

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

Fall 2009

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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.

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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

Position/incumbent/funding relationship



Assignment begins



Funding



- Account(s)
- Distribution
- Begin/end dates

When the assignment begins, the incumbent inherits the attributes of the position and is paid from the funding source(s).

Position/incumbent/funding relationship



Assignment ends



When the incumbent leaves, the position stays on the org chart, is vacant, and retains its attributes and funding source(s).

Funding



Account(s)
Distribution
Begin/end dates

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

General FAQ

- **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

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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

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Questions?

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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

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Navigation review & Phase 2 update

A link to your
DEFINE inbox



Tools
Online Help
HRMS roles
Rate calculators

Reports

Other HR
resources

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Navigation review & Phase 2 update

The screenshot shows the 'Edit Tabs' interface in the HRMS system. At the top, there are navigation links: 'MAP | UTDIRECT HELP | LOGOFF'. Below this is a header bar with 'Edit Tabs'. To the right of the header are links for 'print | help | bookmark'. The main area contains a search form with a dropdown menu currently displaying 'Position ID'. To the right of the dropdown is a 'Search' button. Below the search form, there are two buttons: 'List Templates' and 'Create a new position'. An arrow points from the text 'Search by any of these criteria' to the 'List Templates' button.

MAP | UTDIRECT HELP | LOGOFF

Edit Tabs

print | help | bookmark

Position ID

Search

Position ID
Name
UT EID
Job Code
Unit Code
Reports to UT EID
Document ID
Posting ID

List Templates | Create a new position

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.

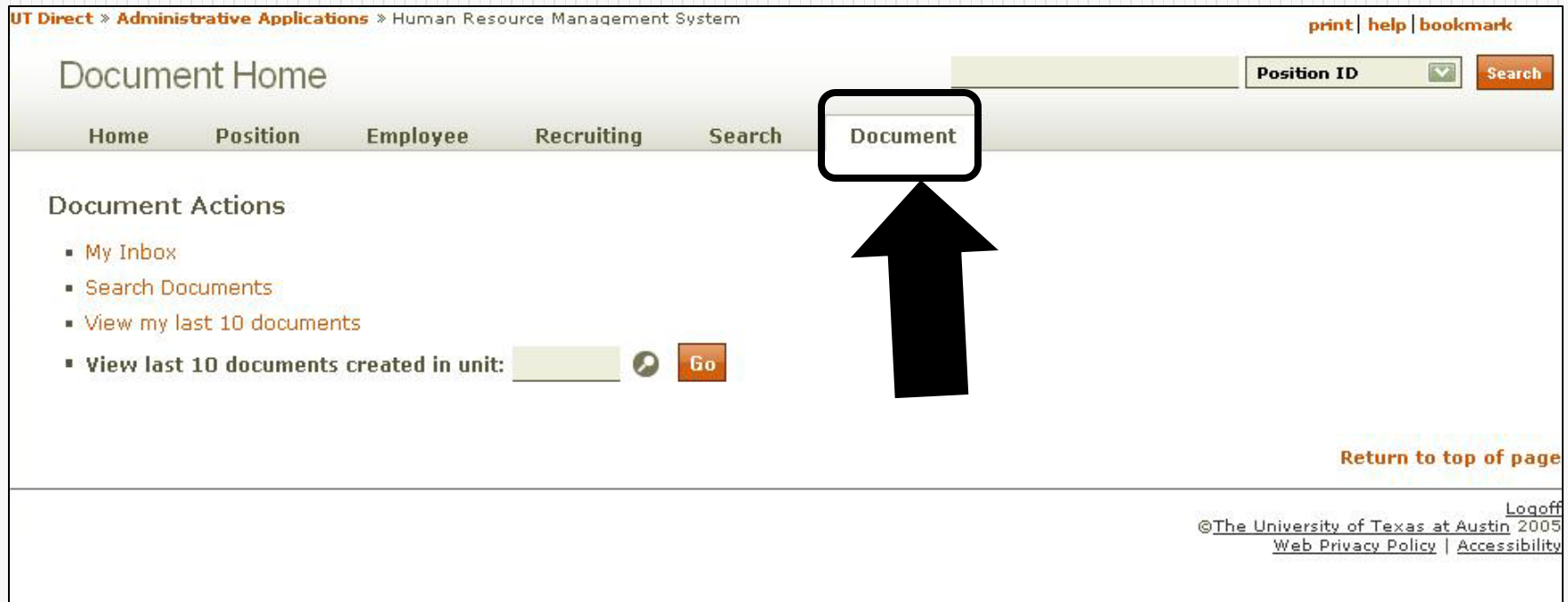
You can:

- **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**

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Navigation review & Phase 2 update



The screenshot shows the 'Document Home' page of the HRMS. At the top, there is a breadcrumb trail: 'UT Direct > Administrative Applications > Human Resource Management System'. To the right of the breadcrumb are links for 'print | help | bookmark'. Below the breadcrumb is a search bar with a 'Position ID' dropdown and a 'Search' button. A navigation menu contains tabs for 'Home', 'Position', 'Employee', 'Recruiting', 'Search', and 'Document'. The 'Document' tab is highlighted with a black box and a large black arrow pointing to it. Below the navigation menu is a 'Document Actions' section with a list of links: 'My Inbox', 'Search Documents', 'View my last 10 documents', and 'View last 10 documents created in unit:'. The last link has a text input field, a person icon, and a 'Go' button. At the bottom right of the page, there is a 'Return to top of page' link and a footer containing 'Logoff', '©The University of Texas at Austin 2005', 'Web Privacy Policy', and 'Accessibility'.

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

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