Overview

- This job aid is intended for the HCM Initiator.

- This is a two-step process:
  1. Change the title on the Position (title associated with position #) in Workforce Structures
  2. Process the change in the person’s Assignment.

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1. Find the position number.

If you don’t know the TTT faculty’s position number, you can look it up under Person Management.

1. Search for the person in the Person Management search box, then navigate to the Employment page.
2. In the Job Details section, click on the orange dots next to the Position field …. (you will see them when you hover over that area)

... and you’ll see a pop-up like this:

3. Make note of the position number under the title, and click on Done in the upper right corner.

NOTE: If you know it already, your first step is to update the title of the Position itself.

2. Navigate to Workforce Structures

1. You can navigate to Workforce Structures two different ways:
   
a. (Option 1) From the iO Home Page, select the My Client Groups tab.
In the Apps directory, select **Workforce Structures**.

b. (Option 2) Click on the **Navigator** on the top left of the home screen.

Select **Workforce Structures** from **My Client Groups**.

3. **Update the Position**
   1. From the Workforce Structures page, navigate to Manage Positions from the Workforce Structures menu.
      a. Select **Manage Positions** from the Workforce Structures menu.
b. Click on Manage Positions.

2. Search on the position number in the **Code** field.

   ![Manage Positions](image)

   Then select the appropriate position so that the line turns blue.

3. Pull up the drop-down box next to **Edit**:

   ![Drop-down box](image)

   … and select **Update**.

4. In the **Update Position** dialog box, enter the **effective date** of the change and the **Action Reason**: **Promotion**. Hit OK.

   ![Update Position](image)
5. In **Position Description** section: Update the **Name** field. This is the name of the position, usually the same as the rank. (There’s another field to put a more specific job title, like an endowed chair, on the assignment in another action you’ll do next.)

![Position Description](image)

6. To update the **Job** field (which is the faculty classification), search for the new **rank** and select it from the results.

![Job](image)

7. Scroll down to the **Valid Grades** section, and **Remove** the old grade/rank:

![Valid Grades](image)

8. Now **Add** the new **Grade**.
   a. Click the down arrow to see the choices of a new grade/rank.

![Grade Choices](image)
b. If you don’t see the right rank in the list, click the More link. You may have to scroll down in the window to see it.

c. In this search box, search for “Faculty –”, and this will bring up all the faculty grades.

d. Select the new rank and hit OK.


10. Review the changes; then Submit.

a. Click Yes on the confirmation page.

*Please note: Workflow will be triggered for this transaction. You will need to wait until this action has been approved before you can proceed to the next part of this promotion.*
4. Update the Assignment

1. After the **Position Update** has been approved, you will process the promotion by **updating** the person’s **Assignment**.

2. **Search for the Person:**
   a. You can access **Person Management** in two ways:
      i. (Option 1) Click the Navigator icon in the upper left-hand corner of the iO page.

   ![Image of Person Management section in iO page]
   - Under the **My Client Groups** section click the drop-down arrow and select **Person Management** from the drop-down list.
ii. (Option 2) Under the **My Client Groups** tab on the home page, you can scroll down and click on the **Person Management** tile on the Main Page.

b. In the **Name** field, type the person’s name. Select the **Search** button.

c. Select the appropriate person in the Search Results section. When you have selected a certain line, it turns **blue**. If they have multiple lines (assignments or roles), select the one that should be ended.
3. On the Employment tab, select the **Edit** drop down box, in the Assignment section.

4. Select **Update** button.

5. **Effective Start Date**: Type out date or use calendar to select the update date.
6. **Action**: **Promotion**.

3. **Action Reason**: **Promotion**. *(It is generally unnecessary to select Promotion with Pay Change, because their new fiscal year pay has already been submitted via the budget load process.)*
4. Notice that the Position is already updated, but Job (classification) is still the old rank. If the Position is not showing the new rank, please make sure that you've done the first part of this job aid of updating the Position, and that the position updates have been approved by all approvers.

5. Change “Synchronize from Position” from No to Yes. Respond Yes to the warning.

6. Now note that Job and Grade (rank) have changed to the new rank.

7. Change the Assignment Name to match the promotion title.

8. In the right hand column, update the Tenure Status, Tenure Date, and Faculty Rank Effective Date as necessary.
9. Click on Review to review the changes entered. (To come back to this action later without submitting, click Save or Save and Close.)

10. To make any changes, click the Back button to return to data entry page.
11. Upon completion of the data review, click on Submit.

9. In the warning popup, click Yes.

10. The action will now go through the approvals process.