

Exercises – Pooled Student Positions

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

Exercise 1: Position Views/Straight Updates

1a: Browse Pooled Positions/Position Details/Straight Updates

1. Click the **Search** tab.
2. Enter a valid Work-Study eligible student job code.
3. Click **Advanced Options**.
4. Deselect Active (only until 11/1/2009), and enter your unit code.
5. Click **Search**.
6. In the listing page, choose a position for this exercise.
7. Use Position ID _____.
8. Click the Position ID link.
9. View Position Details.
10. Note the Incumbent should say Pooled.
11. On position details page, under the section called General Information, click **edit**.
12. In Position Title field, enter Amazing Student Worker and **save**.
13. View success or error message on the straight update.
14. List at least three other straight updates possible on this page, and then update one of them.

1b: View Pooled Position Incumbent Listing Page

1. There are two ways to view the pooled incumbent listing page.
 - a. Under the section called Position Information, click **Pooled**.
 - b. Or, click the **Incumbent** tab.
2. View incumbent listing.
3. Note the number of incumbents. There are _____ incumbents in this pool.
4. Note there are unique assignment IDs for each incumbent.
5. Write down one of the assignment IDs. _____
6. How is the configuration of the assignment ID different from the position ID?

7. Click the column header **Name (EID)**.
8. View alphabetical listing of incumbent names.
9. Are the hours per week the same for all incumbents? _____
10. Is the hourly rate the same for all incumbents? _____
11. Is the Reports to Name the same for all incumbents? _____

1c: View Pooled Position Funding Page

1. Click the **Funding** tab.
2. View funding for the position.
3. Is it possible to modify funding on a straight update? _____

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Exercise 2: Modify Pooled Student Position (Work-Study eligible)

2a: Modify Pooled Student Position – Start page

1. Go to **Position>>Details**.
2. Enter the position ID you used in Exercise 1 and **Go**.
3. Click **Modify** at the top right of the Position Details page.
4. Check the Creator Desk information for accuracy. Change if needed by clicking the lookup tool.
5. Click **Walk me through**. The document is created.
6. Note the document navigation on the left side of the page.
7. What are the sections of the Modify document?

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

2b: Modify Pooled Student Position – General section

1. What position attributes can be changed on the General section?

2. Change Workdays to Tuesday through Saturday and enter a future Effective Date.
3. Click **Save**.
4. In the left navigation, is it possible to select the **Incumbent** or **Work-Study** sections? _____

2c: Modify Pooled Student Position – Funding section

1. Click **Funding** in the left navigation.
2. Click **edit**.
3. Put an end date of 12/31/2009 on existing funding and **save**. Note unfunded message.
4. Click **Add funding**.
5. Enter a valid salary account.
6. Enter a distribution of 100 and an effective date of 01/01/2010 with no end date.
7. Click **Save**.

2d: Modify Pooled Student Position - Document Review

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? _____
5. Click **Verify Document** in the gray routing section.
6. Correct any errors. HINT: Error messages contain links to the places in the document that have the errors. Click the error message link to go to that spot.
7. On Document Review, use the drop-down menu in the routing widget to select DEL - Delete this document. Click **Go**. Document is deleted and you can proceed with the next set of exercises.

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Exercise 3: Modify a pooled incumbent

Please note: The modifications included in this exercise are intended to demonstrate the actions that are possible when modifying a pooled incumbent. In the “real world” you would not likely have a separation and a pay adjustment on the same document.

3a: Modify a pooled incumbent

1. Go to **Position>>Details**.
2. Enter the position ID from Exercise 1 and **Go**.
3. Click either **Incumbent** tab or **Pooled** (link under Position Information) to go to the Incumbent listing page.
4. Click the EID of the first incumbent in the list to get to the individual incumbent page.
5. Click **Modify**.
6. Check the Creator Desk information for accuracy. Change if needed by clicking the lookup tool.
7. Click **Walk me through**.
8. The Modify document is created and the Incumbent section of the document is displayed.

a. Example 1: For **Separation**

- i. Enter a new end date for the incumbent.
- ii. What are the defaults for reason and reemployment recommendation?

b. Example 2: For **Pay Adjustment**

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

9. In the left navigation, click **Document Review**.
10. Click **Show** for each section to review all sections of the document.
11. Use the drop-down menu in the routing widget to select DEL - Delete this document. Click **Go**. Document is deleted and you can proceed with the next set of exercises.

Exercises – Pooled Student Positions

Exercise 4: Mass Assign Work-Study to Pooled Student Position

4a: Mass Assign Work-Study - Locate the pooled position

1. Go to **Position>>Details**.
2. Enter the position ID from Exercise 1 and **Go**.
3. Click **Incumbent** tab.
4. Under Reassign, select up to three incumbents you wish to reassign as Work-Study.
5. Click **Assign Work-Study**.

4b: Mass Assign Work-Study - Start page

1. Check Creator Desk for accuracy. Use the lookup tool to make changes if needed.
2. Under Default Attributes enter defaults for the assignment – Begin date, End date, Hours per Week.
Note: these are defaults for the assignment. Individual incumbents in the pool can be assigned their individual hours per week in the assign document.
3. Click **Create Assign Document**.

4c: Mass Assign Work-Study - General section

1. Enter different hours per week for all reassigned incumbents.
2. For all incumbents, enter a rate within the range.
3. Click **Add incumbents to pool**.
4. Note how to add incumbents to the pool.
5. Click **undo**.
6. Click **Save & Verify**.

4d: Mass Assign Work-Study - Miscellaneous section

1. Click **Miscellaneous** in left navigation,
2. Enter your EID in Reports to for the first incumbent.
3. Click **Save & Verify**.

4e: Mass Assign Work-Study - Work Study section

1. Use the lookup tool to locate the HAWS Job ID.
2. Enter departmental Work-Study contact EID(s).
3. Award limit will be filled in by Work-Study office.
4. Click **Save & Verify**.

4f: Mass Assign Work-Study - Employment of Close Relatives section

1. In the left navigation, click **Employment of Close Relatives**.
2. For one incumbent, enter: Mother is Tina Training in English Department in the text box.
3. Click **Save & Verify**.

4g: Mass Assign Work-Study - Remarks section

1. Enter Training exercise.
2. Click **Save & Verify**.

4h: Mass Assign Work-Study - Location section

1. In the left navigation, click **Location**.
2. Add TX as Work Location and Residency for new incumbent.
3. Click **Save & Verify**.

4i: Mass Assign Work-Study - Document Review

1. In the left navigation, click **Document Review** and review the assignments.
2. What is the Estimated Total Pay for These Assignments? _____
3. Click **Verify Document**.
4. Correct any errors.
5. Delete this document to continue with Exercise 5.

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Exercise 5: Mass Assign non Work-Study to Pooled Student Position

5a: Mass Assign non Work-Study - Locate the pooled position

1. Go to **Position>>Details**.
2. Enter the position ID from Exercise 1 and **Go**.
3. Click **Incumbent** tab.
4. Under Reassign, select up to three incumbents you wish to reassign.
5. Click **Assign**.

5b: Mass Assign non Work-Study - Start page

4. Check Creator Desk for accuracy. Use the lookup tool to make changes if needed.
5. Under Default Attributes enter defaults for the assignment - Begin Date, End Date, and Hours per Week 19.
Note: these are defaults for the assignment. Individual incumbents in the pool can be assigned their individual hours per week in the assign document.
6. Click **Create Assign Document**.

5c: Mass Assign non Work-Study - General section

7. Enter different hours per week for all reassigned incumbents.
8. For all incumbents, enter a rate within the range.
9. Click **Add incumbents to pool**.
10. Note how to add incumbents to the pool.
11. Click **undo**.
12. Click **Save & Verify**.

5d: Mass Assign non Work-Study - Miscellaneous section

1. Click **Miscellaneous** in left navigation,
2. Enter your EID in Reports to for the new incumbent.
3. Click **Save & Verify**.

5e: Mass Assign non Work-Study - Employment of Close Relatives section

1. In the left navigation, click **Employment of Close Relatives**.
2. For one incumbent, enter: Mother is Tina Training in Archaeology in the text box.
3. Click **Save & Verify**.

5f: Mass Assign Work-Study - Remarks section

1. Enter Training exercise.
2. Click **Save & Verify**.

5g: Mass Assign non Work-Study - Location section

4. In the left navigation, click **Location**.
5. Enter TX as Work Location and Residency for new incumbent.
6. Click **Save & Verify**.

5h: Mass Assign non Work-Study - Document Review

6. In the left navigation, click **Document Review**.
7. Review assignments.
8. What is the Estimated Total Pay for These Assignments? _____
9. Click **Verify Document**.
10. Correct any errors.
11. Use the drop-down menu in the routing widget to select DEL - Delete this document. Click **Go**. Document is deleted and you can proceed with the next set of exercises.

Exercises – Pooled Student Positions

Exercise 6: Create New Pooled Student Position

Note: Before creating any new position, search HRMS for existing positions that can be used.

6a: Create New Pooled Student Position – Start Page 1

1. Begin on the Home page.
2. Click **Create a New Position**.
3. Use the drop-down menu to select Position Category of Student.
4. Enter a valid student job code.
5. Click **Create by Job Code**.

6b: Create New Pooled Student Position – Start Page 2

1. Enter an origination date (use the first day of the month).
2. Check the Creator Desk for accuracy. Use the lookup tool to change if needed.
3. Click the checkbox to indicate that the position will be pooled.
4. Enter 19 for Hours per Week.
5. Select **Expected to Continue** for Duration.
6. Enter a valid unit code for Reports to Unit.

6c: Create New Pooled Student Position – General

1. Enter an assignment limit of 10. **Note:** This is informational only. No audits are in place for this field.
2. Under Location Information, enter information applicable to your unit.
3. Use the drop-down menu to select a Work Location.
4. Under Schedule
 - a. Select flexible and use the drop-down menu to select times.
 - b. Use the drop-down menu to select Workdays.
 - c. Recurring Cycle for students is by semester.
5. Under Reporting Structure, enter your position ID. Use the lookup tool if needed.
6. Under General Position Notes enter: This is a test position created during training.
7. Click **Save & Verify**. Correct any errors. Click **Save & Continue**.

6d: Create New Pooled Student Position – Salary and Funding

1. Select Hourly for Pay Type for the position.
2. Click **Add funding**.
3. Enter a valid salary account, distribution of 100, and Effective Date that matches the Origination Date, and no End Date.
4. Enter funding statement: <your name> approves this position.
5. Click **Save & Verify**. Correct any errors. Click **Save & Continue**.

6e: Create New Pooled Student Position – Purpose and Functions

1. Under Position Title (optional), enter Super Student Assistant.
2. Under Purpose, enter: The purpose of this position is to assist visitors.
3. Under Functions, select **Yes** for Driving Requirement.
4. Select that Driving is an essential function.
5. Click **Save & Verify**. Correct any errors. Click **Save & Continue**.

6f: Create New Pooled Student Position – Document Review

1. Click **Show** for each section to review all sections of the document.
2. Click **Verify Document**.
3. Correct any errors.

Exercises – Pooled Student Positions

Optional Scenarios

1. You need to add a Position (working) Title to a student position. Where would you do this?
2. You have an existing pooled student assistant position. You would like to reassign 5 of the students for next semester. What steps would you need to take to accomplish this?
3. Your department needs to create a pooled position for student assistant instructors. The pool will have 15 Teaching Assistants assigned to the position. How would you accomplish this task?
4. Your department has a pooled student associate position. All 10 incumbents in the pool report to the same position ID except one. The one reports to you. How would you make this change in HRMS?
5. A student in a pooled position has been fired for not coming to work. What steps would you take in HRMS to accomplish this separation?
6. You have a pooled student position with 5 incumbents. You want to reassign all of them for the next semester, but one of them will be a Work-Study. How will you accomplish this in HRMS?