PeopleSoft 8.3 Human Resources PeopleBook: Manage Positions

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PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

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About the HRMS PeopleBooks

The HRMS PeopleBooks provide you with the information you will need for implementing and using PeopleSoft Human Resources Management System (HRMS) products.

This section describes information you should know before you begin working with PeopleSoft products and documentation, including PeopleSoft-specific documentation conventions, information specific to the PeopleSoft HRMS product line, how to order additional copies of our documentation, and so on.

Before You Begin

To benefit fully from the information covered in these books, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating around the system and adding, updating, and deleting information using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft® Windows or Windows NT graphical user interface.

Because we assume you already know how to navigate the PeopleSoft system, much of the information in these books is not procedural. That is, it does not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. These books expand on the material covered in PeopleSoft training classes.

PeopleSoft Application Fundamentals for HRMS PeopleBook

The individual HRMS PeopleBooks provide you with implementation and processing information for the individual HRMS products. However, there is additional, essential information describing the setup and design of each HRMS product contained in the companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook.*

The *PeopleSoft Application Fundamentals for HRMS PeopleBook* consists of important topics that apply to many or all PeopleSoft applications across the HRMS product line. Whether you are implementing a single HRMS product, some combination of products within the product line, or the entire PeopleSoft HRMS system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals such as setting up control tables and administering security.

In the *PeopleSoft Applications Fundamentals for HRMS PeopleBook*, we've included common information pertinent to all applications in the HRMS product line, such as defining general options. If you're upgrading from a previous PeopleSoft release, you may notice that we've removed some topics or topic headings from the individual application PeopleBooks and consolidated them in this single reference book. You'll now find only application-specific information in your individual application PeopleBooks. This makes the documentation as a whole less redundant. Throughout each PeopleBook, we provide cross-references to *PeopleSoft Application Fundamentals for HRMS* and other PeopleBooks.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (www4.peoplesoft.com/cc). We post updates, troubleshooting documentation, and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection Web site: http://www4.peoplesoft.com/cc

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM *PeopleSoft 8.3 HRMS PeopleBooks,* SKU HR83PBR0, and *PeopleTools 8.14 PeopleBooks,* SKU PTB814R0.

Note. Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press Web site from the Documentation section of PeopleSoft Customer Connection. The PeopleSoft Press Web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

Internet

From the main PeopleSoft Internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order.

PeopleSoft Internet site: http://www.peoplesoft.com.

Telephone

Contact Consolidated Publishing Incorporated (CPI) at **800 888 3559.**

Email

Email CPI at **callcenter@conpub.com**.

PeopleBooks Standard Page Element Definitions

Throughout our product documentation, you will encounter fields that are used on many application pages or panels. This section lists the most common fields and provides standard definitions.

Field	***Definition***
Address 1, Address 2, Address 3	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
As of Date	The last date for which a report or process includes data.
Block (Bloque)	In Spanish addresses, a building or buildings that are close together may be called a Block (Bloque). Include the Block name in the address, if necessary.
Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
City	Name of city for address.
Comment(s)	Freeflow text entry that enables you to add comments.
Company	A business organization. For US companies using PeopleSoft Payroll for North America or PeopleSoft Pension Administration, a business unit that has a unique federal Employer Identification Number (EIN) for payroll reporting purposes.

Field	***Definition***
Country	Country for address. Other address fields will be adjusted to reflect Country choice. Select a country from the list of valid values and press TAB to move through the field. The system automatically displays the appropriate address fields using the standardized address formats previously set up in the Country Table. Enter the appropriate address data in the fields that appear.
County (also **Prefecture** and **Parish**)	Name of county (prefecture/parish) for address, if applicable.
Currency Code	The 3-letter code in which the currency is specified.
Description	Freeflow text up to 36 characters that describes what you are defining.
Department	An identification code that represents an organization in a company.
Door (Puerta)	In Spanish addresses, identifies the door name or number.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Email	The email address for a person or organization.
EmplID (employee ID)	Unique identification code for an individual associated with your organization.
Empl Rcd# (Employee Record Number)	A system-assigned number that indicate an employee has more than one record in the system.
Fax (also **Fax Number)**	The fax number for a person or organization.
Floor (Piso)	In Spanish addresses, identifies the floor name or number.
House	Identifies the type of house.
Initials	Initials of individual.
Language	Language spoken by employee/applicant/non-employee.
Language or Language Code	The language in which you want the field labels and report headings of your reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.
Last Run On	The date that a report or process was last run.
Locality	A tax location within an organization.
Name	Name of individual.

Field	***Definition***
National ID	Identification code used by countries to track information on their residents for payroll, identification, benefits, and other purposes. For example, for US residents this would be their Social Security Number; for German residents it would be their Social Insurance Number, and for UK residents it would be their National Insurance Code.
Number	The number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.
Phone	The phone number for a person or organization.
Phone Extension	The phone extension number for a person or organization.
Phone Type	Identifies the type of phone number entered in the Telephone field. Valid values are ***Business, Campus, Cellular, Dormitory, FAX, Home, Other, Pager 1, Pager 2,*** or ***Telex.***
Post Code (also Postal)	Postal code for address.
Prefix	Prefix for individual (such as Mr., Ms., Mrs., Dr., and so on)
Process Frequency group box	Designates the appropriate frequency in the **Process Frequency** group box: **Once** executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to **Don't Run**. **Always** executes the request every time the batch process runs. **Don't Run** ignores the request when the batch process runs.
Process Monitor	This button takes you to the Process List page, where you can view the status of submitted process requests.
Regulatory Region	A regulatory region can be any region where there are specific laws and regulations that are addressed by functionality in PeopleSoft Human Resources. Many country-specific transactions are driven by regulatory requirements where Regulatory Region is used for transaction processing.
Report ID	Identifies a report.
Report Manager	This button takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	A request identification that represents a set of selection criteria for a report or process.
Run	This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.

Field	***Definition***
Run Control ID	Identifies specific run control settings for a panel.
Run Date	The date that a process was run or a report was generated.
Run Time	The time that a process was run or a report was generated.
SetID	An identification code that represents a set of control table information. SetIds enable the sharing of a set of control table information across two or more Business Units.
Short Description	Freeflow text up to 15 characters.
Stair (Escalera)	In Spanish addresses, identifies the stair name or number.
State (also **Province)**	State (Province) for address.
Status	Indicates whether a row in a table is ***Active*** or ***Inactive.***
Street Type	Identifies whether an address is a place, street, avenue, road, or so on. Spanish law requires addresses in official documents to include the Street Type.
Telephone (Phone)	The telephone number for a person or organization.
User ID	The system identifier for the individual who generates a transaction.

See Also

PeopleTools Development Tools: Application Designer PeopleBook, "Creating Field Definitions," Understanding Effective Dates

PeopleSoft Process Scheduler

PeopleBook Standard Group Boxes

The following group boxes and field groupings appear throughout PeopleSoft HRMS. We have documented them once here.

Entering Name Information

The following fields appear wherever you enter or display naming information:

Format Using — Select the country with name format appropriate for this employee. The system will display the appropriate fields for this format in the Person Name group box.

Refresh the Name Field — Click to refresh the Name field after you've edited any of the name fields. The system will refresh the name field when you save.

Person Name or Current Name

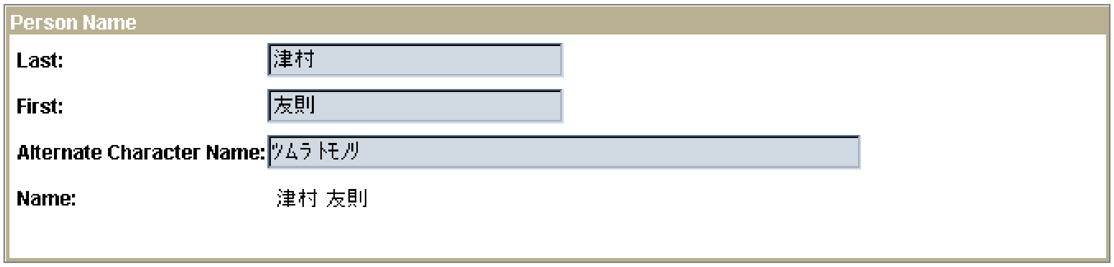
The following fields appear in the Person Name group box. You will not see all of the fields listed below at any one time. The system displays the fields necessary for the country you select in the Format Using field.

Title	Select a title. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.
Prefix and **Name Prefix**	Select a Prefix or Name Prefix, if applicable.
Royal Prefix	Select a Royal Prefix, if applicable.
First Name	Enter the employee's official first name.
Preferred First Name	For The Netherlands, enter the employee's preferred first name, if different from the First Name. The system will use the preferred name when you generate form letters or mailing labels for this employee.
Last Name Preference	For the Netherlands, choose this link to provide additional name information for married employees. The Last Name Preference page contains three fields: Last Name Partner, Prefix Partner and Last Name Preference.
Middle	Enter the employee's middle name, if applicable.
Last Name	Enter the employee's official last name.
Suffix	Select a suffix, if applicable.
Second Last Name	For Spanish employees, enter the second surname (mother's surname).
Alternate Character Name	Use this field to enter the employee's name using alternate characters (such as Japanese phonetic characters). **Note.** You can enter names using Japanese characters with or without a space between the surname and given name. Names using Roman alphanumeric characters require a comma delimiter. **Warning!** Be sure to select the correct character set on the Installation Table – Alternate Characters page. Using the wrong character set generates an error message.
Royal Suffix	Select the appropriate royal suffix. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.
Name	The system displays the employee's name as it will appear in the system.

Displaying Japanese Names on Pages

Pages that display personal name fields usually display them in First Name, Last Name order. When the country is Japan, however (JPN in the Format Using field), those fields appear in the Last Name, First Name order.

Another difference is that the Name field displays “Last Name[space]First Name,” not “Last Name,First Name”; that is, a space separates the last and first names, not a comma.



Japanese name format on a page

See Also

PeopleSoft Applications Fundamentals for HRMS PeopleBook, “Setting Up PeopleSoft HRMS,” Working With Double-Byte Characters

Entering Address Information

The following fields appear in address group boxes throughout PeopleSoft HRMS. You may not see all of the fields listed below as the system displays only the fields necessary for the country in use. Determine which address fields are required for each country on the Country Table – Address Format page.

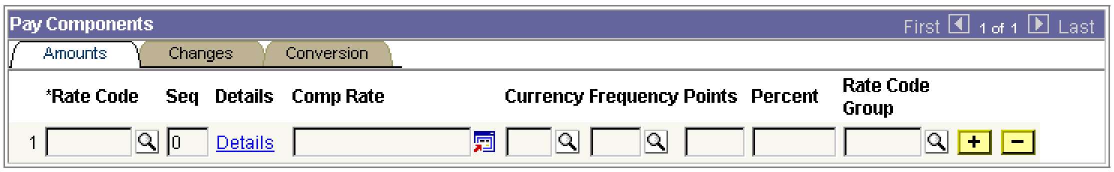
Country	Select the country with address format appropriate for this address. The system will display the appropriate fields for this format in the address group box.
Address 1, **Address 2**, **Address 3**, and **Address 4**	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
City	Enter the city.
County	Enter the county, if applicable.
State (State, Province, or other)	Enter the state or province.
Postal	Enter the postal, such as zip or postal code.
Number 1, and **Number 2**	Enter the number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.

House Type — Enter the house type, if applicable.

Postal Search — Click **Postal Search** to use international address formats.

Entering or Viewing Pay Components

Amounts Tab



Pay Components - Amounts

Rate Code — Rate codes are IDs for pay components. The system inserts any compensation information associated with this rate code in the compensation grid.

Note. If a seniority rate code is inserted as a default value on the Job Data - Compensation page, the values for these rate codes are unavailable for entry.

Seq (sequence) — The sequence number of the rate code if it is used more than once.

Details — Click the **Details** button to open the Comp Rate Code Secondary Panel page.

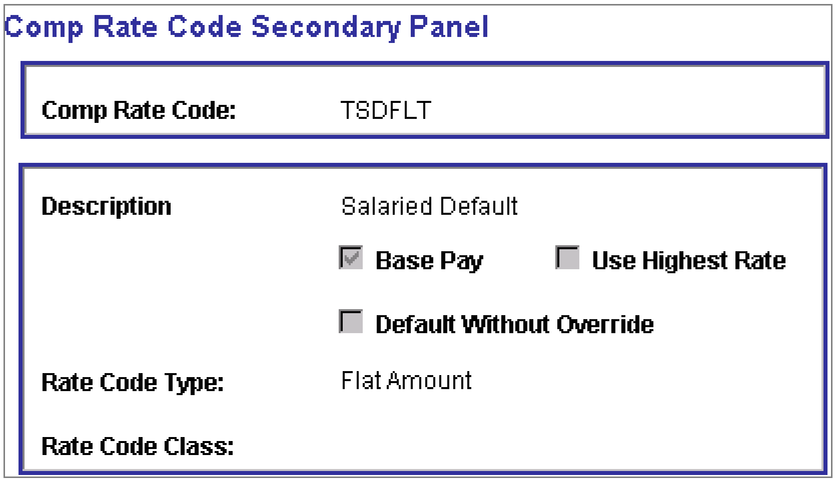
Comp Rate, (compensation rate) **Currency**, and **Frequency** — The compensation rate, its currency, and the frequency (for example, annually, weekly, or hourly) the comp rate will be paid.

Apply FTE — If selected, the system multiplies the rate code value by the FTE factor for annualization and deannualization. FTE is the percent of full time the employee should normally work in the corresponding job. This field isn't available for ***Percent*** rate codes.

Points — The salary points associated with this rate code, if any.

Percent — If the rate code rate type is ***Percent,*** the system displays the percent to be applied to the job compensation rate or to a rate code group if you are using rate code groups.

Rate Code Group — A rate code group enables you to be more specific when calculating percentages based components as part of your employee compensation package.



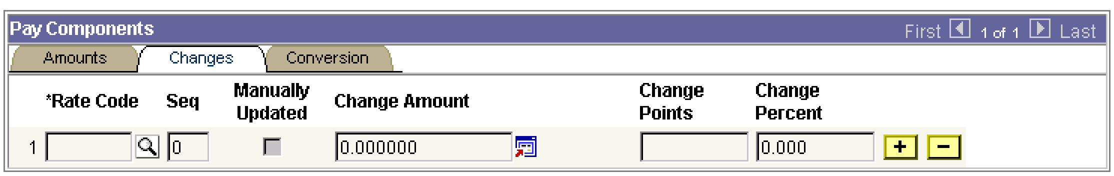
Comp Rate Code Secondary Panel

Access this page by clicking the Details link on the Amounts page. Displays additional information about the rate code.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Multiple Components of Pay," **Defining Rate Codes**

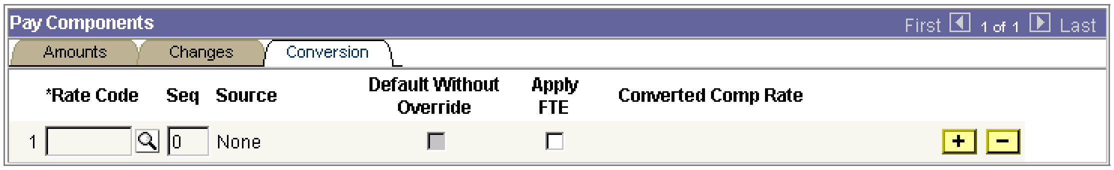
Changes Tab



Pay Components – Changes page

This page displays the change in an employee's salary.

Manually Updated	The system selects this if you have manually updated the pay components.
Change Amount	The overall change amount to this pay component rate.
Change Points	The overall change amount (in points) to this pay component, if applicable.
Change Percent	The overall percentage change to this pay component, if applicable.



Pay Components – Conversion

This page displays the conversion rates in an employee's salary.

Source — The system displays the source of the rate code, such as ***Absorbing Premium***, ***Seniority Pay***, ***Job Code***, or ***Manual***.

Default Without Override — Selected if the worker's compensation package cannot be manually updated on the Job Data – Compensation page.

Apply FTE — Indicates if the converted rate code value will be multiplied by the FTE factor for annualization and deannualization.

Converted Comp Rate — Displays the converted compensation rate for this pay component. The system converts all base pay components to the Job currency and compensation frequency.

Required Fields on Pages

When you see a field on a page with an asterisk (*) preceding the field name, it means the field is required. You can not save a page without entering data into all of the required fields on a page.

Example of a required field label

In some unique instances a field may be required even though there is no asterisk preceding the field name. In such cases, you will be prompted to enter data in these fields before saving the page.

Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

`monospace font`	Indicates PeopleCode.

Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold). We also use boldface when we refer to navigational paths, menu names, or process actions (such as **Save** and **Run**).
Italics	Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears we use this style: ***field value.*** We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number *0*, not the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
See Also	PeopleBooks provide cross-references under the heading "See Also." Capitalized titles in italics indicate the title of a PeopleBook; titles in quotes indicate the title of a chapter; titles in normal font refer to sections within the PeopleBook. Here's an example: ***See Also*** *About These HRMS PeopleBooks,* **PeopleSoft 8.3 HRMS PeopleBooks Preface**

Note. Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!,** the note is crucial and includes information that concerns what you need to do for the system to function properly.

Warning! Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Process Introductory Table

In the documentation, each business process in the application is accompanied by an introductory table with pertinent information about the pages used in the process.

Page	***System Name***	***Navigation***	***Usage***
Name of the page.	Gives the system name of the page as specified in the PeopleTools Application Designer. For example, the system name of the Detail Calendar panel is DETAIL_CALENDAR1.	Provides the path for accessing the page.	Describes how you would use the page.

USF U.S. Federal Government Functionality

Any functionality that is specific to the U.S. Federal Government sector will be designated by a USF marker. Most often this will appear at the beginning of a section heading (such as with this section), but the USF designation might also appear in a note or within text, if appropriate.

E&G Education and Government Functionality

Any functionality that is specific to the Education and Government sector will be designated by an E&G marker. Most often this will appear at the beginning of a section heading (such as with this section), but the E&G designation might also appear in a note or within text, if appropriate.

Local Country Functionality

Any functionality that is specific to an individual country will be designated by the three-character ISO code for that country. For example, functionality specific to Germany would be indicated by a DEU designation at the beginning of a section heading. Most often this will appear at the beginning of a section heading (such as with this section), but the country designation might also appear in a Note or within text, if appropriate.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed about our documentation, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft HRMS Product Documentation Manager
PeopleSoft, Inc.
4460 Hacienda Drive
Pleasanton, CA 94588

Or send comments by email to the authors of the PeopleSoft documentation at:

DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 1

About the PeopleSoft 8.3 Human Resources PeopleBook: Manage Positions

This book provides you with the information you will need for implementing and using PeopleSoft Human Resources: Manage Positions.

This chapter complements and extends the About the HRMS PeopleBooks section of HRMS documentation by providing specific information on how to use the documentation for Human Resources. Much of the general information you should know before you begin using PeopleSoft documentation is presented in About the HRMS PeopleBooks.

Note. We strongly recommend that you read About the HRMS PeopleBooks. In particular, the PeopleSoft Application Fundamentals section lists where you can find information about topics that apply to many PeopleSoft applications across the HRMS product line. For example, you can find information about setting up control tables, administering security, and setting language and currency preferences in the *PeopleSoft Application Fundamentals for HRMS PeopleBook*.

See Also

PeopleSoft HRMS PeopleBooks Preface, "About the HRMS PeopleBooks"

PeopleBooks Standard Page Element Definitions

Throughout our product documentation, you will encounter fields that are used on many application pages. This section lists the most common fields and provides standard definitions for Human Resources.

Field	*Definition*
Benefit Plan	A specific benefit offering within a plan type.
Benefit Plan Type	Also known as Plan Type, it is a two-digit code that identifies a benefit category, such as health, life, or savings.
Benefit Program	A collection of benefit plans your company offers to a group of employees.

Field	***Definition***
Deduction	Any amount taken from an employee's pay check to offset all or part of the cost of the employee's benefits.
Deduction Code	The code assigned to a benefit deduction.
FSA Maximum Annual Pledge	This is the total maximum an employee can pledge to contribution to a health or dependent care flexible spending accounts during a benefit plan year.
FSA Minimum Check Amount	This is the minimum amount for which a check will be printed.
Plan Type	Also known as Benefit Plan Type, it is a two-digit code that identifies a benefit category, such as health, life, or savings.

See Also

PeopleSoft HRMS PeopleBooks Preface, "About the HRMS PeopleBooks," PeopleBooks Standard Page Element Definitions

Understanding the Documentation

Documentation for PeopleSoft Human Resources is made up of 25 business processes, each with their own book:

- Administer Company Cars
- Administer Festive Advance
- Administer Salaries for the Netherlands
- Administer Salary Packaging
- Administer Training
- Administer Variable Compensation
- Administer Workforce
- Base Benefits
- Manage Commitment Accounting
- Manage Competencies
- Manage French Public Sector
- Manage Netherlands Salary Administration
- Manage Performance
- Manage Positions

- Manage Professional Compliance
- Meet Regulatory Requirements
- Monitor Absence
- Monitor Health & Safety
- Plan Careers and Successions
- Plan Salaries
- Recruit Workforce
- Report Total Compensation
- Track Faculty Events
- Track Flexible Service
- Track Global Assignments

Human Resources Reports

The documentation for the Human Resources reports is in the reports chapter in the *PeopleSoft Application Fundamentals for HRMS PeopleBook*. There you will find information about each report, listed by module.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Appendix: PeopleSoft Application Fundamentals for HRMS Reports”

CHAPTER 2

Manage Positions Overview

This chapter provides an overview of the Manage Positions business process in PeopleSoft Human Resources and discusses how to:

- Use positions versus job codes to structure your human resources system.
- Decide when to use Position Management.

Using Positions Versus Job Codes to Structure Your Human Resources System

You can structure your human resources system by position instead of by employee.

- When you structure your HR system by employee, you get broader information about your organization's jobs. Use job codes to group jobs into general classifications so job codes and employees have a one-to-many relationship. Many employees share a job code, though they might perform the work in different departments, locations, or companies. Identify the job an employee performs through the data you enter in their employee record.
- Use positions to track details on a particular job in a particular department or location, they usually have a one-to-one relationship with employees. When you structure your system by position, you attach data to the positions and move employees in and out of those positions. Track specific information related to a position, such as salary or standard hours, regardless of whether an employee fills it. By focusing on the position, you can track information related to it, regardless of whether an employee holds the position. When the position is vacant you won't lose the common thread that binds the data together. Use data specific to each position as the basis for organizational planning, recruitment, career planning, and budgeting.

Deciding When To Use the Manage Positions Business Process

- If your organization is fluid—you tend to view broader groupings of employees and often create new jobs—you'll probably find that structuring the system by employee is best. This method is useful if your organization is expanding, or if you often create new jobs or job types.

- If your organization is fairly static—jobs, job descriptions are mostly fixed, and people move in and out of them—you'll probably find that structuring the system by position is most effective. Government agencies and hospitals, which plan positions based on budgets, find this method useful.

- If both methods serve you well in different areas of your organization, you can choose to structure PeopleSoft Human Resources by position for only some departments or management levels, and that structuring the system by employee works well for others. PeopleSoft Human Resources enables you to use both—select a setting called partial position management to use both methods wherever they suit you.

Advantages of using Manage Positions include:

- Creating and tracking position data and its history.

- Processing employee appointments by position.

- Maintaining incumbent data.

- Maintaining organizational structures.

- Budgeting for positions and departments.

- Viewing incumbent, position, and budget histories.

Disadvantages to implementing Manage Positions include additional data setup and maintenance.

CHAPTER 3

Setting Up Positions

This chapter provides an overview of setting up positions and discusses how to:

- Set up occupation series classifications and standards.
- Set up organization position titles.
- Create positions.
- Assign employees to positions.

Understanding Positions

PeopleSoft Human Resources helps your organization keep an effective-dated history of all positions, regardless of whether they are filled. If jobs and their scope change less often than the employees filling them in your organization, PeopleSoft Human Resources enables you to structure human resource data by position. You can track organizational reporting relationships independently of the employees in the positions. To do this, enable the Manage Positions business process on the HRMS Options - Installation page.

In this section, we discuss:

- Tables you must set up.
- Managing position data.
- Managing position data security.

Setting Up Tables

When the system assigns position defaults, it uses information stored in the system general tables. The system uses this same information when you structure your human resources system by employee. However, with Position Management you set up all the data in advance, so when you hire an employee, all you do is assign them to a position, and the system uses the position information to complete the rest of the job data record.

Before you start working with the pages described in this chapter, you *must* set up information in the following tables:

- Installation Table

- Department Table
- Company Table
- Job Code Table
- Location Table (USF Location Table)
- Pay Group Table
- Union Table
- Federal users must also set up the Sub-Agency Table and POI Table control tables.

If you have implemented multiple business units and setIDs in your PeopleSoft Human Resources system, the information that you use and create will be determined by how business unit and setID functionality has been set up for your user ID.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Regulating PeopleSoft HRMS System Data" and "Setting Up PeopleSoft HRMS" and "Setting Up Companies, Agencies, and Locations" and "Setting Up Jobs and Pay Groups" and "(USF) Setting Up Human Resources Management Tables.

Managing Position Data

When you create new positions, PeopleSoft Human Resources uses data that you entered in the Department Table and Job Code Table and inserts the default values in several position data fields. You can override the defaults whenever you need to enter exceptions for a particular position.

Table Name	***Position Data Fields Populated***
Department Table	Location Company
Job Code Table	Standard Hours Union Code Title Detailed Job Description

Note. If your salary administration plans are associated with locations, the standard hours are determined by the standard hours for the location as specified in the Salary Plan Table page. If salary plans aren't associated with locations, the standard hours are determined by the Job Code Table. However, if you later modify the value for the job code in either the Salary Plan Table or the Job Code Table, the system doesn't update the value in the Position Data component.

Updating Position Changes in the Job Data Component

Several fields in the Position Data component match fields in the Job Data component. When you modify information in the position data fields, the system maintains matching fields in the position incumbent's job data record. The following table lists the fields that overlap with the Job Data component and what happens when information changes in the Position Data component:

Change to Position Data Field	***Resulting Change to Corresponding Job Data Field***
Action Date	No change
Adds to FTE Actual Count	Change
Business Unit	Change
Classification Indicator	Change
Company	Change
DeptID (department ID)	Change
Effective Date	No change
FTE (full time equivalent)	No Change
Full/Part Time	Change
Grade	No Change
Job Code	Change
Location	Change
Position Number	No change
Reason Code	No change
Reg/Temp (regular/temporary)	Change
Regular Shift	Change
Regulatory Region	Change
Salary Plan	No Change
Standard Hours	No Change
Step	No Change
Union Code	Change

Salary changes made in the Position Data component aren't reflected in the Job Data component because an update would require a complete recalculation of the multiple components of the pay package; such an update must be initiated by the Job Data component.

(USF) Updating Position Changes in the Position Incumbent's Job Record

Several fields in the Position Data component match fields in employee data records. When you modify information in the position data fields, the system maintains matching fields in the position incumbent's job data record. The following table lists the fields that overlap with the incumbent job data records and what happens when information changes in the Position Data component:

Change to Position Data Field	***Resulting Change to Corresponding Incumbent Data Fields***
Action Date	No change
Adds to FTE Actual Count	Change
Agency Location	Change
Bargaining Unit	Change
Business Unit	Change
Classification Indicator	Change
Company/Agency	Change
DeptID	Change
Effective Date	No change
FLSA Status (Fair Labor Standards Act)	Change
FTE	No Change
Full/Part Time	Change
Grade	No Change
Job Code	Change
Location	Change
Pay Plan	Change
Pay Table (Salary Plan)	Change
POI	Change
Position Number	No change
Position Occupied	Change
Reason Code	No change
Reg/Temp	Change
Regular Shift	Change
Regulatory Region	Change
Salary Plan	No Change
Standard Hours	No Change
Step	No Change
Sub-Agency	Change
Union Code	Change

Modifying Position Data Pages

If you decide to remove a field from Position Data pages that also appears in employee tables, you can continue to track the information on the employee side. If you decide to remove a field from the employee table that also appears in Position Data, you can continue to track the data on the position side, but the system won't update the employee tables. Either way, before you make changes, determine which new and old fields overlap employee tables and plan system modifications accordingly.

Note. To add, modify, or remove fields from Position Data pages, contact your human resource project leader.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up PeopleSoft HRMS"

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce" and "Updating Workforce Information" and "(USF) Administering Personnel Action Requests" and (USF) Processing Personnel Action Requests"

Managing Position Data Security

If you try to create a position (using the Add action) that already exists in PeopleSoft Human Resources, the system displays a message informing you that a position already exists with that number and enables you to access the existing record. If you access the record for the position, the system allows you to update the data for the existing position, even if it belongs to a department for which you don't have security access. This is because:

- You won't create duplicate positions in the system, so the system won't issue lower level SQL errors when you create new positions.
- The system enables you to make departmental transfers.

  For example, if a position is moving to your department from another department for which you aren't cleared for security access, you can still make the transfer using the Add action, provided you know the exact position number.

Position data is less sensitive than employee data because no salary data appears in the Position Data pages. Thus viewing position data briefly when the system generates the error message is less critical than being aware of a position's existence in the system. You can modify the system so that users can't see position data even briefly using the Add action.

To prevent users from viewing position data using the Add action:

1. In PeopleSoft Application Designer, access the POSITION_DATA component.
2. Highlight the DESCR field and select PeopleCode, RowSelect.

3. Read the instructions for uncommenting the code that restricts this situation.

4. Change the search record for the Add action to POSITION_SRCH.

See Also

PeopleTools PeopleBook: Application Designer

(USF) Setting Up Occupation Series Classifications and Standards

In this section, we discuss how to:

- Define occupation series classifications.
- Define classification standards.
- Designate the Classification Standards' classification factors.
- Associate classification factor levels and points with classification factors.
- Enter grades and point ranges.

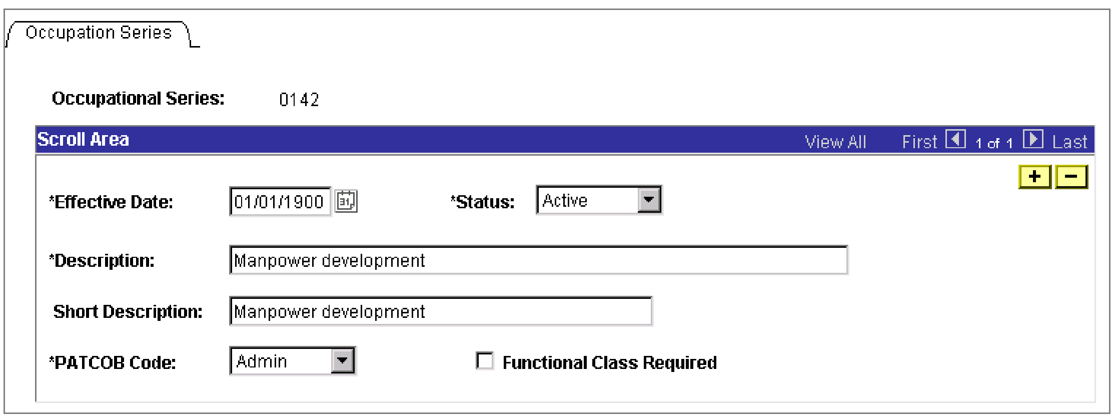
Pages Used to Set Up Occupation Series Classifications and Standards

Page Name	***Object Name***	***Navigation***	***Usage***
Occupation Series	GVT_OCCUPATION_TBL	Develop Workforce, Manage Positions (USF), Setup, Occupation Series, Occupation Series	Define the occupation series classifications.
Classification Standard Table	GVT_CLASS_STD_TBL	Develop Workforce, Manage Positions (USF), Setup, Classification Standards, Classification Standard Table	Create classification standards by establishing a description and level for each type of classification.
Classification Factor Table	GVT_CLASS_FCTR_TBL	Develop Workforce, Manage Positions (USF), Setup, Classification Standards, Classification Factor Table	Designate Classification Standards' classification factors.

Page Name	***Object Name***	***Navigation***	***Usage***
Classification Level Table	GVT_CLASS_LVL_TBL	Develop Workforce, Manage Positions (USF), Setup, Classification Standards, Classification Level Table	Associate classification factor levels and points with classification factors.
Grade Conversion Table	GVT_CLASS_GRD_CNV	Develop Workforce, Manage Positions (USF), Setup, Classification Standards, Grade Conversion Table	Enter a grade and point range for each grade.

Defining Occupation Series Classifications

Access the Occupation Series page.



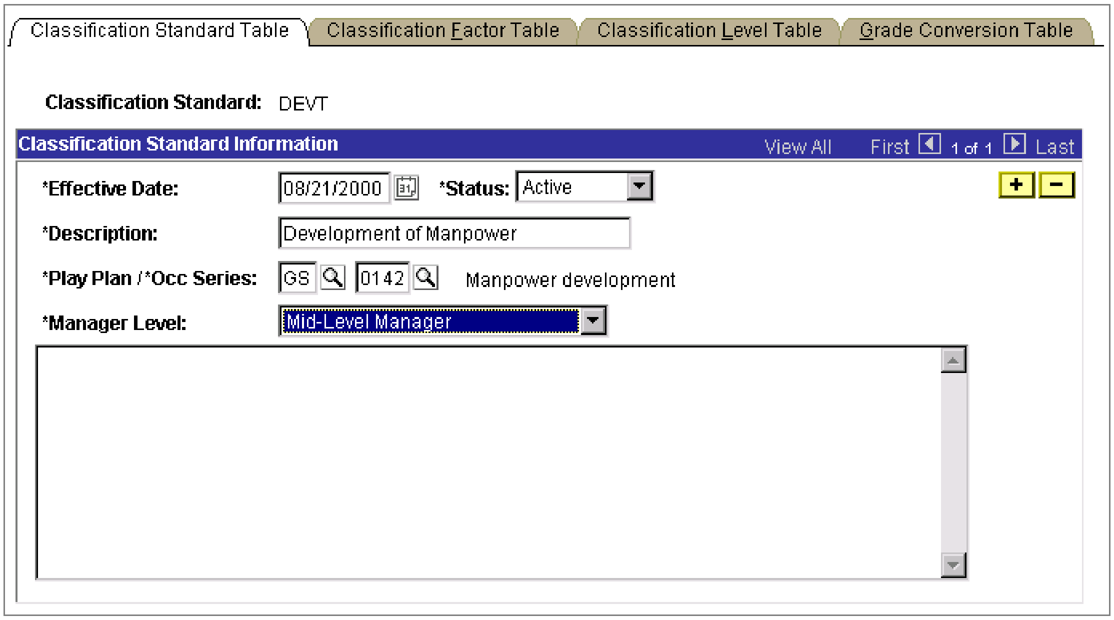
Occupation Series page

PATCOB Code (professional, administrative, technical, clerical, other, blue collar code) — Select the PATCOB code that should be associated with this occupational series from the list of available options.

Functional Class Required — Select if a functional class is required for the position.

Defining Classification Standards

Access the Classification Standard Table page.

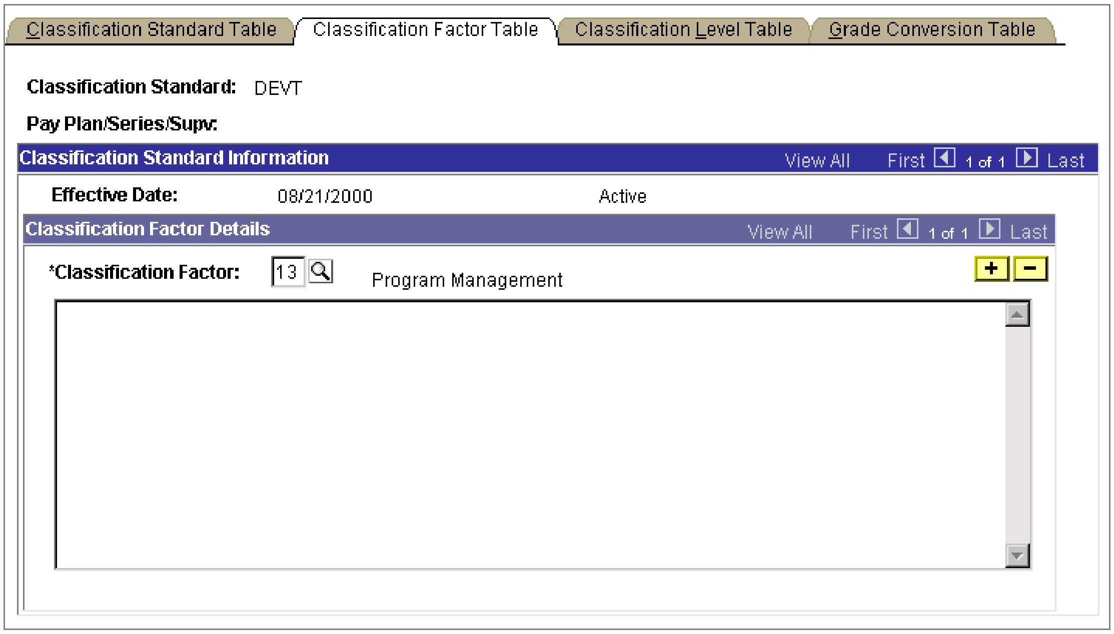


Classification Standard Table page

Pay Plan / Occ Series (occupation series)	Select the occupation series that you want to associate with the classification standard from the list of available options. The system displays the associated pay plan. Occupation series are maintained on the Occupation Series page.
Manager Level	Select the manager level that you want to associate with the classification standard from the list of available options.

Designating the Classification Standards' Classification Factors

Access the Classification Factor Table page.

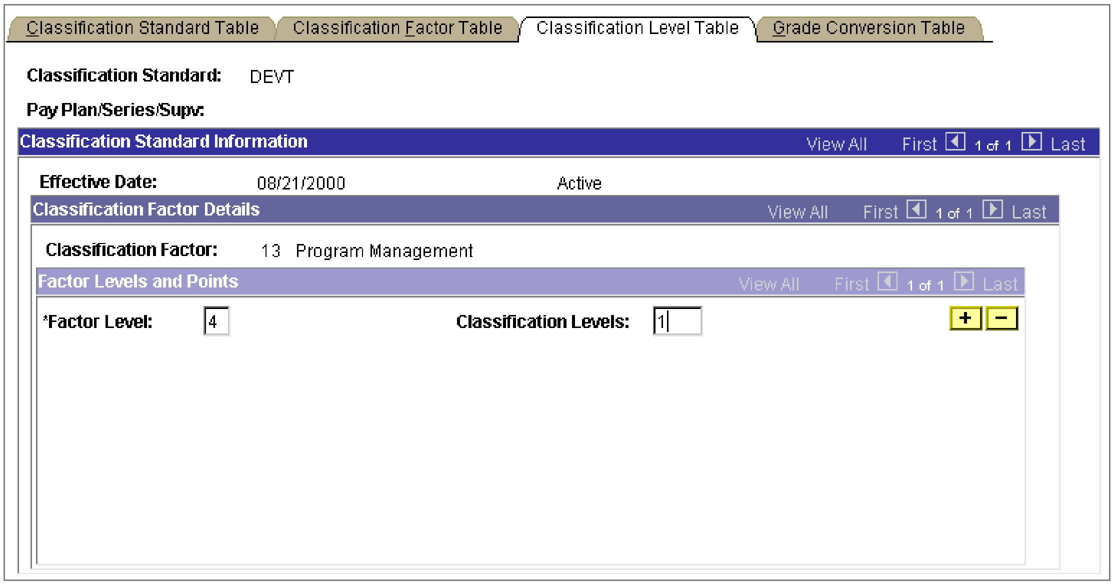


Classification Factor Table page

Classification Factor Select the classification factor that you want to associate with the classification standard from the list of available options. You can associate multiple classification factors with this classification standard by inserting more rows.

Associating Classification Factor Levels and Points With Classification Factors

Access the Classification Level Table page.

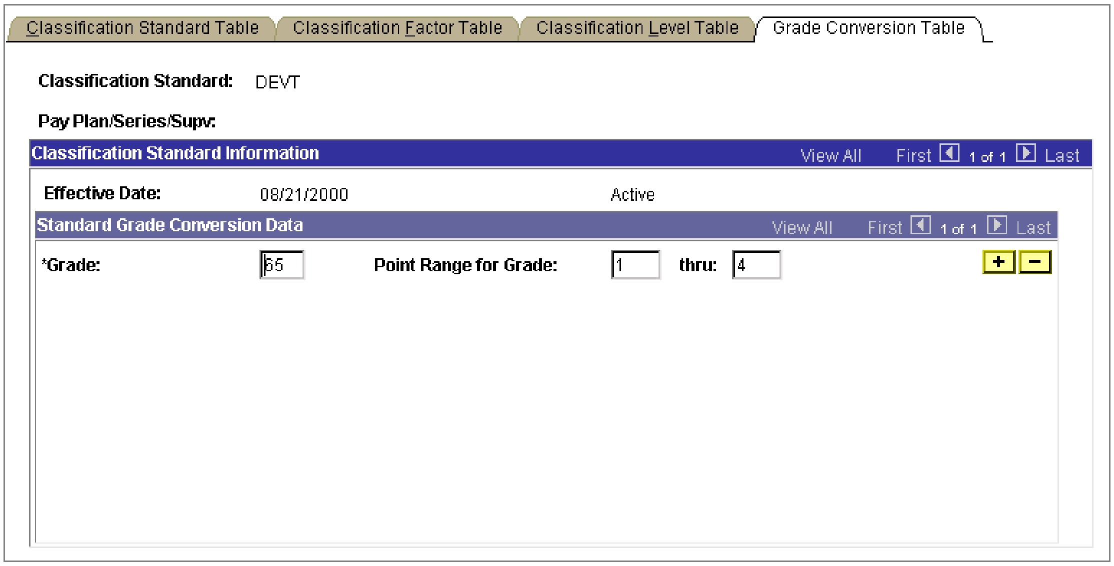


Classification Level Table page

Factor Level	For each classification factor that you specify, enter the applicable factor levels that are relevant to a specific occupation or category of work. Assign multiple factor levels to a classification factor by inserting more rows.
Classification Levels	Assign the point values for each factor level.

Entering Grades and Point Ranges

Access the Grade Conversion Table page.



Grade Conversion Table page

Grade	Enter the grade that you want to associate with this classification standard. Associate multiple grades with this classification standard by inserting more rows.

(USF) Setting Up Position Titles

An *official position title* is the title of a position that is in accordance with the Office of Personnel Management (OPM) position classification standards. An *organizational position title* is the *unofficial* title that is given to a position based on how your agency is organized and where the position fits in the organization.

In this section, we discuss how to:

- Set up official position titles.
- Set up organizational position titles.

Pages Used to Set Up Position Titles

Page Name	***Object Name***	***Navigation***	***Usage***
Official Position Titles - Position Title Codes	GVT_PSN_TTL_TBL	Develop Workforce, Manage Positions (USF), Setup, Official Position Titles, Position Title Codes	Set up official position titles that will later be associated with positions. Before using the page, set up Occupation Series classifications

Page Name	Object Name	Navigation	Usage
Organization Position Titles - Position Title Codes	GVT_ORG_PSN_TTL	Develop Workforce, Manage Positions (USF), Setup, Organization Position Titles, Position Title Codes	Set up organization position titles that will later be associated with positions. Before using the page, set up Occupation Series classifications

Creating Positions

In this section, we discuss how to:

- Assign the position a number and enter essential information, such as position status and description.
- Enter a detailed job description.
- Enter location-specific information, such as company and department.
- Enter information about the job associated with the position, such as job code and standard hours.
- Enter position-specific information, such as position pool ID and work phone number.
- Review budget and incumbent information associated with this position.

Pages Used to Create Positions

Page Name	Object Name	Navigation	Usage
Position Data - Description	POSITION_DATA1	Define Business Rules, HRMS Tree Panels, Key Postn, Key Position, Description	Enter information about the position, such as status information and description.
Detailed Job Description	POSN_DESCR_SEC	Click the Detailed Job Description link on the Position Data - Description page.	Enter a detailed description of the job performed by this position.
Position Data - Work Location	POSITION_DATA2	Define Business Rules, HRMS Tree Panels, Key Postn, Key Position, Work Location	Enter location-specific information about the position.

Page Name	Object Name	Navigation	Usage
Position Data - Job Information	POSITION_DATA3	Define Business Rules, HRMS Tree Panels, Key Postn, Key Position, Job Information	Enter information about the job associated with the position.
Position Data - Specific Information	POSITION_DATA5	Define Business Rules, HRMS Tree Panels, Key Postn, Key Position, Specific Information	Enter information that is specific to the position you're creating, such as the work phone number and the mail drop ID.
Position Data - Budget and Incumbents	POSITION_DATA6	Define Business Rules, HRMS Tree Panels, Key Postn, Key Position, Budget and Incumbents	Review the position's current budget and incumbents.

Description Alternate Navigations

Develop Workforce, Manage Positions, Use, Position Data, Description

Develop Workforce, Manage Positions (USF), Use, Position Data, Description

Develop Workforce, Plan Successions (GBL), Use, Key Position Data, Description

Develop Workforce, Plan Successions (USF), Use, Key Position Data, Description

Work Location Alternate Navigations

Develop Workforce, Manage Positions, Use, Position Data, Work Location

Develop Workforce, Manage Positions (USF), Use, Position Data, Work Location

Develop Workforce, Plan Successions (GBL), Use, Key Position Data, Work Location

Develop Workforce, Plan Successions (USF), Use, Key Position Data, Work Location

Job Information Alternate Navigations

Develop Workforce, Manage Positions, Use, Position Data, Job Information

Develop Workforce, Manage Positions (USF), Use, Position Data, Job Information

Develop Workforce, Plan Successions (GBL), Use, Key Position Data, Job Information

Develop Workforce, Plan Successions (USF), Use, Key Position Data, Job Information

Specific Information Alternate Navigations

Develop Workforce, Manage Positions, Use, Position Data, Specific Information

Develop Workforce, Manage Positions (USF), Use, Position Data, Specific Information

Develop Workforce, Plan Successions (GBL), Use, Key Position Data, Specific Information

Develop Workforce, Plan Successions (USF), Use, Key Position Data, Specific Information

Budget and Incumbents Alternate Navigations

Define Business Rules, HRMS Tree Panels, Position, Position Data, Budget and Incumbents

Develop Workforce, Manage Positions, Use, Position Data, Budget and Incumbents

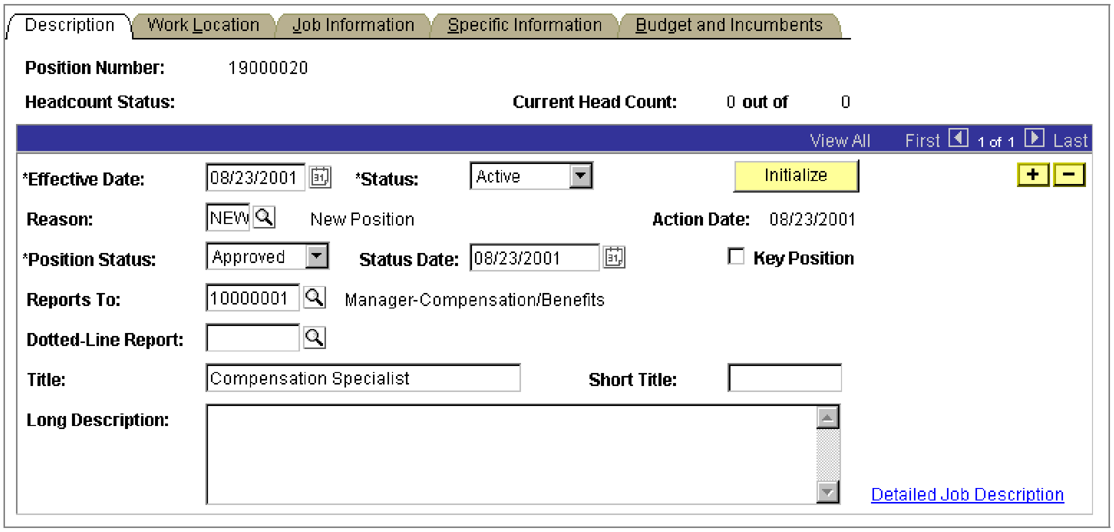
Develop Workforce, Manage Positions (USF), Use, Position Data, Budget and Incumbents

Develop Workforce, Plan Successions (GBL), Use, Key Position Data, Budget and Incumbents

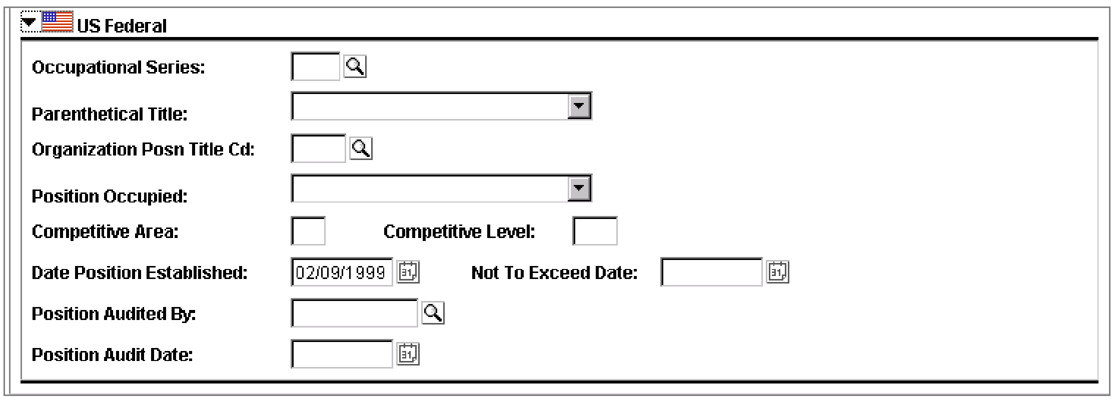
Develop Workforce, Plan Successions (USF), Use, Key Position Data, Budget and Incumbents

Entering Information About a Position

Access the Position Data - Description page.



Position Data - Description page (1 of 2)



Position Data - Description page (2 of 2)

Position Number

The unique number assigned to the position. You can specify the position number when creating a new position or you can allow the system to assign the next number for you (when you Save) by accepting the default value ***00000000*** in the Add a New Value page. To avoid maintaining two different sets of position numbers, PeopleSoft recommends that you either always assign numbers manually or always allow the system to do it; do not do both.

Initialize	**Note.** This button appears only if you're adding a new position. Click to copy all or many of the characteristics of a similar existing position. When you click this button, a dialog box prompts you for the position number of the position that you want to copy. Click OK to populate the Position Data component with the position information of the position that you selected. You can override any information that doesn't apply to the new position. If you aren't aware of any similar positions that you could use to populate the remaining fields, just populate the key fields individually.
Reason	Select a reason for the change or creation of the position from the list of available options.
Position Status	Indicate when the position is ***Approved, Proposed,*** or ***Frozen.***
Reports To	To establish reporting relationships, select the position number that this position reports to from the list of available options. If this is the top position record, enter the position's number here. For example, in the CEO's position record, enter the CEO's position number in this field.
Dotted-Line Report	If there is a dotted line reporting relationship to another position, select that position number from the list of available options.
Title	Enter a description of the position in this field. If you leave this blank and later select a job code on the Job Information page, this field will display the title associated with that job code. You can override the default value. This information appears on the incumbent's Employment record.
Long Description	Describe the position in more detail. This field displays information from the Job Code Table when you select a job code on the Job Information page.
Key Position	Select if this is a key position.
Short Title	Enter a short title of the position. When you select a job code on the Job Information page, this field displays the short title associated with that job code. You can override the default value.
Detailed Job Description	Click this link to access the Detailed Job Description page and enter a detailed job description, if required, for this position.

(USF) US Federal

Occupational Series	Verify that the default value is correct and select a new one if necessary.
Parenthetical Title	The parenthetical title appears for those positions whose duties and responsibilities fall within the auspices of Office Automation, Stenography, Typing, and Data Transcribing. The parenthetical title becomes part of the organization position title for reporting purposes so there is no need to create separate job codes for these positions. However, the parenthetical title may have an effect on whether this position is covered by a special rate. Therefore, to save data entry time and ensure data consistency, consider creating separate job codes for those positions that are covered by special rates and those that aren't.
Organization Posn Title Cd (organization position title code)	Select the organization position title code if there is more than one position with the same organization position title.
Position Occupied	Select the appropriate OPM position definition. Most positions use the Competitive Service or the Excepted Service definition.
Competitive Area and **Competitive Level**	These fields are used mainly for Reduction-in-Force (RIF) processing but may also be used intermittently for internal placement purposes. These fields contain values assigned locally that group similar jobs together using criteria such as grade, location, duties, and responsibilities to ensure equitable job comparisons.
Date Position Established	This date must be the same as or earlier than the effective date of the position.
Not To Exceed Date	If you specified this position as Temporary in the Reg/Temp field on the Job Information page, specify the date on which the position should expire in this field.
Position Audited By	If your agency does periodic position or desk auditing, you can track the auditor who audited the position. Select the auditor from the list of available options.
Position Audit Date	If your agency does periodic position or desk auditing, you can track the date the position was audited. Enter the date the position was audited.

Establishing Reporting Hierarchies by Creating a Top Position

Use this page to establish a reporting hierarchy among positions using the Reports To and Dotted-Line Report fields. Once you've created a hierarchy, you can run POS006A, Build Position Tree Structure Codes, so that you can generate the Indented Position Hierarchy report, POS006, to report on your organizational chart.

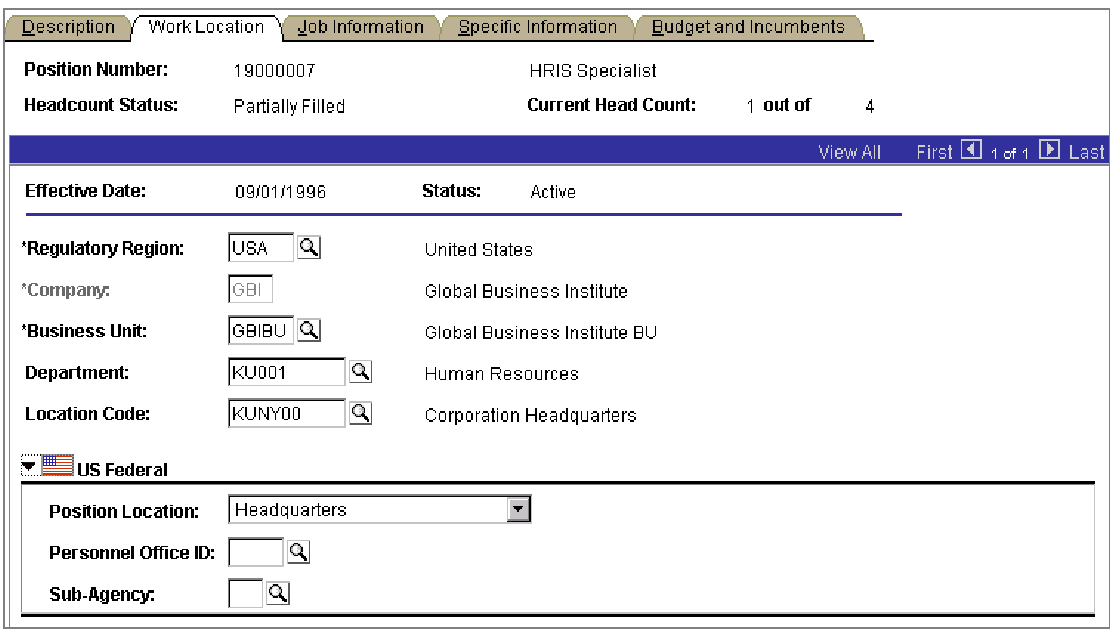
To establish reporting hierarchies, you must create a top position that reports to itself.

To establish a top position:

1. Add the top position.
2. Save the top position.
3. Enter the top position number in the Reports To field on the top position's Position Data - Description page.
4. Save the top position again.

Entering Work Location Information

Access the Position Data - Work Location page.



Position Data - Work Location page

Company

When you select a department this field displays the associated company and is unavailable for entry. If the department that you select has no associated company, select one from the list of available options.

Department

Select the department that this position is associated with from the list of available options. If the department that you select has an associated company or location code, these values appear in their respective fields.

Location Code — When you select a department this field displays the associated location code. If the department that you select has no associated location code, select one from the list of available options. The Salary Plan on the Job Information page is automatically set to the salary plan value associated with this location, if one has been specified.

(USF) US Federal

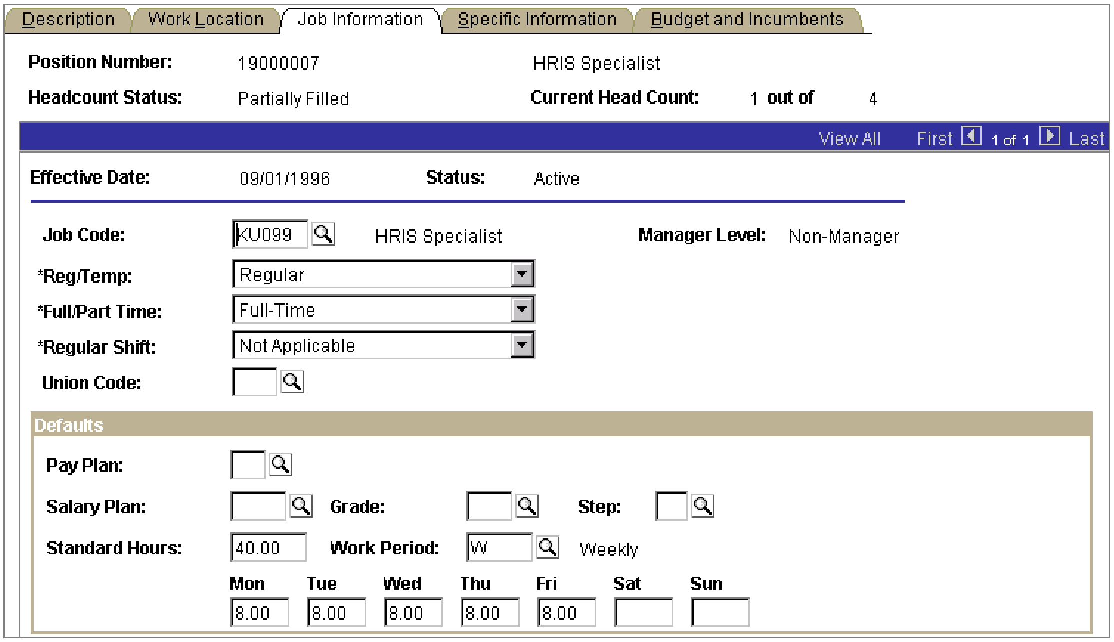
Position Location — Select ***Field*** or ***Headquarters.***

Personnel Office ID — The Personnel Office identifies the Human Resources Office within your agency that is responsible for maintaining the system of records for this position and its incumbents, and for processing Personnel Action Requests (PARs).

Sub-Agency — This field is set by default to a value stored in the department table when you select a department on the Work Location page. You can override this value if necessary.

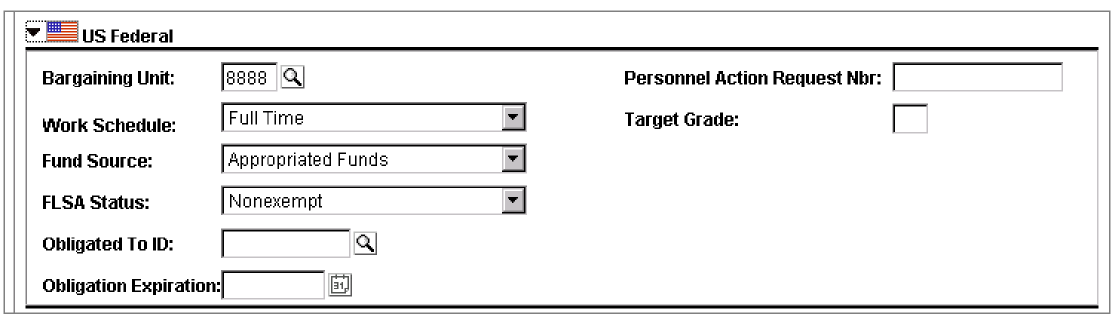
Entering Job Information

Access the Position Data - Job Information page.

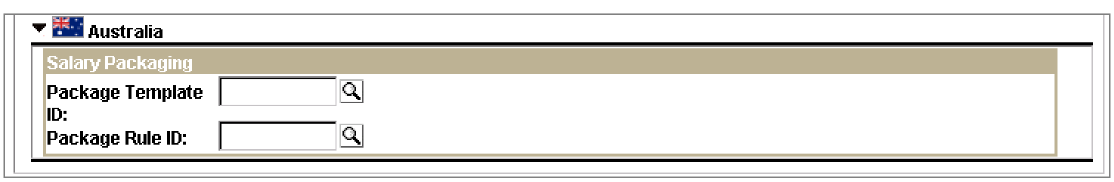


Position Data - Job Information page (1 of 4)

Position Data - Job Information page (2 of 4)



Position Data - Job Information page (3 of 4)



Position Data - Job Information page (4 of 4)

Job Code

Select the job code that this position is associated with from the list of available options. When you select the job code, the system populates values for the following fields:

- Title and Short Title on the Description page.

- Detailed Job Description on the Detailed Job Description page.
- Union Code, Grade, Step, Standard Hours, and Work Period on the Job Information page. The default value in the Salary Plan field comes from the Job Code Table if a salary plan isn't associated with the position's location.

Reg/Temp (regular or temporary)

The system enters a default value of ***Regular*** for a new position. If the position is temporary, select ***Temporary*** from the available options.

(USF) Note. For Federal users, if the position is ***Temporary,*** enter a date in the Not To Exceed Date field on the Federal Data Position Job Information page.

Full/Part Time (full-time or part-time)

The system enters a default value of ***Full-Time*** for a new position. If the position is part-time, select ***Part-Time*** from the available options.

Regular Shift

If your organization assigns shifts to positions, select a regular shift code.

Defaults

Pay Plan

(USF) This field is for Federal users only.

Salary Plan

Select the salary plan associated with the position from the list of available options. The value that you select appears on the Job data component when you assign a new employee to a position. Any further updates to the salary information of a position incumbent must be performed at the employee level on the Job Data component.

Standard Hours

Enter the standard hours worked in the associated **Work Period** for this position. For example, if the **Work Period** is ***Weekly,*** the **Standard Hours** might be 40.0.

Work Period

Select the work period associated with this position. The work period is the smallest unit of time that employers use to communicate working hours to their employees.

If you select a ***Weekly*** **Work Period,** enter the hours worked per day in the fields provided.

(GER) Germany

From Grade/Step and **To Grade/Step**

Enter the salary grade and step from which the salary range begins and which the salary range ends for this position.

(USF) US Federal

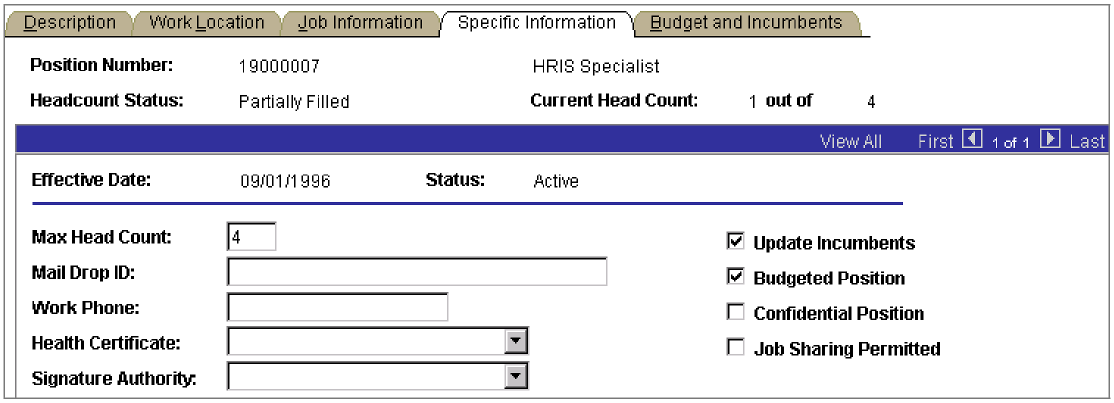
Bargaining Unit	Enter the union bargaining unit associated with this position, if appropriate.
Work Schedule	Verify that this field's default value is correct and select a new one if necessary.
Fund Source	Select a valid fund source code to identify the primary source of funding for this position, whether it is appropriated funds, non-appropriated funds, external funds, or other.
FLSA Status (Fair Labor Standards Act status)	Determine the appropriate coverage under the Fair Labor Standards Act, and select either ***Exempt*** or ***Nonexempt.***
Obligated To ID	If this position must be obligated to a specific employee because they have return rights to the position, enter the ID of the employee to whom the position is obligated.
Obligation Expiration	Enter the date that the obligation expires.
Target Grade	Select if this position has a target grade.

See Also

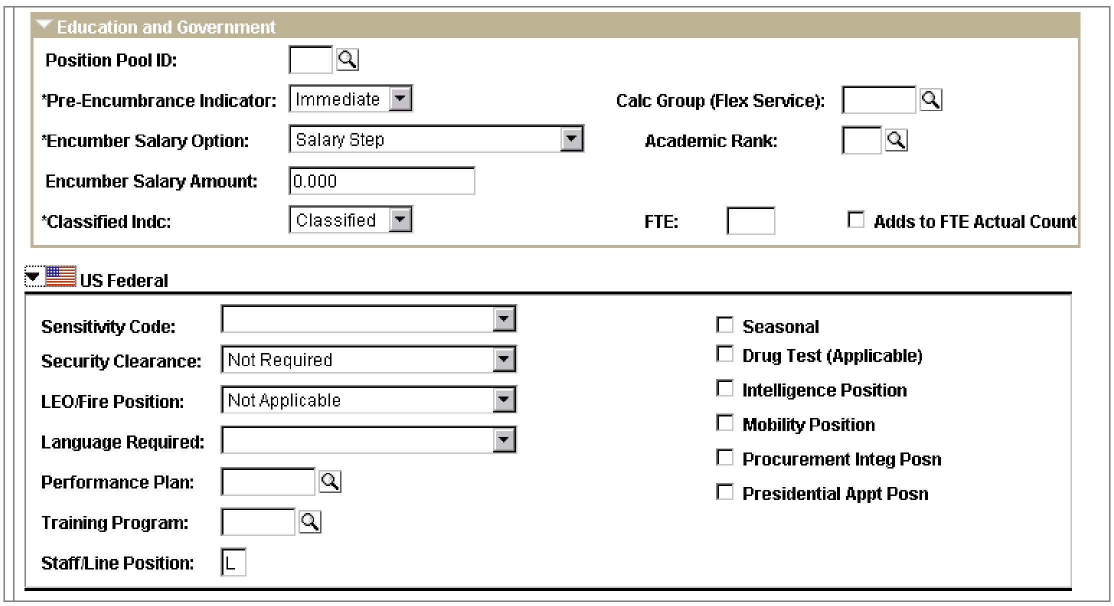
PeopleSoft Human Resources PeopleBook: Plan Salaries

Entering Position-Specific Information

Access the Position Data - Specific Information page.



Position Data - Specific Information page (1 of 2)



Position Data - Specific Information page (2 of 2)

Max Head Count (maximum head count)	Enter the maximum head count allowed for this position. The default value is ***1*** because positions normally have a one-to-one relationship with employees (a position usually has one person assigned to it). However, if this position permits job sharing or can be assigned to more than one person, change the head count to the appropriate number.
Mail Drop ID and **Work Phone**	Enter the mail drop ID and work phone number assigned to this position, if applicable.
Health Certificate	Select the health certificate required for this position from the list of available options, if applicable.
Signature Authority	Select the signature authority assigned to this position from the list of available options, if applicable.

Update Incumbents	Select to have the system automatically update incumbent job data on the Job Data component. This option isn't applicable until you have assigned an employee to the position. **(USF) Note.** Federal users don't currently use this field.
Budgeted Position	This check box is selected by default. If this position's status is proposed or frozen, clear this check box. Otherwise, leave it selected for reporting purposes, so that the system knows that this is an approved position.
Confidential Position	Select if this position is confidential.
Job Sharing Permitted	Select if job sharing is permitted for this position. If job sharing is permitted, indicate the position's maximum head count (the maximum number of people who can share the position) in the **Max Head Count** field.

(E&G) Education and Government

Position Pool ID	If appropriate, select a position pool ID from the list of available options. This code maps to the position pool with which this position should be budgeted in Commitment Accounting. Position pools enable you to group related positions together for budgeting purposes. For instance, you could group all positions related to your PeopleSoft HRMS implementation project in a single position pool and then assign a budget to that pool.
Pre-Encumbrance Indicator	Indicate if you want the position to encumber immediately ***(Immediate),*** not at all ***(None),*** or upon requisition ***(Requistn).***
Encumber Salary Option	If you encumber salaries using Manage Commitment Accounting, select an encumber salary option. The system uses the option that you select here to determine salary when it encumbers the salaries of vacant positions.
Encumber Salary Amount	If you encumber salaries using Manage Commitment Accounting, enter an encumber salary amount. The system uses the amount that you enter when it encumbers the salaries of vacant positions. The system will display this field when you select ***User Specified Amount*** in the **Encumber Salary Option** field.
Classified Indc (classified indicator)	Use this field to associate the position with an FTE Classification that you established on the Department Budget FTE page. When you hire a worker into a position in the Administer Workforce menus, the system displays the FTE data tied to the Position in the Job Data pages for the worker.

Calc Group (Flex Service) (calculation group [flexible service])	If you are using Tracking Flexible Service, select a calculation group for this position.
Academic Rank	If this is a faculty position, select an academic rank.
FTE	Enter the FTE value for this position to be used for defining an FTE budget in Commitment Accounting.
Adds to FTE Actual Count	Select to include this position when processing FTE edits for budgeting purposes. Don't select this check box if you don't want to include this position when processing FTE edits.

(USF) US Federal

Sensitivity Code	The sensitivity code is a standard OPM code. This value is set by default from the job code but can be overridden here.
Security Clearance	You can specify whether security clearance is required for this position and, if so, what type of clearance is needed. This field may be used by the Staffing/Recruitment function when defining job requirements. The same is true for the **Language Required** field.
LEO/Fire Position (law enforcement officer/fire position)	For pay and benefits purposes, specify whether the position is subject to special provisions.
Language Required	If this position requires a language other than or in addition to English, selecting a value from the available language options.
Performance Plan	Depending on how you implement the Manage Performance business process, this field associates your positions with performance plans that you establish using this business process. You can create specific performance plans and standards for each position, or you can create more generic descriptions of performance expectations. In either case, Manage Performance and Manage Positions are closely associated using this field. This isn't a required field. You might not implement Manage Performance at all in your agency.
Training Program	Indicate the training program associated with this position. Employee development is a critical Human Resource function. Training programs are developed by the employee development functions and recorded in the system in the Administer Training business process. This information is also used in Plan Careers and Successions.
Staff/Line Position	Identify whether this is a staff ***(S)*** or line ***(L)*** position.

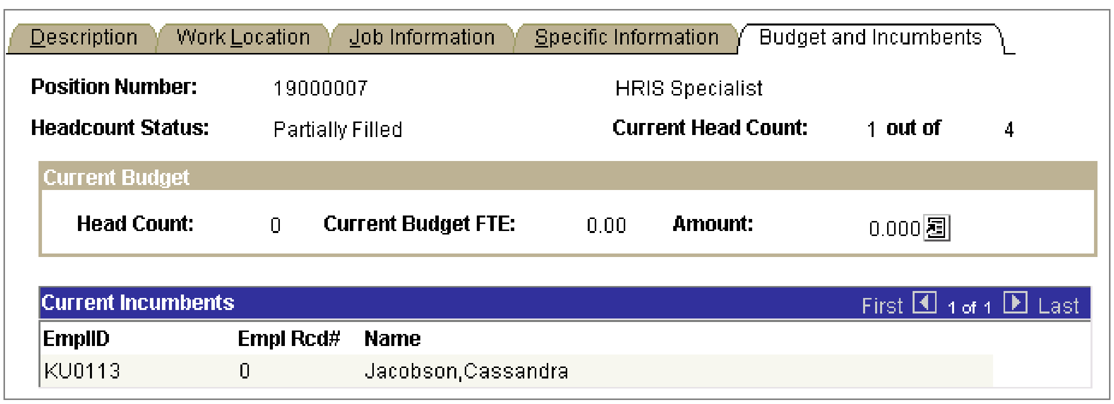
Seasonal	Select to identify the position as a seasonal position.
Drug Test (Applicable)	Select to indicate if a drug test is applicable for incumbents to this position.
Intelligence Position	Select to indicate that this position belongs to the intelligence community.
Mobility Position	Select to identify the position as critical and one that must be manned in the event of war or other mobilization or emergency.
Procurement Integ Posn (procurement integrity position)	Select to identify the position as one covered by the Procurement Integrity Act.
Presidential Appt Posn (presidential appointment position)	Select to identify the position as one that requires a presidential appointment.

See Also

"Managing Position Data"

Reviewing Budget and Incumbent Information

Access the Position Data - Budget and Incumbents page.



Position Data - Budget and Incumbents page

Current Budget	The **Current Budget** group box displays the **Head Count, Current Budget FTE,** and salary **Amount** budget information for this position, if you have created a budget for this position at the position level. For USF customers, the **Current Budget** group box displays the position's budgeted **Earnings, Deductions, Tax, Cdn** (Canadian) **Tax** (if applicable), and the **Total** budget for the position.

Current Incumbents	After you assign an employee to the position, this group box displays the incumbent's **EmplID** (employee ID), **Empl Rcd#** (employee record number), and **Name.**

Assigning Employees to Positions

Once you've set up positions, you can assign employees to them. Enter personal data for employees on the Administer Workforce Personal Data pages. Because you have already set up most job-related data on the Manage Positions pages, the system automatically populates organizational and job data in many fields on the employee Job Data pages.

CHAPTER 4

Managing Position Data

This chapter provides an overview of how to manage position data and discusses how to:

- Maintain position data.
- Update position data.
- Update incumbent job data.
- Verify position data.

Maintaining Position Data

Periodically, you have to enter changes to position data, such as a title change or a position that becomes inactive. You also must update employee data occasionally, such as entering a pay rate change or a leave of absence. You might make a change that affects both position and *incumbent* (an employee assigned to a position) job data, such as changing the department code for their position. To do this, use the same pages that you used to create positions and assign employees to them.

The system processes the position data changes differently if the data that you are updating pertains only to the employee, only to the position, or affects both position and incumbent job data.

In this section, we discuss:

- Determining where to update data.
- Distinguishing incumbent and position data.

Determining Where To Update Data

Once you've determined the type of change that you want to make, where do you make the changes?

- For incumbent data, go to the Administer Workforce Job Data component to make your changes.
- For position-related data, make your changes in the Position Data pages.

- If your changes affect both position and incumbent data, use the Position Data pages; the system automatically maintains the current incumbent data in the Job Data pages.

Note. The Update Incumbents functionality isn't active for Federal users. Federal users must update incumbent data manually to reflect changes made in the Position Data pages.

In this chapter, we discuss how to update position data and data that affects both the position and current incumbent.

For example, when you want to move positions from one location to another, use the Position Data pages to make the changes. Enter a new department or location to move the position *and* the current incumbent to the new locale or department. This type of transfer implies that the employee is making a lateral move and not getting a promotion or a pay increase.

Use the Transfer Action in the Administer Workforce Job Data pages when you are moving an employee from one position to another. This type of transfer implies that the employee is being promoted or demoted and will get a pay change.

(USF) Determining Where To Update Data

Once you've determined the type of change that you want to make, where do you make the changes?

- For employee data, go to the Administer Workforce (USF), HR Processing component to make your changes.
- For position-related data, make your changes in the Position Data component
- If your changes affect both position and incumbent data, use the Position Data component and then update the employee-level information in the components in the Administer Workforce menu.

In this chapter, we discuss how to update position data and data that affects both the position and current incumbent.

Use the Transfer Action in the Administer Workforce (USF), HR Processing pages to move an employee from one position to another. This type of transfer implies that the employee is being promoted or demoted and will get a pay change.

Distinguishing Incumbent and Position Data

Depending on the type of information that you're updating, you make changes in the Position Data pages or in the Job Data pages. Before you begin, consider what kind of action that you are taking because the action controls whether your changes affect incumbent data, position data, or both position and incumbent data. Furthermore, the type of data determines where you make your changes in PeopleSoft Human Resources.

Position Data Changes

If you are making changes to the position, such as changing the position's DeptID, Salary Plan, or Title, make these changes in the Position Data pages. These changes are applied to the position and the next incumbent. Changes to salary, for example, won't apply to the position's current incumbent but will be the salary default values on the Job Data record for the next incumbent.

Changes to some fields in the Position Data component update the incumbent's job record. In the Updating Position Changes to the Job Data Component section (USF Updating Position Changes to the Position Incumbent's Job Record for HRMS for Federal Government users) of Setting Up Positions, is a table of fields that are common to the Position Data component and the incumbent's job record. The table indicates which of those fields are updated in the job record when changed in the Position Data component.

Incumbent Data Changes

If you want to make a change that affects only the employee and not the position, make the changes on the incumbent's job record. Note that these are changes that aren't to be associated with the position and applied to future incumbents or they are changes independent of position. This includes changes in the incumbent's salary, employee status, such as Leave of Absence or Rehire, or position assignment, such as a transfer or promotion.

Position and Incumbent Data Changes

If you are making a change to a Position Data field that doesn't update the incumbent's job record, make your change in both the Position Data pages and the incumbent's Job Data record. For instance, changes to salary won't apply to the position's current incumbent because of system calculations. If you want to adjust the incumbent's salary and update the position with the new salary so that it will apply to the next person assigned to the position, make a change in both components.

See Also

"Creating Positions"

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce" and "Updating Workforce Information" and "(USF) Administering Personnel Action Requests" and (USF) Processing Personnel Action Requests"

Updating Position Data

Use the Position Data pages to make changes to any information that pertains to the job or position itself, such as moving the position from one department to another, work phone, and status.

In this section, we discuss:

- Making changes to position data.
- Understanding effective dates and updating position data.

To make changes to position data, follow these steps:

1. Open Position Data - Description..

2. Insert a new data row.

   The system enters the system date, which is usually today's date, as the Effective Date. Change this unless today is the first day that the change takes effect.

3. Enter a reason for the new row.

4. Make your changes to the appropriate pages.

5. Save the changes that you made to the position.

Effective Dates and Updating Position Data

You usually update position information in PeopleSoft Human Resources by adding effective-dated data rows to the position data and incumbent job records. Effective dates enable you to maintain a complete chronological history of all your data and tables, whether you changed them two years ago or want them to go into effect in two months. With this information, you can *roll back* your system to a particular time to perform analyses on position data or employee records. Similarly, you can *roll forward* and set up tables and data before they take effect.

The system also uses effective dates to compare pages and tables so that the prompt tables that you see display only the data that is valid as of the effective date of the page on which you're working.

Effective dates are always important in PeopleSoft Human Resources, but they take on special significance when you maintain positions, particularly when you change data in the fields that appear in both the Position Data and Job Data pages. To update this information, enter the changes by inserting new data rows in the Position Data pages. The system maintains the data in the current incumbent Job Data pages by inserting a new data row for you with the same effective date.

However, the system can only maintain the incumbent data if the new or changed data row is either the *current* row or a *future* row for both position data and job data. Unfortunately, PeopleSoft Human Resources can't determine your intention: it doesn't know whether you wanted overrides on or off in the past, whether you made mistakes that you're trying to fix, or whether you just forgot to put some data in when it took effect. If the system inserted data rows with effective dates that fell in the middle of either of the *stacks,* you'd run the risk of getting the effective dates out of order and having incorrect data inserted.

This also means the system cross-updates *current* incumbent job data. It can't go back and update previous incumbents that were assigned to the position because they are linked in historical data rows. The only way to make sure historical information matches in both the position data table and the incumbent job data table is to update it manually.

To make sure the system cross-updates data when you want it to and to save yourself cross-checking time, try to update data in both the Position Data and Job Data pages in the correct chronological order the first time that you enter it or make corrections shortly thereafter.

Only one person should update the incumbent and position data in both the Administer Workforce pages and the Position Data pages because the effective dates and sequence of data rows greatly affect how the system updates and maintains matching incumbent and position data. So that they can update data in both places, the user must have security access to both the position and the person.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Administering PeopleSoft Security”

Updating Incumbent Job Data

When you make changes to data in the fields that appear in both the Job Data and Position Data pages, always use the Position Data pages unless you are updating standard hours. Update standard hours information using the Job Data pages. You can easily determine which rows the system created in the Job Data pages as the Position Management Record check box will be selected.

In this section, we discuss:

- Updating job data.
- Inserting new rows.
- Deleting rows.
- Making corrections.
- When not to update job data.

Note. In-line promotions—where the job code and salary data changes, but the position doesn’t—affect incumbent salary. Use the Position Data pages to change the job codes for positions. Once you save this information, use the Administer Workforce pages to update the incumbent salary. If your organization uses salary steps in its compensation structures and the Multi-Step check box in the Installation Table is selected, don’t enter the salary amount. Instead, select the new salary plan, grade, and step, and the system will enter the appropriate salary amount.

To ensure that the system cross-updates the incumbent job record when you want it to, follow these guidelines, which vary with the action that you take:

- When you make insertions, deletions, or corrections to job data that affect the current incumbent payroll (Payroll for North America), the system, where needed, marks payline records for recalculation. When payroll is recalculated, the payroll system uses the new information.
- When you make insertions, deletions, or corrections to the current incumbent Job Data or Employment data that affect benefits, the system sets the flags controlling event maintenance to indicate that a change has occurred. During the next event maintenance process, the system will process the event.
- When a position changes from full- to part-time, the system automatically sets the flag for COBRA activity in benefits.

Updating Job Data

You modify data in the Position Data pages by making insertions, deletions, and corrections. Because the changes that you make to the position management pages can impact the incumbent's job data, when you undertake any of these actions in the Position Data pages, it can have significant consequences in the Job Data pages. The following sections outline how the system updates the Job Data pages after you make changes in the Position Data component.

Inserting New Rows

The most common way that you make changes is by inserting new data rows. You can enter a new effective date and make changes without losing any of the data that was already in the record.

When the system updates incumbent job data, it inserts a new data row on top of the current row. If you have already inserted any future job data rows, the system also updates the future rows with the changes that you made.

So that the system updates incumbent job data when you insert new rows, make sure that you check the following options:

- The position row that you insert is current or future effective-dated.
- The Position Override check box in the current incumbent Job Data, Work Location page is clear in the current job data row.
- The Update Incumbents check box in Position Data, Specific Information page is selected.

You can verify that the system has made the changes by checking the employee's Job Data, Job Information page. The system inserts a new data row with the same effective date as the one that you inserted on the Position Data, Position Location page.

Deleting Rows

Let's say you've inserted a data row and now realize that you have inserted it for the wrong position; for example, you wanted to change information on Position 14 instead of Position 15. You can easily delete the row that you've just created.

So that the system maintains incumbent job data when you make row deletes, make sure that you're changing the following options:

- A current or future effective-dated position row.
- A position data row that has a matching job row (same effective date, created from the Position Data component) in the Job Data component.
- The matching job row in the Job Data pages is also current or future dated.

Remember that you use the Correction action for current rows and the Update/Display action for future effective-dated rows.

To delete a row do the following steps:

1. Open Position Data - Description.
2. To delete the incorrect information, position the cursor in the Effective Date field for the row that you want to delete and click the Delete button.

   Remember that if any job data rows exist that have an effective date *after* the row that you're deleting, you must update them manually.
3. Save the changes that you have made to the position.
4. You can now make changes to the correct position.

Making Corrections

What if you've just saved a new data row, and you discover that you entered the wrong information in one of the fields that you changed? You don't want to insert a new row to correct the mistake, nor do you want to delete the row because it's essentially correct. To solve this problem, use the Correction action to fix the data but keep the row intact.

Two situations exist in which the system will automatically cross-update incumbent job data.

First, the system cross-updates data when you're making corrections, provided that the following options are present:

- You're correcting a current or future effective-dated position row. Note that you can't change the Effective Date.
- The position data row has a matching job row (same effective date, created from the Position Data pages) in the Job Data pages.
- The matching job data row in the Job Data Pages is also current or future.

- The Position Override check box on the Job Data - Work Location page is clear.

Second, it incorporates corrections to incumbent job data when the *current* incumbent data row is populated as follows:

- Has an Action of Hire, Rehire, Transfer, Promotion, or Position Change.
- Doesn’t have a matching position data row.

If future incumbent data rows exist, they won’t get updated. You have to update them manually.

When You Don’t Want to Update Job Data

For typical position data changes, you save time if the system cross-updates information for you. But what happens if you don’t want the system to make changes automatically? For example, you change a position from *Temporary* to *Regular* for the current incumbent, but the change doesn’t normally apply to this position, and you don’t want the system to write over your exceptions.

You can prevent automatic job data maintenance by completing either of these two tasks:

- Selecting the Position Data Override check box in the incumbent Job Data - Work Location page.
- Clearing the Update Incumbents check box in Position Data - Specific Information page.

You can select or clear both these check boxes whenever you need to. Furthermore, whenever you set them to the settings for cross-updating to take place, the system will begin updating the records automatically again. This is particularly useful if you entered some exceptions for a short period of time, but they no longer apply.

Whenever you have set the check boxes so that maintaining job data won't occur, check and update the affected data rows manually. When you save your changes in the Position Data pages and job data updating won't occur, the system will issue a warning message.

Selecting the Position Data Override Check Box in Incumbent Job Data, Work Location

When you have exceptions to default position data, they usually apply only to the current incumbent. You use the Position Data Override check box generally to enter exceptions and ensure that the system doesn't automatically insert changes that you make to default position data. The Position Data Override check box is on the Job Data - Work Location page.

Clearing the Update Incumbents Check Box in Position Data, Information

This check box is set to *selected* by default for every new data row that you enter. You won’t clear the check box very often because when you want to make sure the system doesn’t overwrite exceptions to position data, you usually select the Position Override check box. However, if you forget, for example, to select the Position Override check box, or you’re making corrections to historical data and need to update data manually in both the Position

Data and Job Data pages, you clear this check box. The Update Incumbents check box is located on the Position Data - Specific Information page.

Verifying Position Data

As you update data in fields that match in the Position Data and incumbent Job Data pages, periodically you should check the data to ensure the system contains the right information in both places. You can run an SQR audit, the Exception/Override report, to determine any data that doesn't match in the two components. You can choose between getting incumbent job data where you have prevented automatic cross-updating from occurring or only those exceptions where the data is out of sync for other reasons.

C H A P T E R 5

Maximizing Position Data

This chapter provides an overview of maximizing your position data and discusses how to:

- Create departmental budgets.
- View budget summary information.
- View vacant budgeted position information.
- Review position summary information.
- View position history.
- Create job requisitions.
- Maintain your organization structure.
- Use Manage Positions nVision reports.

Understanding How to Maximize Position Data

The information you use to maintain and track positions can help in organizational planning, budgeting, recruitment, and career planning. With the Manage Positions module, you can choose to manage budget information at various levels within a department. You can set up reporting relationships to create an organizational hierarchy. You can enter data on proposed, approved, or frozen positions. You can enter requested and approved budget amounts, and even enter year-to-date adjustments to approved budgets. To help in organizational planning, you can view reporting relationships among positions. And finally, to help plan your organization's future, you can see position, incumbent, and budgeting data from the past and present.

Common Elements Used in This Chapter

Max Head Count (maximum head count)	Displays the maximum head count defined for this position.
Actual Head Count	Displays the actual number of employees assigned to this position.
Position	Displays the position number and title of the position.

Reports To	Displays the number and title of the position this position reports to as of that effective date.
Job Code	Displays the job code associated with the position and a short description of the job code.
Rate Code Group	Displays a rate code group for this rate code.
Location	Displays the location this position is associated with as of that effective date.

Creating Departmental Budgets

When you structure the system by position, you can create budgets that include partial year estimates for positions, such as mid-year retirements, and you can accurately track budgeted and approved head counts and salaries within departments. Your budgets can be for any time period that you designate, such as for fiscal or calendar years, or for quarters.

You set up budgets on a department-by-department basis. You don't have to create budgets for every department in your organization. Select the departments for which you find the budgeting feature the most effective.

You can establish budgets at several levels: by department, job code, or position. Examples in this section show budgeting at the position level, because it provides the most detail and takes full advantage of the budgeting pages. However, you can use this page for budgeting by job code or by department.

To create a departmental budget by position, you must set the budget level to Position Number in the Department Table.

In this section, we discuss how to:

- Establish department, job code, or position budgets.
- View details about a department's budget.

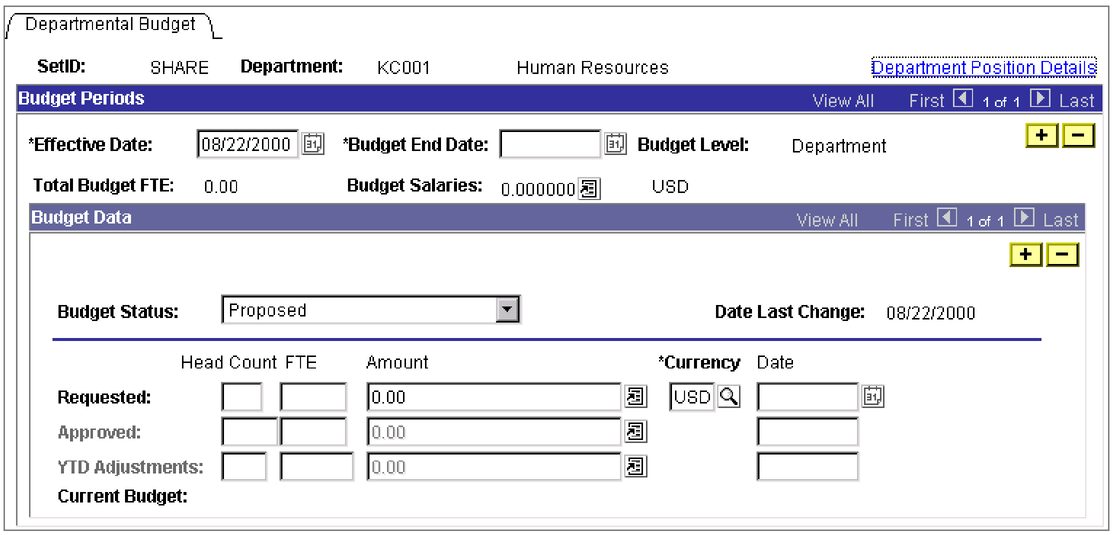
Pages Used to Create Departmental Budgets

Page Name	***Object Name***	***Navigation***	***Usage***
Departmental Budget	POSN_BUDGET_DATA	Develop Workforce, Manage Positions, Use, Departmental Budget, Departmental Budget Develop Workforce, Manage Positions (USF), Use, Departmental Budget, Departmental Budget	Establish department, job code, or position budgets.

Page Name	***Object Name***	***Navigation***	***Usage***
Department Position Details	DEPT_BUD_DATA_DTL	Click Department Position Details on the Department Budget page.	View details about the department.

Establishing Department, Job Code, or Position Budgets

Access the Departmental Budget page.



Departmental Budget page

Department Position Details — Click this link to access the Department Position Details page, which displays information about this department.

Budget Periods

Total Budget FTE (total budget of full time equivalents) — Displays the total number of FTE budgeted for all positions in this department.

Budget End Date — Enter the date the budget ends.

Budget Salaries — Displays the total budget salaries for all positions in this department.

Budget Level — Displays the budget level that you specified on the Department Table.

Budget Data

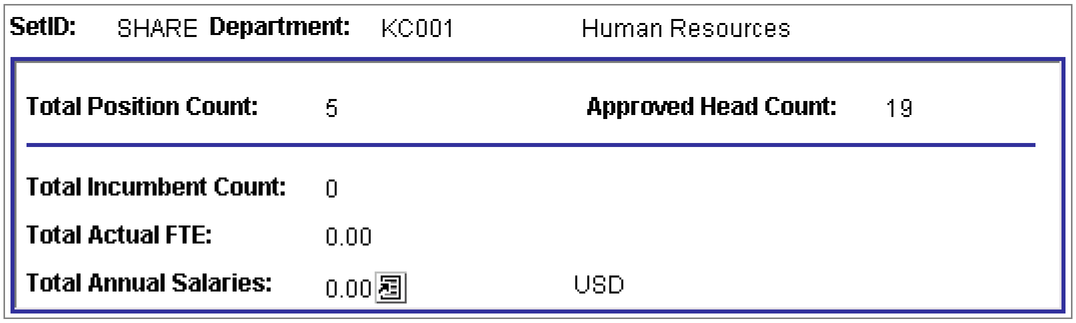
Position Number or **Job Code** — If you're budgeting by position, select a position number from the list. The system prompts you with positions in this department only.

	If you're budgeting by job code, select a job code from the list of job codes associated with this department.
Position Status	Displays the position's status.
Budget Status	Select the budget status. ***Proposed:*** This is the default value. Selecting this causes the fields in the **Approved** and **YTD Adjustments** lines to be unavailable for entry. ***Approved:*** The system copies the **Requested** figures to the **Approved** line and this becomes available for data entry so that you can enter the actual amounts, if different. ***Frozen:*** Only the **Requested** amount line will remain available for you to enter data.
Date Last Change	Every time you modify information in this page, the system updates this field with the system date.
Requested	Enter the requested **Head Count, FTE, Amount, Currency** code, and request **Date** for the budget. If you selected ***Approved*** in the **Budget Status** field, these fields are unavailable for entry. **Note.** Select a currency code if you're using a currency for this departmental budget that's different from the base currency specified in the Installation Table.
Approved	Enter the approved **Head Count, FTE, Amount, Currency** code, and approval **Date,** if different from the values that appear by default from the **Requested** line.
YTD Adjustments (year-to-date adjustments)	Use this line to enter any adjustments made to the **Head Count, FTE, Amount, Currency** code, and approval **Date** values after the budget was approved.
Current Budget	The system calculates the **Current Budget Head Count, FTE,** and **Amount** totals using the values in the **Approved** line, plus or minus the adjustments entered in the **YTD Adjustments** line.

Once you've entered and saved a departmental budget, the system displays the total salaries and total budgeted FTEs. The total salary amounts appear in the currency specified in the Primary Permission List Preferences Table.

Viewing Details About the Department's Budget

Access the Departmental Budget - Department Position Details page.



Departmental Budget - Department Position Details page

Total Position Count	Displays the total number of approved budgeted positions.
Approved Head Count	Displays the total maximum headcount of all the approved, budgeted positions.
Total Incumbent Count	Displays the number of employees currently holding positions in this department.
Total FTE	Displays the FTE total of this department.
Total Annual Salaries	Displays the sum of all annualized salaries in this department converted to the user's preferred currency as defined on the Primary Permission List Preferences page.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, ”Setting Up PeopleSoft HRMS“

PeopleSoft Human Resources PeopleBook: Manage Commitment Accounting, “Defining Fiscal Year Budgets”

Viewing Budget Summary Information

When you're planning next year’s budget, you can retrieve information from previous planning sessions. However, you may want a more condensed view of the information than what you can get from the individual pages. You need summaries of what is happening (or has happened) with positions or departmental budgets. PeopleSoft Human Resources offers you some quick ways to review this data. You can access pages containing prior and current budget data to help prepare for the next round of budgeting.

When you maintain a departmental budget at the position level, use the Position Budget Status summary to see any differences between budgeted and actual figures for departments. If there is more than one incumbent, you can scroll through their compensation-related data. The summary displays all the figures while the budget period is still open.

When you budget for a department at the department or job code level, you see only actual figures displayed on the page.

In this section, we discuss how to:

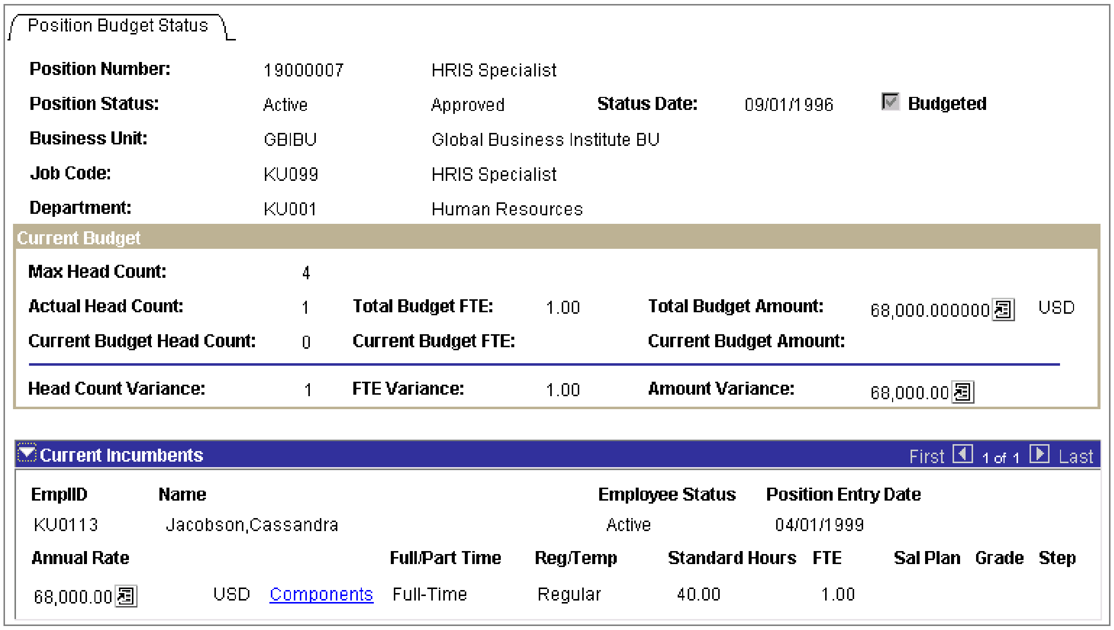
- View a summary of a department's budgeted and actual figures.
- Review detailed salary information.
- Display comp rate code information.

Pages Used to View Budget Summary Information

Page Name	*Object Name*	*Navigation*	*Usage*
Position Budget Status	POSN_BUDGET_STATUS	Develop Workforce, Manage Positions, Inquire, Position Budget Status, Position Budget Status Develop Workforce, Manage Positions (USF), Inquire, Position Budget Status, Position Budget Status	View a summary of budgeted and actual figures for departments.
Salary Components	COMP_POSN_BUDG_SEC	Click the Components link on the Position Budget Status page for the employee whose salary information that you want to view.	Review detailed salary information about the position incumbents at the position entry date and the position end dates.
Comp Rate Code	COMP_RATECD5_SEC	Click the Details link on the Salary Components page.	Display comp rate code information.

Viewing Summary of Budgeted and Actual Figures for Departments

Access the Position Budget Status page.



Position Budget Status page

Current Budget

Current Budget Head Count Displays the current budgeted head count for this position. Head count budgets are defined on the Departmental Budget page.

Head Count Variance Displays the difference between the **Actual Head Count** and the **Current Budget Head Count** values.

Total Budget FTE Displays the total budgeted FTE for this position. This information is specified on the Position Data - Specific Data page.

Current Budget FTE Displays the current budgeted FTEs for this position. FTE budgets are defined on the Departmental Budget page.

FTE Variance Displays the difference between the **Total Budget FTE** and the **Current Budget FTE** values.

Total Budget Amount Displays the total salary amount for the incumbents assigned to this position.

Current Budget Amount Displays the current budgeted salary amount for incumbents assigned to this position.

Amount Variance Displays the difference between the **Total Budget Amount** and the **Current Budget Amount** values.

Note. Salaries appear in the currency that you designated when creating the budget. If the currency differs from the base currency specified in the Installation Table, a converted amount appears at the top of the screen. **Note.** If the actual figures are over budget, the variances are *positive* numbers. If the actual figures are under budget, they appear as *negative* amounts. And if the actual and budget amounts match, no figure appears in the variance fields.

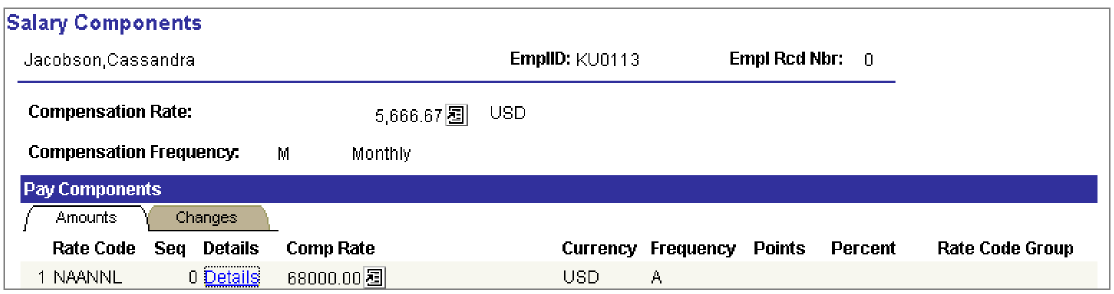
Current Incumbents

This group box contains information on the current incumbent, or incumbents. If more than one incumbent is assigned to this position (when the position has job-sharing), you can scroll through the data. Incumbent data is stored on the Job Data component.

Components Click this link to view the Salary Components page.

Reviewing Detailed Salary Information

Access the Position Budget Status - Salary Components page.



Position Budget Status - Salary Components: Amounts tab

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields that are common to all views first.

Common Page Information

Compensation Rate Displays the position incumbent's compensation rate.

Compensation Frequency Displays the position incumbent's compensation frequency.

Amounts Tab

See the previous exhibit for a view of this tab.

Rate Code Displays a rate code. Rate codes are IDs for pay components. The system displays any compensation information associated with this rate code in the compensation grid.

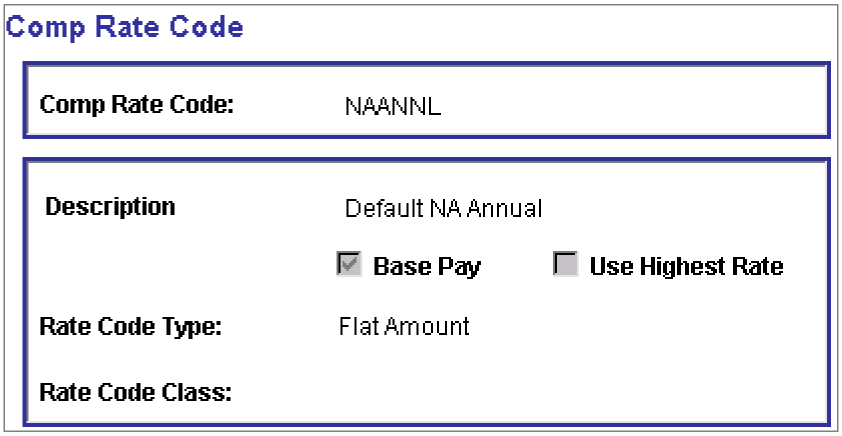
Seq (sequence)	Displays a number indicating multiple use of the same rate code if it is used more than once.
Details	Click this link to open the Comp Rate Code page where you can review the description, rate code type, and rate code class associated with the rate code.
Comp Rate (compensation rate)	Displays the position incumbent's annual compensation rate.
Frequency	Displays the frequency over which the payee is paid the compensation rate.
Points	Displays the salary points associated with this rate code, if any.
Percent	If the rate type for this rate code is ***Percent,*** the system displays the percent to be applied to the job compensation rate or to a rate code group if you're using rate code groups.

Changes Tab

Change Amount	Displays the overall change amount in this pay component rate.
Change Points	Displays the overall change amount (in points) for this pay component. This field is visible only if Salary Points is selected on the Installation Table page.
Change Percent	Displays the overall change amount for this pay component. This field isn't applicable to rate codes that have a rate code type of Percent or Points.
Apply FTE	If this check box is selected, the value associated with the rate code has been selected to be multiplied by the FTE factor for annualization and deannualization. FTE is the percent of full time the employee should normally work in the corresponding job. This field isn't applicable for rate codes of type Percent.
Converted Comp Rate (converted compensation rate)	Displays the converted compensation rate for this pay component. The system converts all base pay components to the currency and compensation frequency that you specify.

Displaying Comp Rate Code Information

Access the Comp Rate Code page.



Comp Rate Code page

Base Pay Indicates if this comp rate code is included in the job compensation rate calculation.

Use Highest Rate Indicates if payroll should use the highest rate of pay for this comp rate code.

Rate Code Type Displays one of the following compensation rate types:

Flat Amount: Identifies a flat (or fixed) amount.

Hourly Rate + Flat Amount: Identifies a flat amount additionally paid per hour. This type can't be a base pay component.

Hourly Rate: Identifies an hourly rate of pay.

Percent: Identifies a percentage assignment for this rate code.

Points: Identifies salary points paid for a job. The point's monetary value is set up on the Company Table.

Rate Code Class Displays the rate code class associated with this comp rate code.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Working With Multiple Components of Pay”

Viewing Vacant Budgeted Position Information

Use the Vacant Budgeted Positions component to view a list of all positions currently open in a department, and the attendant position information. This information can help you plan recruitment activities and costs.

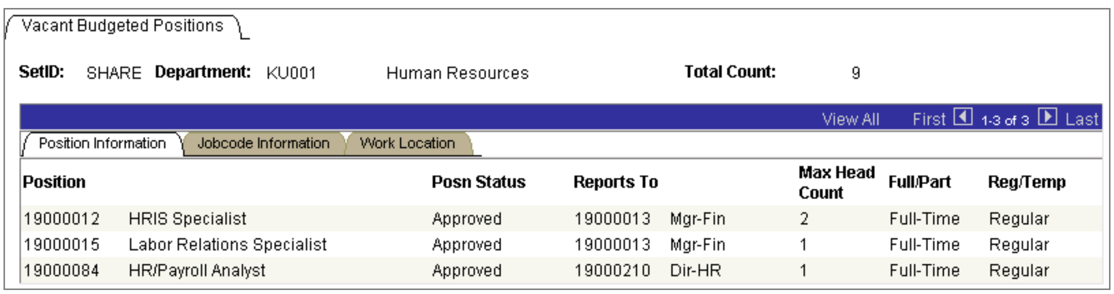
This section describes how to display department vacant position information.

Page Used to View Vacant Budgeted Position Information

Page Name	***Object Name***	***Navigation***	***Usage***
Vacant Budgeted Position	POSN_BUDGET_VACANT	Develop Workforce, Manage Positions, Inquire, Vacant Budgeted Positions, Vacant Budgeted Positions Develop Workforce, Manage Positions (USF), Inquire, Vacant Budgeted Positions, Vacant Budgeted Positions	Displays position information about the positions currently vacant in the department.

Displaying Department Vacant Position Information

Access the Vacant Budgeted Position page.



Position		Posn Status	Reports To		Max Head Count	Full/Part	Reg/Temp
19000012	HRIS Specialist	Approved	19000013	Mgr-Fin	2	Full-Time	Regular
19000015	Labor Relations Specialist	Approved	19000013	Mgr-Fin	1	Full-Time	Regular
19000084	HR/Payroll Analyst	Approved	19000210	Dir-HR	1	Full-Time	Regular

Vacant Budgeted Positions page: Position Information tab

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields that are common to all views first.

Common Page Information

Total Count	Displays the total number of vacancies in the department.

Position Information Tab

Posn Status (position status)	Displays the status (for example ***Approved*** or ***Frozen***) of any vacant, budgeted position.
Full/Part (full-time or part-time)	Displays if the vacant position is ***Full-Time*** or ***Part-Time.***
Reg/Temp (regular or temporary)	Displays if the vacant position is ***Regular*** or ***Temporary.***

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Appendix: PeopleSoft Application Fundamentals for HRMS Reports," POS007 - Vacant Position and POS001 - Position Status.

Reviewing Position Summary Information

When reviewing your organizational structure, you can retrieve information from prior planning sessions. But if you want a more high-level view of the information than what you can get from the individual pages you need summaries of what is happening (or has happened) with positions and incumbents.

PeopleSoft Human Resources provides some quick ways to review this data. Manage Positions provides display-only pages containing historical information on positions and the incumbents who have filled them.

Use the Position Data Summary component to get an overview of a position's current and historical data. You can see a list of all actions, such as department moves or title changes, which have occurred.

In this section, we discuss how to:

- View position summary (general historical information about a position).
- View position history (incumbent information).
- View current position information.
- View detailed salary information.

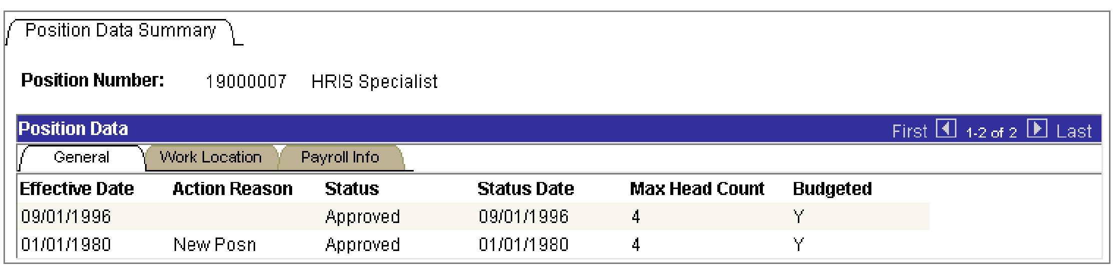
Pages Used to Review Position Summary Information

Page Name	*Object Name*	*Navigation*	*Usage*
Position Data Summary	POSITION_SUMMARY	Develop Workforce, Manage Positions, Inquire, Position Data Summary, Position Data Summary Develop Workforce, Manage Positions (USF), Inquire, Position Data Summary, Position Data Summary	View general current and historical information about a position.

Page Name	***Object Name***	***Navigation***	***Usage***
Position History	POSITION_HISTORY	Develop Workforce, Manage Positions, Inquire, Position History, Position History Develop Workforce, Manage Positions (USF), Inquire, Position History, Position History	See information on incumbents currently and previously assigned to a position.
Current Position Data	CURRENT_POSN_DATA	Click the Current Position Data button on the Position History page.	View current position details.
Salary Components	COMP_POSN_HIST_SEC	Click the Components button on the Position History page for the employee whose salary information that you want to view.	Review detailed salary information about the position incumbents at the position entry date or the position end dates.

Viewing General Current and Historical Information About a Position

Access the Position Data Summary page.



Position Data Summary page: General tab

Note. Multiple views of this page are available by selecting the tabs in the scroll area.

General Tab

Action Reason Displays the action and reason for changes to the position as of that effective date.

Status Date	Displays the date the position first had that status. For example, if a position has a status of ***Active*** at its most recent position change, effective 01/04/1998 and the position's status was last changed to ***Active*** 01/01/1996, the status date for the position change effective 01/04/1998 is 01/01/1996.
Budgeted	Indicates if the position is budgeted (***Y***) or not (***N***).

Work Location Tab

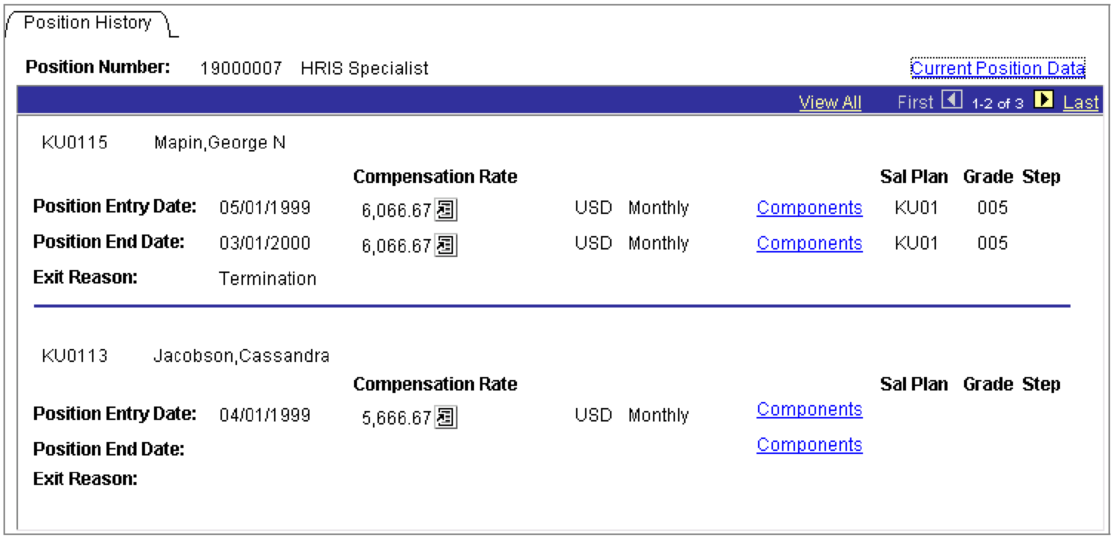
Reports To	Displays the number and title of the position this position reports to as of that effective date.
Jobcode	Displays the jobcode this position is assigned to as of that effective date.

Payroll Info Tab

Reg/Temp (regular or temporary)	Displays if the position is regular or temporary as of that effective date.
Full/Part (full-time or part-time)	Displays if the position is ***Full-Time*** or ***Part-Time*** as of that effective date.
Default Hr (default hours)	Displays the position's default hours as of that effective date.
Work Period	Displays the position's standard work period as of that effective date. The standard work period is the time period in which employees must complete the standard hours. Valid values are stored on the Frequency Table.
Shift	Displays the shift information as of that effective date**,** if applicable.

Viewing Position History

Access the Position History page



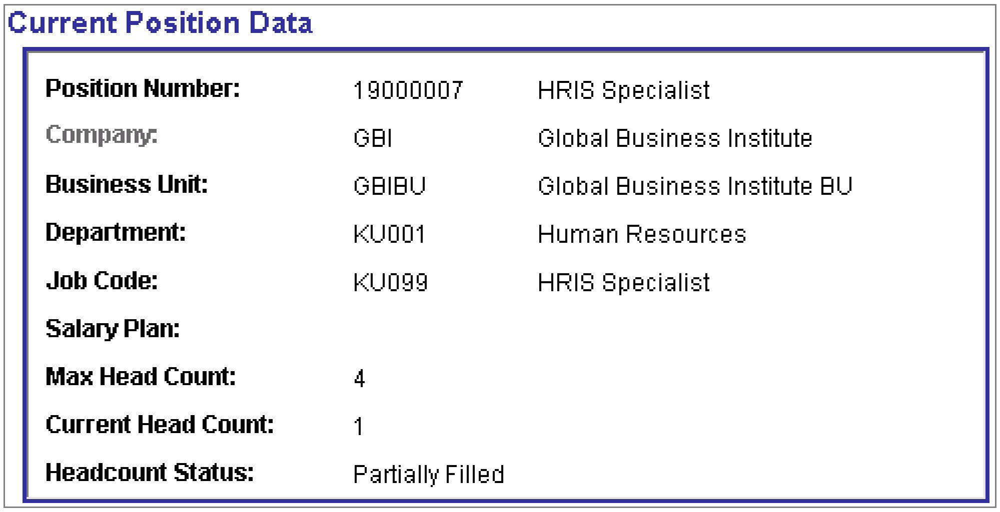
Position History page

You'll see incumbent salary information, which you can use for budgeting and to anticipate the approximate salary a new incumbent will receive. And by examining the exit reasons, you can explore ways to reduce incumbent turnover in a position.

Current Position Data	Click this link to access the Current Position Data page.
Position Entry Date and **Position End Date**	Displays the date the employee was assigned to the position and exited the position.
Compensation Rate	Displays the compensation amount, currency, and frequency that were associated with the position at the incumbent's position entry and end dates.
Components	Click this link to access the Salary Components page. You can view the salary components information that was associated with the position at the incumbent's position begin and end dates by clicking **Components** in either the **Position Entry Date** or **Position End Date** rows.
Sal Plan (salary plan)	This column displays the salary plan that was associated with the position at the incumbent's position entry and end dates.
Grade	This column displays the salary grade that was associated with the position at the incumbent's position entry and end dates.
Step	This column displays the salary step that was associated with the position at the incumbent's position entry and end dates.

Viewing Current Position Information

Access the Position History - Current Position Data page.



Position History - Current Position Data page

Salary Plan	Displays the position's salary plan.
Current Head Count	Displays the current head count assigned to this position.
Headcount Status	Displays the head count status for this position.

Viewing Salary Components Information

The Salary Components page that you access from the Position History page is identical to the Salary Components page that you access from the Position Budget Status page.

See Also

Reviewing Detailed Salary Information

Creating Job Requisitions

Use the Manage Positions module to create requisitions for vacant positions. The Create Job Requisitions process selects all current vacant positions in a company and creates a job requisition for each one.

(USF) Note. Federal users don't use this process.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, ”Appendix: PeopleSoft Application Fundamentals for HRMS Reports“

Maintaining Your Organizational Structure

With the Manage Positions business process, you can create reporting relationships among positions, showing how they look in hierarchical form. Use this information, either through a report or online, for organizational planning.

PeopleSoft Human Resources provides two ways to see positions in hierarchical form:

- By entering supervisory position numbers in the Reports To Posn (position) field in the Position Data - Description page, you can generate reports that show position hierarchies.
- If you want to see part of your organization chart online, use PeopleSoft Tree Manager to create a position tree, which illustrates position hierarchies.

In this section, we discuss how to:

- Establish position hierarchies.
- Run the Organizational Structure Structured Query Report (SQR).
- Maintaining position hierarchies in PeopleSoft Tree Manager.

Establishing Position Hierarchies

You can establish hierarchical information for your entire organization in the Position Data pages by establishing reporting relationships among positions. Assign positions to one another directly, indirectly, or both, where applicable.

Here's how to set up position hierarchies:

1. Open the Position Data - Description page.
2. Establish direct and or indirect (dotted-line) reporting relationships.
   a. To establish direct reporting relationships, enter the supervisor's position number in the Reports To Posn (Position) field on the Position Data, Description page for each position that you create.
   b. To establish indirect reporting relationships, select a position number in the Dotted-Line Rpt (report) field on the Position Data - Description page.
3. Save your changes.

Establishing Direct Reporting Relationships

This data links positions to one another, and establishes reporting relationships among positions. Viewing position hierarchies are especially useful for budgeting and organizational planning.

When Position Management is set to Partial in the Installation Table and the Reports to Position field contains a value in Position Data, the system hides the Supervisor ID in the incumbent Job Data. Otherwise, both fields appear in Job Data until you enter a value in one or the other.

Currently, if you save a position without selecting a position number in the Reports To Posn field, the system issues a warning message. You don't have to enter a position number after you acknowledge the message. But if you want to require this field for all positions, change the warning message to an error message. The system won't enable you to save the data without an entry in this field.

Establishing Indirect Reporting Relationships

You can enter this data for employees who officially report to one position, while on a functional basis they also work for another position.

For example, Joe Conrad, a computer technician, officially reports to the Plant Manager in Milwaukee, but functionally he works for the Computer Services Manager in the head office. Enter the Computer Services Manager position number in the Dotted-Line Rpt field to reflect this situation.

Running the Organizational Structure Structured Query Report (SQR)

Once you enter all the reporting relationships among positions, run an SQR, POS006A, which links the positions in the system and creates an organizational hierarchy. Run this utility at the following times:

- When you first enter the reporting relationships.
- Any time that you add new positions.
- When you change reporting relationships among existing positions.

When you select Reports To Position codes in all the positions that you want to track, you can generate a report listing the relationships in an indented organizational chart format, the Indented Position Reporting Chart (POS006).

Maintaining Position Hierarchies in PeopleSoft Tree Manager

Note. Review the PeopleSoft Tree Manager documentation for a full, detailed discussion about PeopleSoft Tree Manager before you attempt to modify or create Position Trees. This section discusses using PeopleSoft Tree Manager to define and maintain Position Trees in PeopleSoft Human Resources and is by no means an exhaustive discussion about the use of the Tree Manager.

If you want to represent a portion of your organizational structure graphically, create position hierarchies in PeopleSoft Tree Manager. It enables you to view all the positions in hierarchical order at the levels that you designate, such as the top five levels of management. This is useful for *what-if* scenarios in organizational planning. For planning at the department level, create a position tree with only the positions in a particular department.

Within PeopleSoft Tree Manager you can also view incumbent and position data in the context of the department or other part of the organization you're viewing. To do so, click a position number to display the Position Data pages.

Note. PeopleSoft recommends that you use the Tree Manager for position trees only if your company is small or, if your organization is large, you plan to only represent a few levels of management. You can also create separate position trees that incorporate small portions of your organization. Otherwise, generate the report, POS006, to manage and view your reporting hierarchies.

Building Position Trees

How to create a new position tree is described in the PeopleSoft Tree Manager documentation. Enter the following data in the Tree Definition and Properties page to create a position tree:

Field	***To define a Position tree:***
Tree Name	Enter a name to help you identify this tree.
Structure ID	Select *Position*. PeopleSoft delivers the system with this Structure ID set up.
Description	Enter a description of the tree.
Effective Date	Enter the date the tree becomes effective.
Status	Select the status of the tree.
Category	Select the category of the tree.
Use of Levels	Select *Strictly Enforced* if your levels consist of only one type of entity. For example, only Regions report to the Company level, and only Divisions report to Regions. Select *Loosely Enforced* if the entities combine different types of entities. For example, both Regions and Divisions report to the Company level. Select *Not Used* if your security structure is very flat and you don't need to set up groupings of units in levels.
All Detail Values in this Tree	Leave this blank.
Allow Duplicate Detail Values	Leave this blank.

Inserting Nodes

Once you've created the basic tree structure, add the nodes. In a position tree, each node represents a position, defined on the Position Data table. The first node is known as the root node, and is the highest level in the hierarchy or reporting structure.

See Also

PeopleTools PeopleBook: Tree Manager

Using Manage Positions nVision Reports

Filled/Approved Positions By Department is an nVision report that supports the Manage Positions business process in your PeopleSoft Human Resources system. Use this report to review and analyze the number of approved, filled, and budgeted positions in the Departments within a Business Unit.

Note. This report doesn't apply to PeopleSoft HRMS for Education and Government users.

For each department within a business unit, the report shows the total Approved Headcount, the Actual Headcount, and the number of Budgeted Positions. The report also shows combined Position Totals for all departments within the business unit.

You can also use the scroll bar to see additional detailed approved head count and actual head count information for each of the departments within the business unit. There are two separate reports; one for approved head count details and one for actual head count details.

Note. Using the scroll bar only works when you double-click at the intersection of an amount row and column. Before using the scroll bar, you must first select an individual cell at the intersection of an amount row and column.

Viewing Status Information for Approved Head Count in a Department

Cells in the Approved Head Count and Budgeted Positions columns on Sheet 1 of this report all go to this same page. Use this page to review and analyze detailed status information for individual Approved Head Count within a Department.

Viewing Status Information for Actual Headcount in a Department

Cells in the Actual Head Count column on Sheet 1 of this report all go to this same page. Use this page to review and analyze detailed status information for individual Actual Headcount within a Department.

See Also

PeopleTools PeopleBook: nVision

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