://qual.its.utexas.edu/hrmsd>

Exercise 1: Position Views/Straight Updates**1a: Browse Positions/Position Details/Straight Updates**

1. In the Quick Search, enter your EID.
2. Click your position ID to get to Position Details.
3. Write your position ID. _____
4. In the section called General Information, click **edit**.
5. In the Position Title field, enter Amazing Worker.
6. Click **save** and view changes.
7. Click the blue history icon (arrow) and view history of changes.
8. Close the popup window.
9. In the section called Location Details, click **edit**.
10. On Work Location, use the drop-down menu to change Work Location to a different location and **save**.
11. List at least four other items that can be changed using straight updates on the Position Details page.

1b: Incumbent View/Straight Updates

1. There are two ways to get to incumbent view:
 - a. On the Position Details page, under the section called Position Information, click the Incumbent's (your) EID.
 - b. Or, click the Incumbent tab in the second-level navigation.
2. Note the navigation tabs - you are now on the Position>>Incumbent page.
3. Scroll to the section called Location Information, click **edit**.
4. Change Residency State to LA and save.
5. View changes.
6. What action options do you see at the top right of this page?

1c: Funding View

1. Click the **Funding** tab.
2. View funding for your position.
3. Are there any edit links on this page? _____
4. What action links do you see at the top right of this page? _____

1d: History View

1. Click the **History** tab.
2. View history for your position back to November 2008.

1e: Employee Assignment View

1. Go back to **Position>>Details**.
2. Click the **Employee** tab.
3. Default view is appointment history, similar to AL1 screen in DEFINE. Enter view as of 1972.
4. Click **Assignment History**.
5. View a listing of your assignment history in HRMS back to November 2008.

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Exercise 2: Modify A&P/Classified

2a: Modify A&P/Classified – Start page

1. Go to **Position>>Details**.
2. Enter your position ID and **Go**.
3. Click **Modify** at the top right of the page.
4. Check the Creator Desk information for accuracy. Change if needed by clicking the lookup tool.
5. Click **Walk me through**.
6. Look at the left navigation and list the sections of the document.

7. Note that the top navigation indicates you are in a document.

2b: Modify A&P/Classified – General section

1. What attributes of the position can you change on this section?

2c: Modify A&P/ Classified – Incumbent section

Please note: Several modifications to incumbent are possible, and in the “real world” you would likely not do all of the modifications listed below on a single document.

1. In the left navigation, click **Incumbent**.
 - a. **Example 1: Separation**
 - i. Enter an end date for the incumbent.
 - ii. Note that two drop-down menus appear.
 - iii. Under Reason, click the drop-down menu.
 - iv. What options are available?

- v. Select a separation reason.
- vi. Under Reemployment Recommendation, click the drop-down menu.
- vii. What options are available?

- viii. Select Eligible for Reemployment.
- ix. For the purposes of this exercise, delete the end date.

Exercises - A&P/Classified Positions**b. Example 2: Adjustments to Base Pay**

- i. In the section called Adjustments to Base Pay, click **Add Pay Adjustment**.
- ii. Click the drop-down menu.
- iii. What Adjustments to Base Pay are Possible?

- iv. Click **undo**.

c. Example 3: Additional Pay

- i. In the section called Additional Pay, click **Add Additional Pay**.
- ii. Click the drop-down menu,.
- iii. What Additional Pay selections are possible?

- iv. Click **undo**.

d. Employment of Close Relatives

- i. Scroll to Employment of Close Relatives.
- ii. In the text box, enter Mother is Tina Training in English Department.
- iii. Click **Save**.

2d: Modify A&P/ Classified – Leave Without Pay section

1. In the left navigation, click **Leave Without Pay**.
2. Click **Add LWOP**.
3. Using the drop-down menu, select Approved Leave of Absence.
4. What other selections are possible here?

5. Under Hours per Day, enter 4.
6. Using the calendar icons, select an Effective Date and End Date.
7. In Remarks, enter Doctor appointment.
8. Click **Save**.

2e: Modify A&P/Classified – Funding section

1. Click **Funding** in the left navigation.
2. On current funding line, click **edit**.
3. Enter an End Date of 12/31/2009 and **save**.
4. View UNFUNDED information.
5. Click **Add funding**.
6. Enter a valid salary account.
7. Enter a distribution of 100 and an effective date, but no End Date.
8. Click **Save**.

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2f: Document Review—review data, verify/approve

1. Click **Document Review** in the left navigation.
2. Click **Show** on all sections below the gray routing widget.
3. Review modifications to all sections.
4. Is it possible to continue making changes to each section? _____

Exercises - A&P/Classified Positions**Exercise 3 : Reclassify a Filled Position****3a: Reclassify a filled position – Browse to Position**

1. Go to **Position>>Details**.
2. Enter your position ID.
3. Click **Reclassify** at the top right of the page.

3b: Reclassify a filled position - Start page

1. Use the lookup tool to find a job code for the reclassification.
2. Enter the Proposed Job Code.
3. Enter a future effective date.
4. Check the Creator Desk and change if necessary by clicking the lookup tool.
5. Click **Walk me through**.
6. Reclassification document is created.
7. Note new navigation. How is the navigation different from HRMS Phase 1?

3c: Reclassify a filled position - General section

1. Enter a new phone number.
2. In General Position Notes, enter: Training exercise.
3. Click **Save & Verify**.
4. Correct any errors.

3d: Reclassify a filled position - Salary and Funding section

1. In the left navigation, click **Salary and Funding**.
2. Under Funding Information, click **edit**.
3. What can be edited here?

4. Can you edit the account or unit code? _____
5. Put an end date on the existing funding and **save**.
6. View UNFUNDED information.
7. Click **Add funding**.
8. Enter a valid salary account.
9. Enter a distribution of 50, an effective date and no end date.
10. Click **Add funding**.
11. Enter a valid salary account.
12. Enter a distribution of 50, with the same effective date as above and no end date.
13. Click **Save**.

3e: Reclassify a filled position - Purpose and Functions

1. In the left navigation, click **Purpose and Functions**.
2. Under Position Title, enter a working title.
3. Under Purpose, enter Create Budget spreadsheets.
4. Leave driving requirement set to No.
5. Enter at least two functions for the position.
6. Enter percent time for each function to add to 100.
7. Click **Save and Verify**.

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3f: Reclassify a filled position - Qualifications

1. In the left navigation, click **Qualifications**.
2. Enter a Preferred Qualification.
3. Click **Save and Verify**.

3g: Reclassify a filled position - Working Conditions

1. In the left navigation, click **Working Conditions**.
2. Select three working conditions.
3. Click **Save and Verify**.

3h: Reclassify a filled position - Justification

1. In the left navigation, click **Justification**.
2. Enter a short description of the organizational change.
3. Enter a short rationale for the position reclassification.
4. Click **Save and Verify**.

3i: Reclassify a filled position - Incumbent

1. In the left navigation, click **Incumbent**.
2. Enter Proposed Annual Salary as a whole number, within salary increase guidelines.
3. In the text box, enter: <your name> has exhibited all the qualifications for this proposed reclassification.
4. Click **Save and Verify**.

3j: Reclassify a filled position - Document Review

1. In the left navigation, click **Document Review**.
2. Review all sections of the document.
3. Click **Verify Document**.
4. Correct any errors.

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Exercise 4 : Steps to assign to non benefits-eligible position (demo)

4a: Assign non benefits-eligible - Browse Positions

1. Go to **Position>>Browse**.
2. Enter your unit code to obtain a listing of positions in your unit.
3. Scroll to a non benefits-eligible position.
4. Click on the position ID to go to **Position>>Details**.
5. Click **Assign**.

4b: Assign non benefits-eligible - Start page

1. Check the Creator Desk information for accuracy. Change if needed by using the lookup tool..
2. Enter the incumbent EID.
3. Click **Walk me through**. This creates a modify document.

4c: Assign non benefits-eligible - Incumbent section

1. Enter start date.
2. Enter hours per week.
3. Enter a rate.
4. Enter Employment of Close Relatives.
5. Click **Save**.

4d: Assign non benefits-eligible – Leave Without Pay section

1. In most cases, skip this section.

4e: Assign non benefits-eligible - Funding section

1. Click **Funding** in the left navigation.
2. View and change funding if needed.
3. Click **Save**.

4f: Assign non benefits-eligible - Document Review section

1. In the left navigation, click **Document Review**.
2. Click the **Show** links to display data entered on this document.
3. Review all information.
4. Click **Verify Document**.

Exercise 5 : Demo of JZ8 Recruiting Summary (demo)

5a: Recruiting Summary Hire section

1. Click on **Recruiting** tab.
2. Enter your unit code to obtain a listing of recruiting efforts in your unit.
3. Click the link to a JZ8 document.
4. In the left navigation, click Applicants.
5. Mark one candidate as hired.
6. In the left navigation, click Hire.
7. Under Hiring Information, enter offer date, start date and justification for hire.
8. Under Assignment Information, enter hours per week, rate and employment of close relatives.
9. Click **Save & Verify**.

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Optional Scenarios

1. An employee in your area is changing office locations and phone number. How would you make this change?
2. An incumbent/employee will be on Leave Without Pay for 3.5 days. You have their name and EID. How would you proceed?
3. An incumbent/employee is retiring from the university at the end of the month. What steps do you take to enter this information in HRMS?
4. A position in your organization needs a recruitment effort for a vacant position. What steps will you take to fill this existing position?
5. The funding for your position is being changed. You will now be funded 75% on the existing account, and 25% on a different account. What will you need to do in HRMS?
6. You are being reclassified to a manager position, with a salary increase of \$5000 per year. What steps need to be taken in HRMS?
7. An employee in your organization has resigned from her position, effective in two weeks. You would like to recruit for the position before she leaves. What actions do you need to take in HRMS?