

Human Capital Management (HCM): Step-by-Step Guide

Updating a Position

This guide describes how to update a position in HCM. If you want to update funding, make any position updates first and then you will need to make a funding entry as a separate process. For information about updating funding for a position, refer to *Making a Funding Entry Step-by-Step Guide*.

After a position is updated, HCM automates the workflow process to ensure the necessary approvals are obtained. Informational messages may appear, allowing you to make corrections before data is committed to the HCM tables.

After a position update is approved, the data for the position is written to HCM.

While non-person profiles (NPPs) are associated with a position, they are managed separately. For more information about updating NPPs, refer to *Creating or Updating a Non-Person Profile (NPP) Step-by-Step Guide*.

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Before You Begin

Before you begin, you should have the following information:

- Position number.
- The effective date of your change. The effective date can be current, future or past as long as it does not have a date prior to the incumbent's current row in Job Data. If the effective date used coincides with a previous pay period, determine whether any payroll adjustments must be made. Those adjustments must be made as a separate process.
- Information specific to the position you are updating: Business Unit, Job Code, Regular or Temporary, Full-Time or Part-Time, and Department. If you are updating the Department code, the system will display the CU Funding Entry page from which you can update the SpeedType and Percent of Distribution.
- Positions have a default Title associated with the Job Code. If you are updating the Title to a different working title, you should know what it will be.
- If you are changing the department, new funding must be entered. You will need:
 - The active SpeedType of the fund (or funds) being used for this position.
 - Distribution of the funding (amount or percentage). For example, your department may want to allocate a fixed amount to a SpeedType, and the remaining amount to another SpeedType. You can specify a fixed amount and then the percentage will calculate accordingly. The total allocation across SpeedTypes must always equal 100%.

Navigation tips:

▼ HCM Community Users

Procedures in this guide begin from the HCM Community Users dashboard:

1. From the portal, click the **HCM** tile. The Employee Self Service dashboard appears.
2. Click **Employee Self Service**.
3. Click **HCM Community Users** to display the dashboard.



The NavBar displays options for accessing other systems. Through the NavBar, you can select CU Resources to access systems on the portal.




The looking glass is called a look up and displays search results for you to select valid field values.



The book and checkmark lets you spell check text boxes.



The down arrow lets you hide, or collapse, sections you do not want to view.

Click the  arrow to expand the section.

Updating a Position

To update a position:

1. From the HCM Community Users dashboard, click the **Non-Pay Actions** tile.
2. From the menu on the left, select **Position Management > Add/Update Position Info**.

The Add/Update Position Info page appears:

3. From the **Find an Existing Value** tab, enter search criteria for the position. Department and Job Code are most helpful.
4. Click **Search**.

The Position page appears at the Description tab.

5. Click the plus button **+** to add a row.
6. In the **Effective Date** box (located in the Position Information section), type or select an effective date.

7. From the **Reason** box, select the correct reason for the update. This field is required.
8. Update the fields necessary.

Note: The following actions may occur when you save or submit your update:

- If you change the Department, the CU Funding Entry page will appear for you to update funding related to this position. The related approval workflow will also be applied.
- If you change Business Unit or Job Code, an approval workflow will be applied.
- If you are updating a position for hire, make sure there is a reports to. If the reports to field is blank, the system displays an error during the hire process, and you will have to update the position before submitting the hire transaction.

9. Click the **Specific Information** tab.

10. Pass changes through to an incumbent. The Incumbents box lets you choose options for updating job data associated with the employee currently in the position.
 - a. If you don't want your updates to apply to the person currently holding the position, deselect, or clear, the **Update Incumbents** box. However, if you want to update the position and the incumbent in this position, make sure the Update Incumbents box is selected so the system will update both the Position and Job Data with this information.
 - b. Select **Include Salary Plan/Grade** to include your Salary Plan changes on the incumbent's Job Data. This option is only available when Update Incumbents is also selected.
 - c. If you are updating the working title, which otherwise defaults from the job code, you can select **Force Update for Title Changes**, to update the title for the incumbent in Job Data.
11. Under Education and Government, select the appropriate **Classified Indicator**.
12. Click the **CU Position Data** tab.

- If changing the Campus Box, enter the **Campus Box** that is appropriate for the selected Department. Click the look up to search for the Department ID by entering the number into the Department ID field.

Look Up Campus Box

Campus Box:

Description:

Department ID:

Department Description:

Location Code:

Location Description:

[Basic Lookup](#)

Search Results

View 100 First 1-2 of 2 Last

Campus Box	Description	Department ID	Department Description	Location Code	Location Description
003 UCA	Board of Regents	50001	Board of Regents	5UCA	Office of the President

- Click **Save**. If you changed the Department, the CU Funding Entry page will appear.
- In the **New Distribution Data** section, enter the **SpeedType** and **Percent of Distribution**. Refer to *Making a Funding Entry Step-by-Step Guide* for more information about funding.
- Click **Save/Submit** from the CU Funding Earnings tab. HCM saves the funding entry and returns you to the Position Information page. If you changed the Business Unit or Job Code, the appropriate approval workflow will appear.

Note the new position number and the HRGL Request number on this page. Use this HRGL Request number to confirm that the funding entry status has changed to Completed once the position has been approved. Also, confirm the funding posted in Position Funding History.


Updating Denied Position Changes

If your updates are denied, you will receive an email notification indicating why they were denied.

1. From the HCM Community Users dashboard, click the **Non-Pay Actions** tile.
2. From the menu on the left, select **Position Management > Add/Update Position Info**.
3. From the **Find an Existing Value** tab, enter search criteria for the position.
4. Click **Search**.

The Position page appears at the Description tab showing the Position Status as Denied.

The screenshot shows the 'Position Information' tab in the HCM system. The 'Position Number' is 00703479. The 'Headcount Status' is 'Filled' and the 'Current Head Count' is 1 out of 1. The '*Effective Date' is 07/01/2017. The '*Status' is 'Active'. The 'Reason' is 'OTH'. The 'Position Status' is highlighted in yellow as 'Denied'. The 'Status Date' is 02/04/2013. The 'Action Date' is 07/14/2017. There is a search icon next to the Reason field and a 'Key Position' checkbox.

5. Click the plus button  to add a row.
6. In the **Effective Date** box (located in the Position Information section), type or select a date that is one day greater than the existing effective date. The Position Status changes to Proposed.
7. From the **Reason** box, select the reason for the update.
8. Make the necessary corrections and click **Save**.

When a position row with a department change is denied, funding from the original position HRGL Request will not post. When adding the post denial row, a new CU Funding Entry page will not launch (because the department already changed in the former row). In order to create funding for this position, a separate CU Funding Entry must be completed with the same effective date as the revised row. Refer to *Making a Funding Entry Step-by-Step Guide* for more information about funding.

9. From the CU Position Data tab, click **Submit**. The position now has a status of Submitted and will go through the approval process again.

Results of Approval

After the request has a status of Submitted, it will go through the approval process. Once the updates are approved:

- Data changes are written to the HCM tables.
- The status of the request is updated to Approved.
- The funding entered in the HRGL Request with the same effective date as the approved position row (for a NEW or Department Change row) will post to create new funding.

If necessary, you can edit the Non-Person Profile (NPP). Refer to *Creating or Updating a Non-Person Profile (NPP) Step-by-Step Guide* for more information.