HRMS Basics

human resource management system
Overview/Class Objectives

• Part 1: Presentation
  • What is HRMS?
  • HRMS concepts and terms
  • Position/Incumbent/Funding relationship
  • Highlights from Phase 1
  • What’s coming with Phase 2
  • General FAQ
Overview/Class Objectives

• Part 2: Hands-on
  • System navigation
  • Help
  • Searching for positions
  • Straight updates to positions and incumbents
What is HRMS?

• Historically, actions in the DEFINE appointment-based system have been driven primarily by account number.

• In a position-based system, the position represents the organizational home of the incumbent/employee.
What is HRMS?

Organizational hierarchy

University of Texas at Austin

- Unit A
  - Position
  - Position
- Unit B
  - Position
  - Position

HRMS
What is HRMS?

- The Human Resource Management System (HRMS) is a Web-based integrated solution to human resource, employee, and payroll services.

- Development is spearheaded by the university’s business services council.

- Departments across campus provided collaborative efforts to develop the system.
# What is HRMS?

- **Phased approach**
  - **Phase 1 went live November 3, 2008**
    - A&P/Classified/Teacher/Librarian positions
    - Replaced RPM system
  - **Phase 2 launched November 2, 2009**
    - Faculty & student positions
    - Assignments that create appointments
    - Incumbent
    - Funding
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*
  
  - Incumbent describes the relationship an individual has to a *position*.
  
  - 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 & affects payroll/getting people paid
    • Based on fiscal year and account
  • Assignment
    • Larger description of an incumbent’s relationship to their position
    • Includes 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 (non-faculty only), is vacant, and retains its attributes and funding source(s).

The position can then be filled by another incumbent.
Highlights from Phase 1

• Created a foundation for positions and the concept of position management

• A&P/Classified/Teacher/Librarian positions

• Replaced the RPM system for recruiting

• Made reporting structure clearer with direct reports to capability

• Supervisors can view a list of their direct reports

• More open security model, allowing more access to data
Highlights from Phase 1

- Benefits of having position data
  - Identify positions as unique entities within the workforce, each with a specific set of attributes
- Establish a structure of reporting relationships
- Capture and report on position-related information
  - Analyze the growth or decline of positions within specific workforce sectors
  - Evaluate modifications to positions over time
- Retain position attributes
- Modify positions as needed
New Features in Phase 2

- Phase 2 of HRMS launched November 2\textsuperscript{nd}.
  - Funding
  - Incumbent
  - Appointment creation from HRMS via assignments
  - Faculty and student positions
  - New type of position – Affiliated Worker
  - Pooling (new) of student and affiliated worker positions
General FAQ

• 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
  • The command is embedded in the document ID

• Will I have to create all my positions?
  • No! Data converted at go-live
HRMS Resources

- **HRMS**
  
  https://utdirect.utexas.edy/hrms/home.WBX

- **HRMS Help**
  
  http://www.utexas.edu/ecs/hrmshelp/index.php

- **askUs knowledge database**
  
  https://austin-utexas.custhelp.com

- **HRS Representative**
  
  http://www.utexas.edu/hr/hrpro/lookup/

- **HRMS Support**
  
  https://www.utexas.edu/business/erp/hrms/restricted/submit_austin.html
HRMS Training

- HRMS Training Site
  http://www.utexas.edu/business/erp/hrms/training.html

- Training Videos
  http://www.utexas.edu/business/erp/hrms/P1Training.html

  Affiliated Worker:
  https://www.utexas.edu/business/erp/restricted/hrms_training/hrms_create_aw/aw_create.htm

- HRMS Training Classes (TXCLASS)
  - Basics – PN750
  - Faculty – PN751
  - Student – PN752
  - A&P/Classified/Librarian/Elementary School Teacher – PN754
Questions?
Hands-On Training in QUAL

- Test environment is called QUAL
  - Data is real but not live
  - Work in QUAL does NOT affect data in production

- Firefox is the recommended browser

https://qual.its.utexas.edu/hrms