HRMS Modifying Positions & Assigning Incumbents
Overview/Class Objectives

• Part 1:
  • HRMS concepts and terms
  • Position/incumbent/funding relationship
  • Key features
  • General FAQ
Overview/Class Objectives

- Part 2: Hands-on HRMS
  - Views/straight updates
  - Modify A&P/Classified positions
  - Reclassify a filled position
  - Assign to non benefits eligible position - demo
  - Recruiting Summary Hire page - demo
# Key Features of HRMS

- Straight updates to positions and incumbents
- Management of position funding
- Employee assignment listing on Employee History
- Action links and documents to modify positions, incumbents, and funding
- Recruiting Summary generates assignments automatically.
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
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.
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, is vacant, and retains its attributes and funding source(s).

The position can then be filled by another incumbent.
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.edu/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](http://www.utexas.edu/business/erp/hrms/training.html)

- Training Videos
  [http://www.utexas.edu/business/erp/hrms/P1Training.html](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](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
  - Modifying/Assigning to Positions – 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