PeopleSoft 8.00.01 Human Resources PeopleBook

Managing Positions

PeopleSoft 8.00.01 Human Resources PeopleBook: Managing Positions

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Managing Positions

This book provides you with the information you will need for implementing and using the Managing Positions module of PeopleSoft Human Resources. You can order the online version by requesting SKU HRB8SP1R0, or the hardcopy version by requesting SKU MAHRAr8SP1B 1200.

Position Management Overview provides a brief overview of the functionality offered by the Position Management application and the advantages and disadvantages of using it.

Setting Up Positions outlines the steps involved in adding a new position, such as assigning organizational and employment data to a position.

Managing Position Data gives you detailed information on how to update position data and ensure that the system automatically maintains incumbent job data for positions with employees assigned to them.

Maximizing Position Data shows you ways you can use position data in several functions of PeopleSoft Human Resources, including position budgeting, organizational planning, and career planning.

Running Position Management Reports lists the various reports you can run to gather information about your organization's positions.

CHAPTER 1

Position Management Overview

PeopleSoft Human Resources gives you the option of driving your human resources system by position instead of by employee. What's the advantage? By focusing on the position itself, you can track information related to the position, such as specific phone number or mail stop, regardless of whether an employee holds the position. That way when the position is vacant you won't lose the common thread that binds the data together.

Using Positions Versus Job Codes to Drive HR

When you drive your HR system by employee, you get broader information on jobs in your organization. You use job codes to group jobs into general classifications so job codes and employees have a one-to-many relationship. Many employees share the same job code, though they might perform the work in different departments, locations, or companies. You identify the job an employee performs through the data you enter in their employee record.

You use positions to track details on a particular job in a particular department or location, and they usually have a one-to-one relationship with employees. When you drive your system by position, you attach data to the positions and move employees in and out of those positions. You track specific information related to a position, such as salary or standard hours, regardless of whether an employee fills it. And you'll use data specific to each position as the basis for organizational planning, recruitment, career planning, and budgeting.

When To Use Position Management

If your organization is fluid-you tend to look at broader groupings of employees and often create new jobs-you'll probably find that driving the system by employee is best for you. This method is useful if your organization is ever expanding, or if you often have new projects requiring you to create new jobs or job types regularly.

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

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

Advantages of using PeopleSoft Position Management 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 Position Management include:

- Additional data set up and data maintenance.

C H A P T E R 2

Setting Up Positions

If jobs and their scope change less often than the employees filling them in your organization, PeopleSoft Human Resources offers you the option of structuring human resource data by position. With the Manage Positions Business Process, you can attach detailed information, such as job title, phone number, and mail stop, to positions in your company, and track the data regardless of whether employees fill those positions.

You might want to track only certain positions, such as the top five management levels, instead of tracking all positions in your organization. With PeopleSoft Human Resources, you can track as many—or as few—positions as you need to.

If you choose to drive part or all of the system by position, you'll need to enable Position Management, which you do on the Installation Table. After doing that and setting up other fundamental tables in PeopleSoft Human Resources which is discussed below, you can begin to establish your organization's positions.

Before You Begin

The system draws on default general and job data in several tables to create position data. Before you start working with the pages described in this section, you *must* set up information in the Installation Table, Department Table, Company Table, Job Code Table, Location Table (USF Location Table), Pay Group Table (this doesn't apply to Federal users), and Union Table in PeopleSoft Human Resources. Federal users must also set up the Sub-Agency and POI Table control tables.

When you update position data, you'll use the same pages described in this section. But in this section we explain only how to add new positions. The system responds differently when you modify data, so we address the procedures for updating position data and incumbent job data in Managing Position Data.

The procedures for accessing and entering information in these tables mirror those for updating any PeopleSoft table or page.

Most of the manage positions tables are effective-dated, which means you can track changes you make to data chronologically. You won't lose any data history, because it's all there for you to review.

If you have implemented multiple business units and SetIDs in your 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.

For more information about how Business Unit/SetID functionality impacts your HRMS system and regulates control table and prompt table values, see Regulating HRMS System Data.

What's in a Position?

PeopleSoft Human Resources employs its integrated, table-driven design to help your organization keep an effective-dated history of all positions in your organization, regardless of whether they are filled. That way you can track your organizational reporting relationships independently of the employees in the positions.

When the system assigns position defaults, it draws on information stored in the system general tables. The system uses this same information when you drive 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 fill out the rest of the job data record.

The Elements of Position Data

The system takes advantage of data you've already entered in the Department Table and Job Code Table. When you create new positions, PeopleSoft Human Resources inserts the default values in several position data fields. This will save you data entry time and keep information consistent. You can still override the defaults whenever you need to enter exceptions for a particular position.

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

If your salary administration plans are tied to locations, the standard hours will default to the standard hours for the location as specified in the Salary Plan Table Page. If salary plans aren't tied to locations, the position's standard hours will default from the Job Code Table. However, if you later make changes to the value for the job code in either the Salary Administration Plan Table or the Job Code Table, the system doesn't cross-update the value in the Position Data component.

Updating Position Changes to the Job Data Component

Several fields in the Position Data component match fields in the Job Data component. When you make changes to information in the position data fields, the system will maintain 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 they are changed 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	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	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 Position Management aren't reflected in Job Data since any cross update would require a complete recalculation of the multiple components of pay package, which needs to be triggered from the Job Data component.

USF Updating Position Changes to the Position Incumbent's Job Record

Several fields in the Position Data component match fields in employee data records. When you make changes to information in the position data fields, the system will maintain 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 they are changed 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	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

Note on Modifying the Position Data Pages

If you decide to remove a field from Position Data 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 perform cross-updates to employee tables. Either way, before you begin making changes, you'll need to determine which new and old fields overlap employee tables and plan system modifications accordingly.

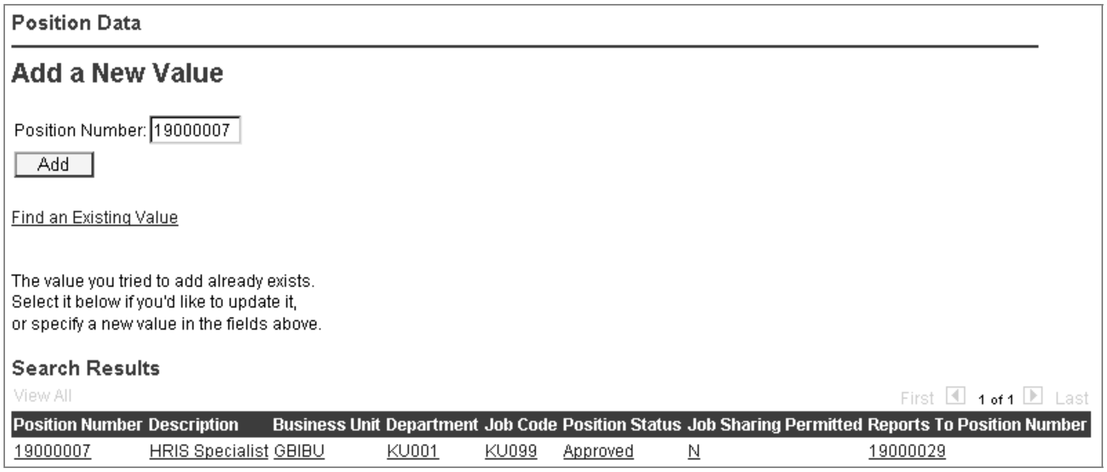
To add, modify, or remove fields from the Position Data component, contact your human resource project leader.

For more information about general, job, and employee data, see Setting Up Control Tables and Hiring Your Workforce, and Updating Workforce Information.

USF For more information about general, job, and employee data, see Setting Up Control Tables and Hiring Your Workforce, and USF Administering Personnel Action Requests, and USF Processing Personnel Action Requests.

Security Considerations When Using the Manage Positions Business Process

If you try to create a position (using the Add action) that already exists in PeopleSoft Human Resources, the system displays the following message informing you that a position already exists with that number and allowing you to access the existing record:


Position Data

Add a New Value

Position Number: 19000007

Add

Find an Existing Value

The value you tried to add already exists.
Select it below if you'd like to update it,
or specify a new value in the fields above.

Search Results

View All First 1 of 1 Last

Position Number	Description	Business Unit	Department	Job Code	Position Status	Job Sharing Permitted	Reports To Position Number
19000007	HRIS Specialist	GBIBU	KU001	KU099	Approved	N	19000029

If you select the position, the system will permit you to update the data on the existing position—even if it belongs to a department for which you don't have security access. There are several reasons for this. First, you won’t create duplicate positions in the system, so the system won't issue lower level SQL errors when you create new positions.

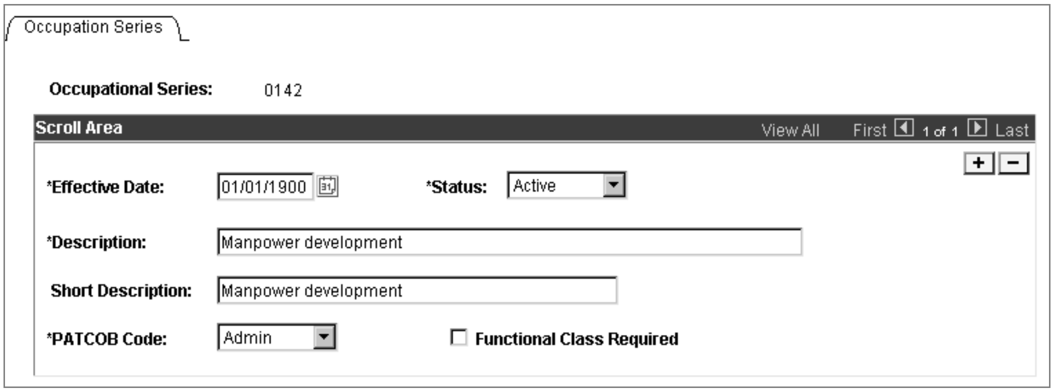
More importantly, the system is set up to enable you to make departmental transfers. For example, if a position is moving to your department from another department for which you aren't cleared for security access, you can still make the transfer by using the Add action—provided you know the exact position 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 probably less critical than being aware of a position’s existence in the system. If you would like to modify the system so that users can't see position data even briefly using the Add action, you can easily do so. In the Application Designer, open the POSITION_DATA component. Highlight the DESCR field and select PeopleCode, RowSelect. You’ll see instructions on uncommenting the code that restricts this situation. You’ll also need to change the search record for the Add action to POSITION_SRCH, which you do in the Application Designer as well.

For more information about modifying menus and data in PeopleSoft applications, see PeopleSoft Application Designer.

USF Occupation Series Page

Usage	Use the Occupation Series page to set up occupation series classifications.
Object Name	GVT_OCCUPATION_TBL
Navigation	**Develop Workforce, Manage Positions (USF), Setup, Occupation Series, Occupation Series**
Access Requirements	Enter an Occupational Series code in the search dialog box.



Occupation Series page

The following fields are common to multiple pages and are defined at the front of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date, Status, Description,** and **Short Description.**

Enter a **Description** and **Short Description** of the **Occupational Series**. These descriptions will be displayed next to the occupational series codes where they are used to help you identify the codes.

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.

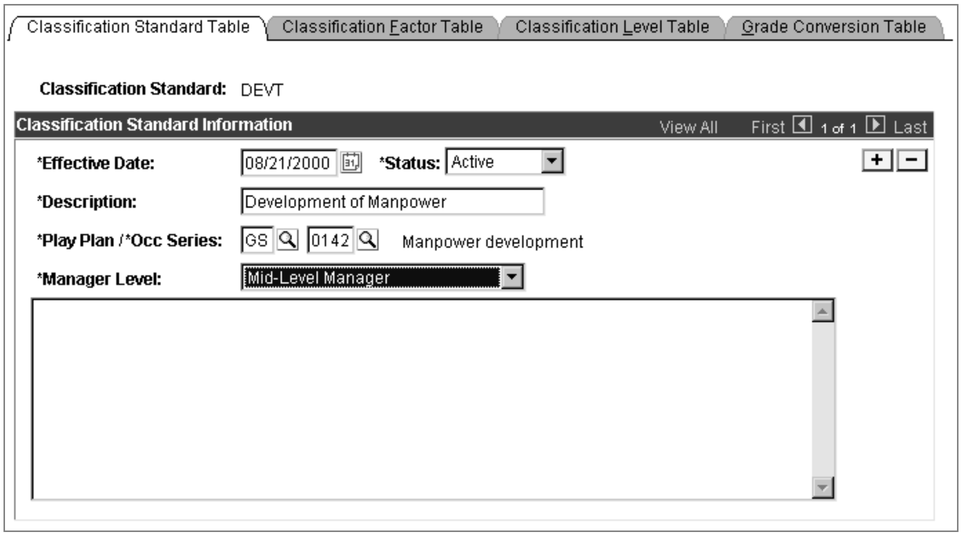
Functional Class Required
Select this check box if a functional class is required for the position.

USF Setting Up Classification Standards

Use the Classification Standards component to set up position classifications.

USF Classification Standard Table Page

Usage	Use the Classification Standard Table page to create classification standards by establishing a description and level for each type of classification.
Object Name	GVT_CLASS_STD_TBL
Navigation	**Develop Workforce, Manage Positions (USF), Setup, Classification Standards, Classification Standard Table**
Access Requirements	Enter a Classification Standard in the search dialog box.



Classification Standards - Classification Standards Table page

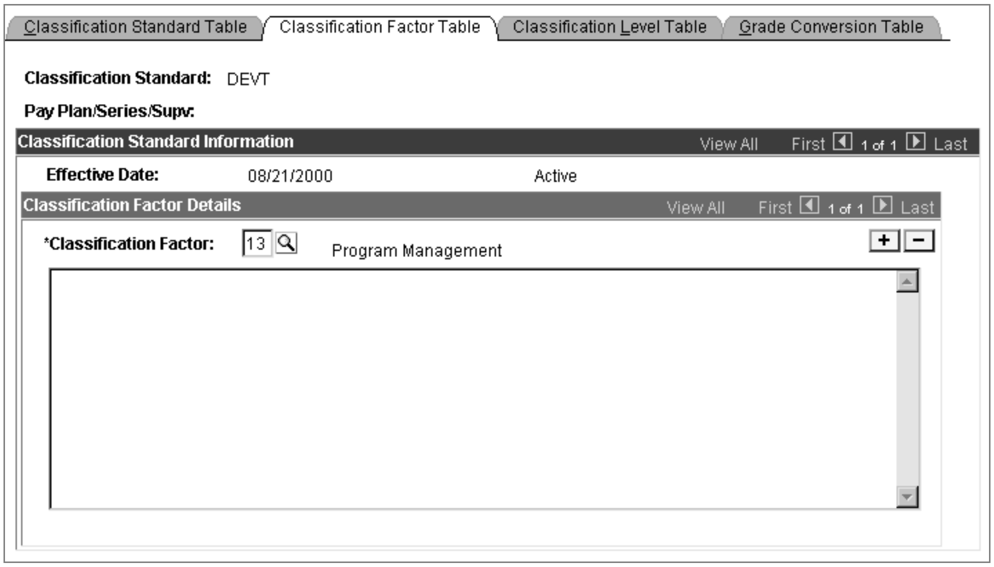
The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date, Status,** and **Description.**

Pay Plan / Occ Series (occupation series)	Select the occupation series you want to associate with the **Classification Standard** from the list of available options. The system will display the associated **Pay Plan.** Occupation series are maintained on the Occupation Series page.
Manager Level	Select a **Manager Level** you want to associate with the **Classification Standard** from the list of available options.

Enter any comments you want to associate with the **Classification Standard** in the space provided.

USF Classification Factor Table Page

Usage	Use the Classification Factor Table to designate Classification Standards' classification factors.
Object Name	GVT_CLASS_FCTR_TBL
Navigation	**Develop Workforce, Manage Positions (USF), Setup, Classification Standards, Classification Factor Table**
Prerequisites	Classification Standard Table
Access Requirements	Enter a Classification Standard in the search dialog box.



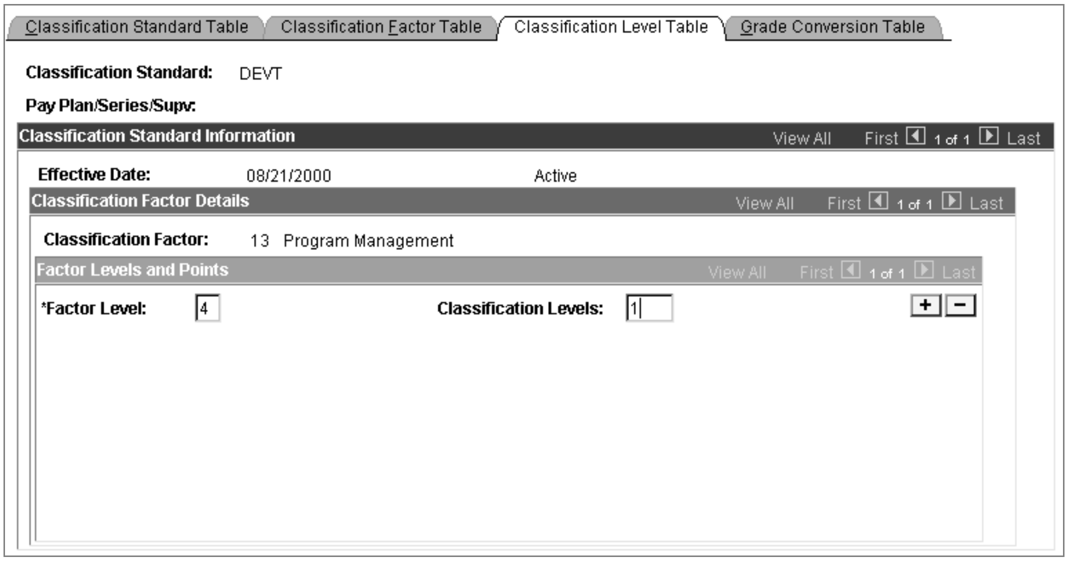
Classification Standards - Classification Factor Table page

Classification Factor	Select a **Classification Factor** 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.

Enter any comments you want to associate with the **Classification Factor** in the space provided. Depending on your agency's requirements, you may enter descriptions of the background and knowledge used for this factor, and the functions performed.

USF Classification Level Table Page

Usage	Use the Classification Level Table setup page to associate classification factor levels and points with classification factors.
Object Name	GVT_CLASS_LVL_TBL
Navigation	**Develop Workforce, Manage Positions (USF), Setup, Classification Standards, Classification Level Table**
Prerequisites	Classification Factor Table
Access Requirements	Enter a Classification Standard in the search dialog box.



Classification Standards - Classification Level Table page

Factor Level and Points

Factor Level

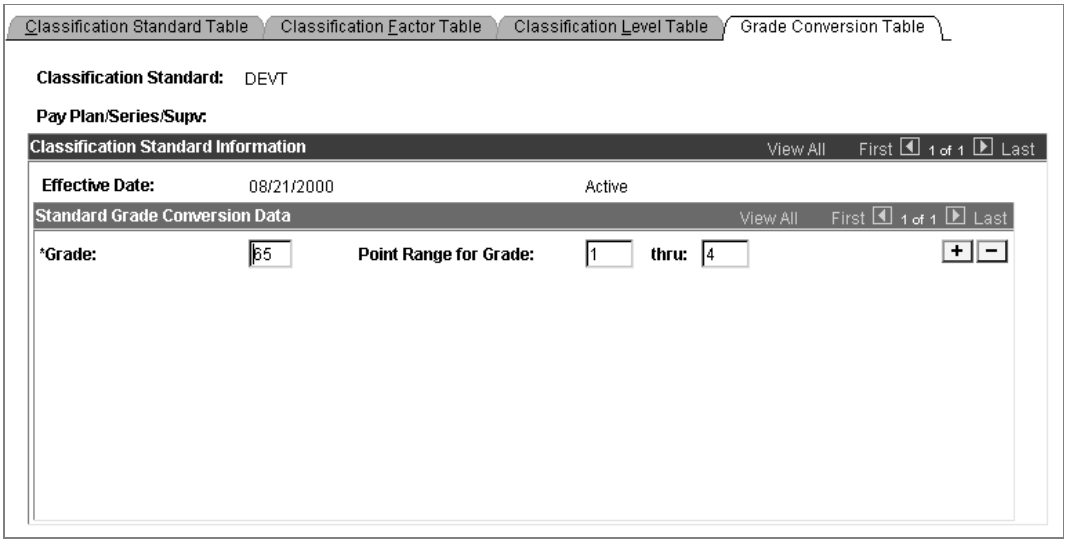
For each classification factor you specify, enter the applicable factor levels that are relevant to a specific occupation or category of work. You can assign multiple factor levels to a **Classification Factor** by inserting more rows.

Classification Levels

Assign the point values for each **Factor Level** in the **Classification Levels** column.

USF Grade Conversion Table Page

Usage	Use the Grade Conversion Table to enter a grade and point range for each grade
Object Name	GVT_CLASS_GRD_CNV
Navigation	**Develop Workforce, Manage Positions (USF), Setup, Classification Standards, Grade Conversion Table**
Prerequisites	Classification Factor Table
Access Requirements	Enter a Classification Standard in the search dialog box.



Classification Standards - Grade Conversion Table page

Standard Grade Conversion Data

Grade Enter the **Grade** you want to associate with this **Classification Standard.** You can associate multiple grades with this **Classification Standard** by inserting more rows.

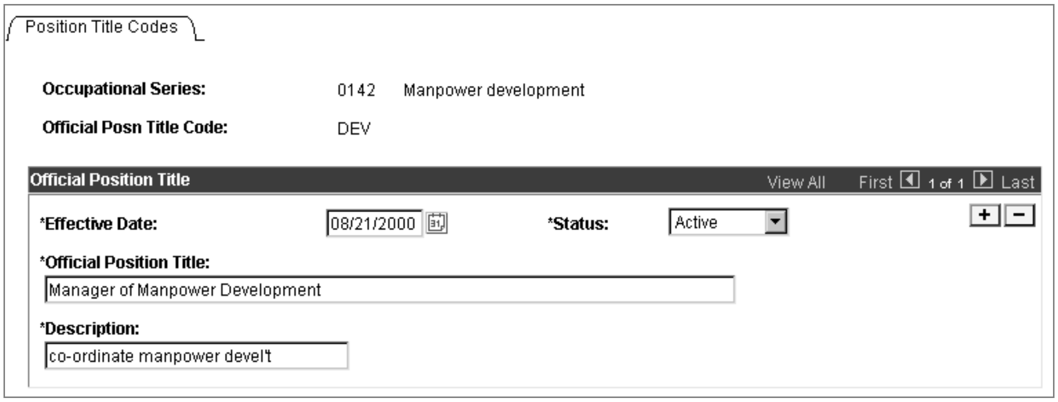
Point Range for Grade Enter a point range for each **Grade.**

USF Setting Up Position Title Codes

You'll set up the Official Position Titles and Organization Position Titles in order to link titles with job codes for various positions. 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.

USF Official Position Titles Page

Usage	Use the Official Position Titles setup page to set up official position titles that will later be associated with positions.
Object Name	GVT_PSN_TTL_TBL
Navigation	**Develop Workforce, Manage Positions (USF), Setup, Official Position Titles, Position Title Codes**
Prerequisites	Occupation Series page
Access Requirements	Enter an Occupational Series in the search dialog box.



Official Position Titles - Position Title Codes page

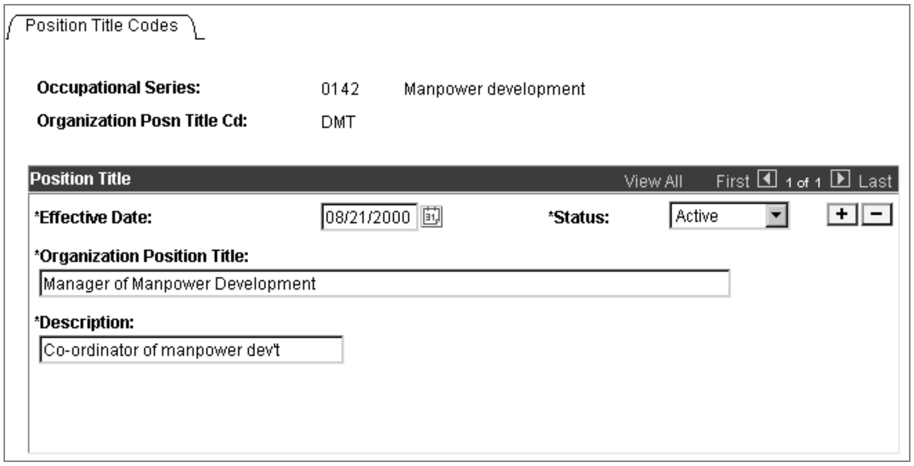
Official Position Title

The following fields are common to multiple pages and are defined at the front of this PeopleBook in PeopleBook Standard Field Definitions: **Effective Date, Status,** and **Description.**

Official Position Title Enter the **Official Position Title** to be associated with positions.

USF Position Titles Page

Usage	Use the Position Titles page to set up organization position titles that will later be associated with positions.
Object Name	GVT_ORG_PSN_TTL
Navigation	**Develop Workforce, Manage Positions (USF), Setup, Organization Position Titles, Position Title Codes**
Prerequisites	Occupation Series page
Access Requirements	Enter an Occupational Series in the search dialog box.



Organization Position Titles - Position Title Codes page

Position Title

The following fields are common to multiple pages and are defined at the front of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date, Status,** and **Description.**

Organization Position Title	Enter the **Organization Position Title** to be associated with positions.

Creating Positions

You'll use the Position Data pages to define positions. You will create and maintain position data on these pages, and after you've assigned employees to the positions, this is where you'll update data that affects both positions and incumbents.

The Position Data component contains five pages. On the Description page, you'll assign the position a number and enter essential information, such as position status and description. On the Work Location page, you'll enter location-specific information such as company and department. On the Job Information page, you'll enter information about the job associated with the position, such as job code and standard hours. On the Specific Information page, you'll enter position-specific information such as position pool ID and work phone number. On the Budget & Incumbents page, you review budget and incumbent information associated with this position.

The system identifies each position by a unique number. You can specify the position number when creating a new position or you can allow the system to assign a number for you by clicking OK on the Position Number dialog box without specifying a position number. To avoid maintaining two different sets of position numbers, we recommend that you either always assign numbers manually or always let the system do it, but that you not do both.

The system will number positions in sequence. For example, if the last position created was 314, the system will give the next new position the number 315. If you let the system assign the number automatically, it first appears as ***00000000.*** The actual number assigned to the position will appear after you save the information that you enter in the Position Data pages.

Enterprise Integration Point (EIP) Related to the Position Data Component

When you add, delete, or change position information in the PS_POSITION_DATA record (of the Position Data component), the system automatically publishes the Position Data EIP message to any other PeopleSoft or third-party applications that subscribe to the message. The message supplies the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes the message regardless of which component or page is the source of the update to the PS_POSITION_DATA record on the Position Data component.

For more information about the subscribers and technical details of this EIP, see Position Data. For more information about Human Resources Enterprise Integration, see Overview of Enterprise Integration in PeopleSoft Human Resources.

Establishing Reporting Hierarchies by Creating a Top Position

You can use the Position Data pages to establish a reporting hierarchy among positions using the Reports To and Dot-Line fields on the Description page. 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.

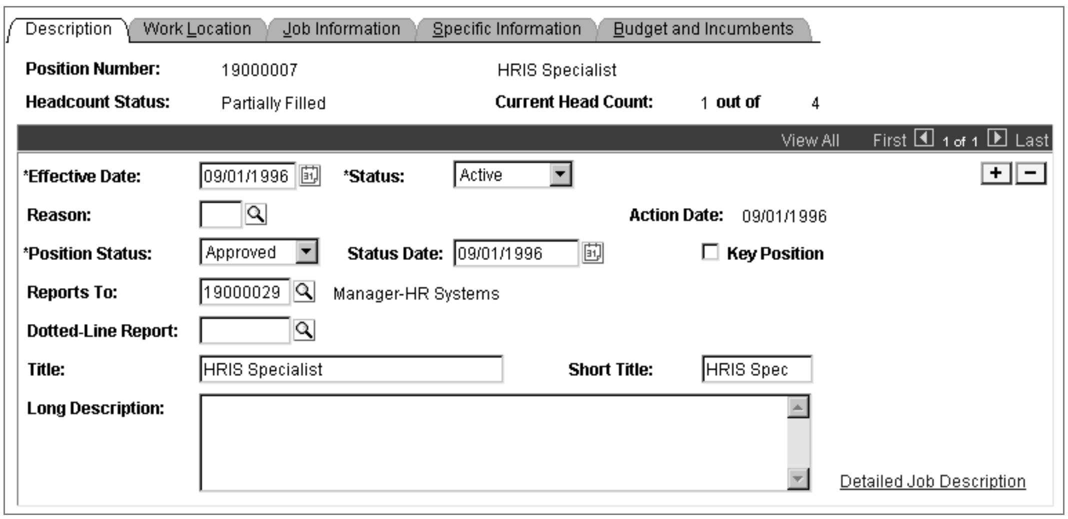
To establish reporting hierarchies, you'll need to create a top position that reports to itself. To establish a top position:

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.

Position Data - Description Page

Usage	Use the Description page to enter information about the position, such as status information and description.
Object Name	POSITION_DATA1
Navigation	• **Define Business Rules, HRMS Tree Panels, Position, Position Data, Description** • **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**
Prerequisites	Job Code Table
Access Requirements	To let the system assign a position number for a new position, click OK without specifying a position number. Otherwise, enter a Position Number.



Position Data - Description page

The following fields are common to multiple pages and are defined at the front of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date**, **Status**, **Action Date**, and **Status Date**.

Initialize If you are adding a new position, the Initialize button is displayed. Select this button if you want to copy all or many of the characteristics of a similar existing position. When you select the **Initialize** button, a dialog box prompts you for the **Position Number** of the position you want to copy. Click **OK** and the system will populate the Position Data component with the position information of the position you selected. You can override any information that doesn't apply to the new position.

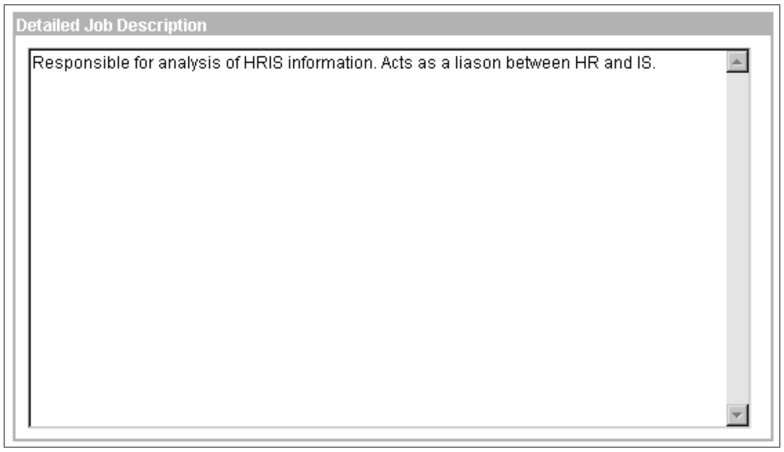
If you aren't aware of any similar positions that you could use to populate the remaining fields, you should simply populate the key fields one by one.

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 use the **Reports To** field 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, you will enter the position's number here. For example, in the CEO's position record, you would enter the CEO's position number in the **Reports To** 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 the Title field. You can also leave this blank and later select a Job Code value on the Job Information page, and this field will display the title associated with that job code. You can override the default. This information will be displayed on the incumbent's Employment record.
Long Description	Use the **Long Description** field to describe the position in more detail. This field will display information from the Job Code Table when you select a Job Code on the Job Information page.
Key Position	If this is a key position, select the **Key Position** check box.
Short Title	Enter a short title of the position in the **Short Title** field. When you select a Job Code value on the Job Information page, this field will display the short title associated with that job code. You can override the default.
Detailed Job Description	Select **Detailed Job Description** to access the Detailed Job Description page and enter a detailed job description, if required, for this position.

Position Data – Description: Detailed Job Description Page

Usage	Use the Detailed Job Description page to enter a detailed description of the job performed by this position.
Object Name	POSN_DESCR_SEC
Navigation	Click the Detailed Job Description link on the Position Data - Description page.

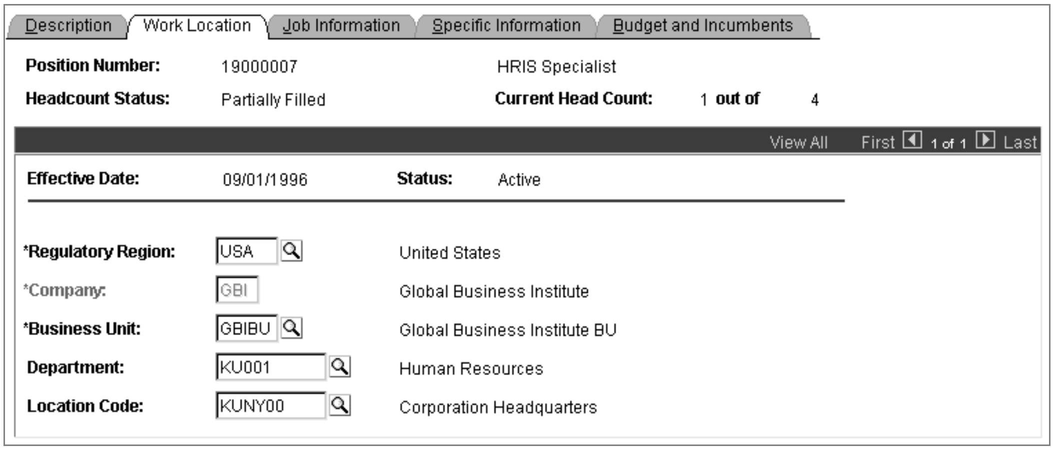


Position Data – Description: Detailed Job Description page

Enter a detailed job description for this position, if required. When you select a Job Code value on the Job Information page, this field will display the long description associated with that job code. You can override or add to the default.

Position Data - Work Location Page

Usage	Use the Work Location page to enter location-specific information about the position.
Object Name	POSITION_DATA2
Navigation	• **Define Business Rules, HRMS Tree Panels, Position, Position Data, Work Location** • **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**
Prerequisites	Position Data-Description page.
Access Requirements	Position Number



Position Data - Work Location page

Regulatory Region — Select the **Regulatory Region** associated with this position from the list of available options.

Company — When you select a **Department** this field will display the associated **Company** and become unavailable for entry. If the **Department** you choose has no associated **Company**, you can select one from the list of available options.

Business Unit — Select the **Business Unit** that this position is associated with 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** you select has an associated **Company** and/or **Location Code**, these values will appear in their respective fields.

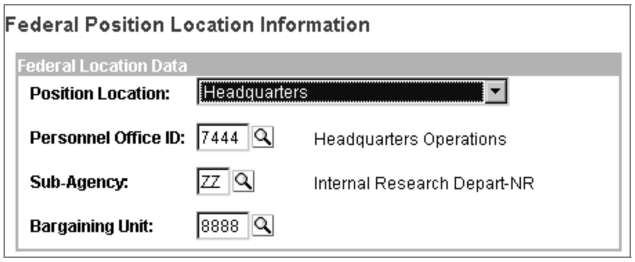
Location Code — When you select a **Department** this field will display the associated **Location Code.** If the **Department** you choose has no associated **Location Code**, you can select one from the list of available options. The **Salary Plan** on the Job Information page will default to the salary plan value associated with this location, if one has been specified.

Federal Data — Click this link to launch the Federal Position Location Information page. This link is intended for USF customers.

Position Data – Work Location: Federal Position Location Information Page

Usage	Use the Federal Position Location Information page to enter Federal-specific location information for this position.
Object Name	GVT_POSN_DATA2_SEC

Navigation	Click the Federal Data link on the Position Data - Work Location page.



Position Data – Work Location: Federal Position Location Information page

Position Location

Indicate whether the **Position Location** is in the ***Field***, ***Headquarters***, or ***none***.

Personnel Office Identifier ID

Select the **Personal Office Identifier 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

The **Sub-Agency** defaults to a value stored in the department table when you select a Department on the Work Location page. You can override this value if required.

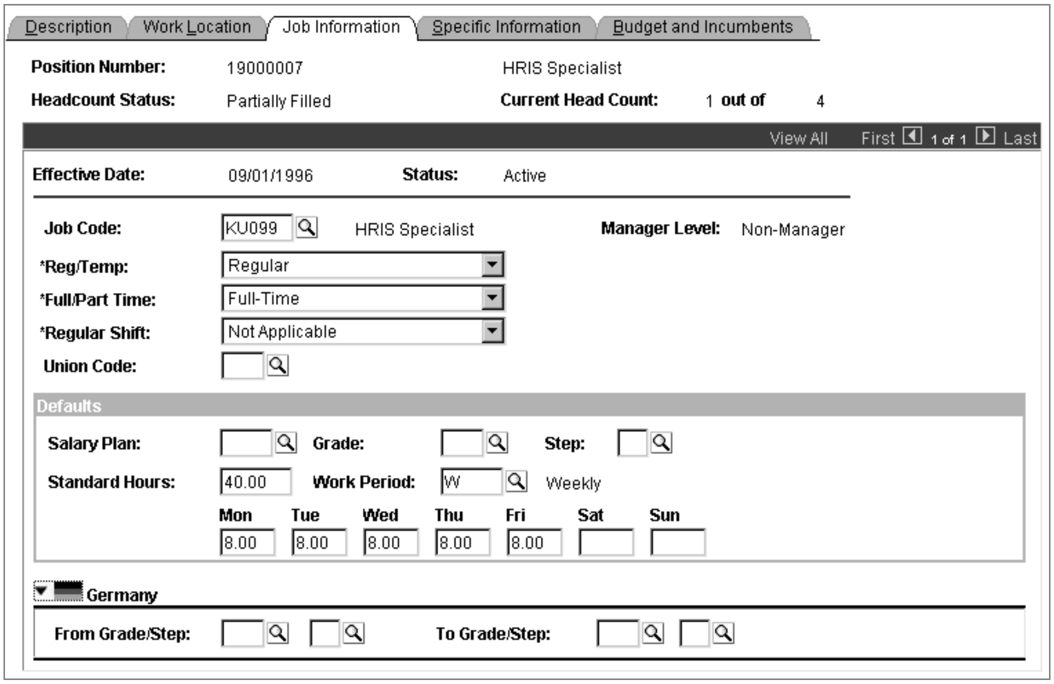
Bargaining Unit

Enter the union **Bargaining Unit** associated with this position, if appropriate.

Position Data - Job Information Page

Usage	Use the Job Information page to enter information about the job associated with the position.
Object Name	POSITION_DATA3
Navigation	• **Define Business Rules, HRMS Tree Panels, Position, Position Data, Job Information** • **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**
Prerequisites	Position Data-Work Location page

Access Requirements	Position Number.



Position Data - Job Information page

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 copies over default values for the following fields that can be overridden on this component.

- **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 will enter 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***, you should 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 will enter 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 from the list of available options. Valid shift codes are stored in the Translate Table.

Union Code
If applicable, select a **Union Code** from the list of available options.

Federal Data
Select **Federal Data** to launch the Federal Position Job Information page. This link is intended for USF customers.

Defaults

Pay Plan
Select the **Pay Plan** associated with the position form the list of available options.

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 you select will display on the Job Data record when you assign a new hire to a position. Any further updates to the salary information of a position incumbent have to be done at the employee level in the Job Code Table.

Grade
Select the **Grade** associated with the position from the list of available options.

Step
Select the **Step** associated with the position from the list of available options.

For more information about salary plans, see Planning Salaries.

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** may be 40.0

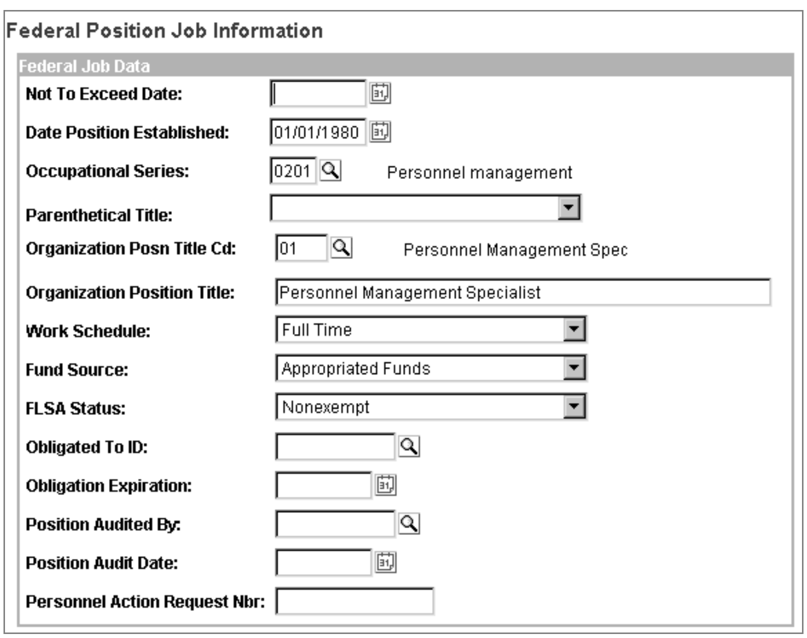
Work Period	Select the **Work Period** associated with this position. The **Work Period** is the smallest unit of time that employers use to communicate working hours to their employees. If you select a ***Weekly*** **Work Period** you can enter the hours worked per day in the fields (**Mon, Tue, Wed, Thu, Fri, Sat,** and **Sun)** provided.

Germany

From Grade/Step	Enter the salary grade and step from which the salary range begins for this position.
To Grade/Step	Enter the salary grade and step at which the salary range ends for this position.

Position Data – Job Information: Federal Position Job Information Page

Usage	Use the Federal Position Job Information page to enter Federal-specific job information for this position
Object Name	GVT_POSN_DATA3_SEC
Navigation	Click the Federal Data link on the Position Data - Job Information page.



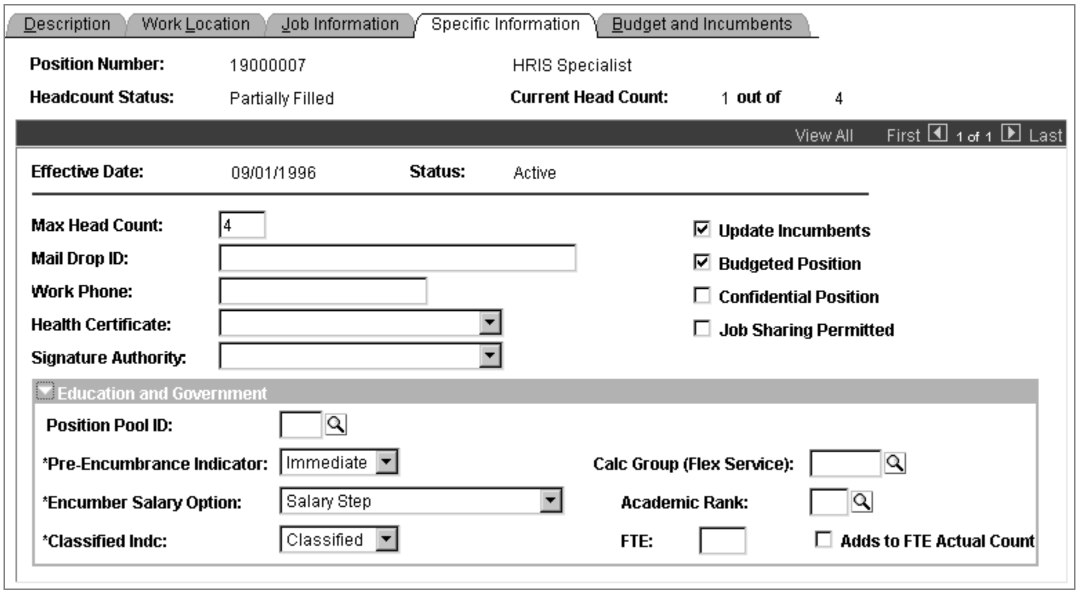
Federal Position Job Information page

Not To Exceed Date	If you specified this position as ***Temporary*** in the **Reg/Temp** field on the Job Information page, then you should specify a **Not To Exceed Date**, the date on which the position should expire.
Date Position Established	Enter the **Date Position Established.** This is a required field. Make sure the position established date is the same as or earlier than the effective date of the position.
Occupational Series	Verify that the **Occupational Series** default is correct and select a new one if necessary.
Parenthetical Title	The **Parenthetical Title** will be shown 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, you may want to consider creating separate Job Codes for those positions that are covered by special rates and those which aren't.
Organization Posn Title Code (Organization Position Title Code)	Select the **Organization Posn Title Code** if there is more than one position with the same **Organization Position Title.**
Organization Position Title	Enter the **Organization Position Title.** The system inserts the **Organization Position Title** if one is tied to the Job Code.
Work Schedule	Verify that the **Work Schedule** default is correct and select a new one if necessary.
Fund Source	Select a valid **Fund Source** code (codes reside in the Translate Table). This enables you to identify the primary source of funding for this position whether it is appropriated funds, non-appropriated funds, external funds or other.
FLSA Status	Determine the appropriate coverage under the Fair Labor Standards Act, and select either ***Exempt*** or ***Nonexempt*** as the **FLSA Status.**
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.

Position Audited By	If your agency does periodic position or desk auditing, the auditor and the date the position was audited may be tracked here. Select the auditor from the list of available options in the **Position Audited By** list box.
Position Audit Date	Enter the **Position Audit Date.**
Personnel Action Request Nbr (Personnel Action Request Number)	Enter the **Personnel Action Request Nbr,** if appropriate.

Position Data - Specific Information Page

Usage	Use the Specific Information page to enter information that is specific to the position you're creating, such as the work phone number and the mail drop ID.
Object Name	POSITION_DATA5
Navigation	• **Define Business Rules, HRMS Tree Panels, Position, Position Data, Specific Information** • **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**
Prerequisites	Position Data-Job Information
Access Requirements	Position Number



Position Data - Specific Information page

Max Head Count (Maximum Head Count)
: Enter the maximum head count allowed for this position. The **Max Head Count** defaults to 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 enables job sharing or can be assigned to more than one person, change the head count to the appropriate number.

Mail Drop ID (Mail Drop Identification)
: Enter a **Mail Drop ID** number assigned to this position, if applicable.

Work Phone
: Enter the **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 the **Update Incumbents** check box to have the system automatically cross-update incumbent job data on the Job Data component. The **Update Incumbents** option isn't applicable until you have assigned an employee to the position.

Note. Federal users don't currently use this field.

For more information about using the **Update Incumbents** option to update position and incumbent data, refer to “Managing Position Data” in this PeopleBook.

Budgeted Position The **Budgeted Position** option defaults to selected. If this position's status is proposed or frozen, clear this check box. Otherwise, leave it on for reporting purposes, so that the system knows that this is an approved, "real" position.

Confidential Position Select this check box if this position is confidential.

Job Sharing Permitted Select this check box 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.

Federal Data Click **Federal Data** to launch the Federal Position Specific Information page. This link is intended for USF customers.

Education & 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 HRMS implementation project in a single position pool and then assign a budget to that pool.

For more information about position pools, refer to Managing Commitment Accounting, “Commitment Accounting Processing Control Tables”.

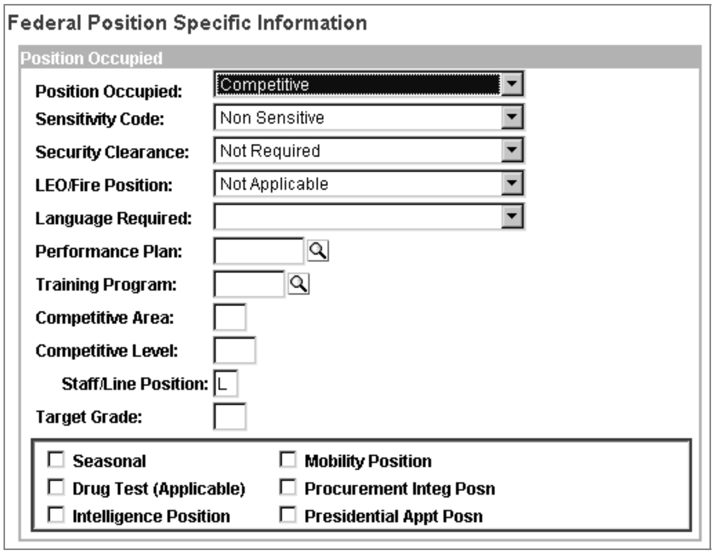
Pre-Encumbrance Indicator In the **Pre-Encumbrance Indicator** field, indicate if you want the position to encumber immediately (***Immediate***), not at all (***None***), or upon requisition (***Requistn***).

Encumber Salary Option If you are encumbering salaries using the Commitment Accounting, select an **Encumber Salary Option**. The system will use the option you select here to determine salary when it encumbers the salaries of vacant positions.

Encumber Salary Amount	If you are encumbering salaries using the Commitment Accounting, enter an **Encumber Salary Amount**. The system will use the amount 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 the **Classified Indc** field to tie the position to 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)	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 (Full Time Equivalent)	Enter the **FTE** value for this position to be used for defining an FTE budget in Commitment Accounting.
Adds to FTE Actual Count	Select the **Adds to FTE Actual Count?** check box 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.

Position Data - Specific Information: Federal Position Specific Information Page

Usage	Use the Federal Position Specific Information page to enter Federal-specific information for this position
Object Name	GVT_POSN_DATA5_SEC
Navigation	Click the Federal Data link on the Position Data - Specific Information page.



Federal Position Specific Information page

Position Occupied

In the **Position Occupied** field, select the appropriate Office of Personnel Management (OPM) position definition. Most positions will fall into the ***Competitive Service*** or the ***Excepted Service*** definition.

Sensitivity Code

The **Sensitivity Code** also comes from the Translate Table and uses standard OPM codes. This value defaults from the Job Code but can be overridden here.

Security Clearance

You may 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 field.

LEO/Fire Position (law enforcement officer position)

For pay and benefits purposes, you will specify whether the position is subject to special provisions in the **LEO Position** field.

Language Required

If this position requires a language other than or in addition to English, indicate that by selecting from the available **Language** options**.**

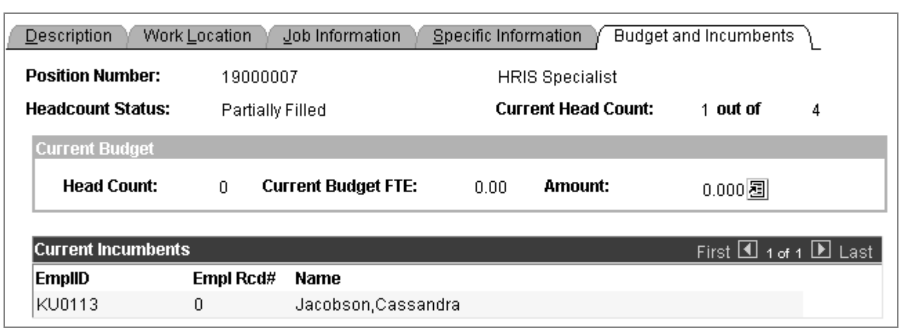
Performance Plan	Depending on how you choose to implement Performance Management, the **Performance Plan** field will tie your positions to Performance Plans that you establish using the Performance Management module. You may create specific performance plans and standards for each position, or you may choose to create more generic descriptions of performance expectations. In either case, Performance Management and Position Management are closely tied together using this field. This isn't a required field. You may choose not to implement Performance Management 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. This information is also used in Career Planning.
Competitive Area	**Competitive Area** is used mainly for Reduction-in-Force (RIF) processing but may also be used intermittently for internal placement purposes. This field contains values assigned locally that group like jobs together using criteria such as grade, location, duties and responsibilities to ensure equitable job comparisons.
Competitive Level	**Competitive Level** is used mainly for Reduction-in-Force (RIF) processing but may also be used intermittently for internal placement purposes. This field contains values assigned locally that group like jobs together using criteria such as grade, location, duties and responsibilities to ensure equitable job comparisons.
Staff/Line Position	Identify if this is a Staff or Line Position (***S*** or ***L***).
Target Grade	Indicate if this position has a **Target Grade**.
Seasonal	Select the **Seasonal** check box to identify the position as a seasonal position.
Drug Test (Applicable)	Select the **Drug Test (Applicable)** check box to indicate if a drug test is applicable for incumbents to this position.
Intelligence Position	Select the **Intelligence Position** check box to indicate that this position belongs to the intelligence community.
Mobility Position	Select the **Mobility Position** check box 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 the **Procurement Integ Posn** check box to identify the position as one covered by the Procurement Integrity Act.

Presidential Appt Posn (presidential appointment position)
Select the **Presidential Appt Posn** check box to identify the position as one that requires a Presidential appointment.

Position Data - Budget & Incumbents Page

Usage	Use the Budget & Incumbent page to review the position's current budget and incumbents.
Object Name	POSITION_DATA6
Navigation	• **Define Business Rules, HRMS Tree Panels, Key Postn, Key Position, Budget and Incumbents** • **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**
Access Requirements	Position Number



Position Data - Budget & 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.

Current Incumbents After you've assigned an employee to the position, the **Current Incumbents** group box displays the current incumbents' **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. You will enter personal data for employees in the Administer Workforce Personal Data. Because you have already set up most job-related data in the Manage Positions pages, the system automatically inserts default organizational and job data in many fields in the employee Job Data Pages.

For more information on hiring new employees into positions, see Hiring Your Workforce.

For more information on assigning employees already in the system to new positions, see Updating Workforce Information. **USF** For more information about assigning employees already in the system to new positions, see USF Administering Personnel Action Requests and USF Processing Personnel Action Requests.

CHAPTER 3

Managing Position Data

Once you have set up all the positions in your company and have assigned employees to them, you'll need to keep the information about positions and incumbents up-to-date. To do this, you'll use the same pages that you used to create positions and assign employees to them.

Overview

The system handles the position data changes in different ways depending on whether 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 will be discussing how to manage and update positions. We will be referring to the Position Data pages that are described in the previous chapter, Setting Up Positions. We will also be discussing how some changes made to positions can impact the Job Data record.

For more information about creating positions, see Creating Positions and for information about assigning employees to positions, see Hiring Your Workforce.

Maintaining Position Data

Periodically, you'll need to enter changes to position data, such as a title change or a position that becomes inactive. You'll also need to update employee data from time to time, 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.

Determining Where To Update Data

Once you've determined the type of change that you want to make, where do you go to make the changes? If it's incumbent data, go to the Administer Workforce Job Data component to make your changes. If it's position-related, make your changes in the Position Data pages. If your changes affect both position and incumbent data, you'll use the Position Data pages; the system will automatically maintain the current incumbent data in the Job Data pages.

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

In this section, 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. By simply entering a new department or location, you'll 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.

Note. You'll find instructions for updating employee data in Updating Workforce Information.

USF Determining Where To Update Data

Once you've determined the type of change that you want to make, where do you go to make the changes? If it's employee data, go to the Administer Workforce (USF), HR Processing component to make your changes. If it's position-related, make your changes in the Position Data component. If your changes affect both position and incumbent data, you'll use the Position Data component and then update the employee-level information in the components in the Administer Workforce menu.

In this section, 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 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.

You'll find instructions for updating employee data in USF Processing Personnel Action Requests.

Distinguishing Incumbent and Position Data

Depending on the type of information that you're updating, you will make changes in the Position Data pages or in the Job Data pages. Before you begin, it's critical that you think about what kind of action 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'll 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, then you will make these changes in the Position Data pages. These changes will be 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 defaults on the Job Data record for the next incumbent.

Changes to some fields in the Position Data component will update to 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, we provided you with 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 will be 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 would include 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, you will need to 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, you will need to make a change in both components.

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.

To make changes to position data, perform the following steps:

1. Open Position Data - Description.

2. Insert a new data row.

The system will enter the system date, which is usually today's date, as the Effective Date. You'll change this unless today is the first day that the change takes effect.

3. Enter a Reason for the new row, if any.
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'll 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 all this information at your fingertips, 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, you'll enter the changes by inserting new data rows in the Position Data pages. The system will maintain 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 read your mind: 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 simply 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.

For more information about employee data security, see Administering 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, you'll always use the Position Data pages unless you are updating Standard Hours. You'll 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-line promotions—where the job code and salary data changes, but the position doesn't—affect incumbent salary. You'll use the Position Data pages to change the job codes for positions. Once you've saved this information, you'll need to 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, you won't enter the salary amount. Instead, you'll 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, you'll need to follow a few simple guidelines, which vary with the action you take:

- When you make insertions, deletions, or corrections to job data that affect the current incumbent payroll (Payroll for North America), the system will, where needed, mark payline records for recalculation. When payroll is recalculated, the payroll system will use the new information.

For more information about payline records, see PeopleSoft 8 Payroll for North America PeopleBook.

- When you make insertions, deletions, or corrections to the current incumbent Job Data or Employment data that affect benefits, the system will set 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 will automatically set the flag for COBRA activity in benefits.

For more information about COBRA and event maintenance, see PeopleSoft Base Benefits System.

Updating Job Data

You'll 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 have made changes in the Position Data component.

Inserting New Rows

The most common way that you'll 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 will also update 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 is clear in the current job data row.
- The Update Incumbents check box in Position Data, Specific Information 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 Position Data, Position Location.

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. Don't worry. 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'll use the Correction action for current rows and the Update/Display action for future effective-dated rows.

To delete a row:

1. Open Position Data - Description.

1. 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'll need to update them manually.

2. Save the changes that you have made to the position.

3. You can now proceed and 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, you'll 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 will 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'll have to update them manually.

When You Don't Want to Update Job Data

For typical position data changes, you'll save yourself a lot of 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 don't apply any longer.

Whenever you have set the check boxes so that maintaining job data won't occur, you'll need to 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'll use the Position Data Override check box most frequently 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 defaults to *selected* 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'll 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'll clear this check box. The Update Incumbents check box is located on the Position Data - Specific Information page.

Cross-Checking Position Data

As you update data in fields that match in the Position Data and incumbent Job Data pages, periodically you'll want to 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 4

Maximizing Position Data

We have covered how to set up and maintain position data. Now it is time to go over how to make the most use of the information. Position data can be used for budgeting purposes, position history, organizational planning, and organization status. This section will review how to get the most out of your position data.

Overview

The information you use to maintain and track positions can serve you in many areas of human resources, including organizational planning, budgeting, recruitment, and career planning. To help you maximize the usefulness of this data, you can enhance the Manage Positions Business Process with several valuable features.

You can choose to manage budget information at various levels within a department, such as for the department as a whole, by job code, or by position. 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 if you need to make changes after a budget has been approved, you can enter year-to-date adjustments.

If you use organization charts to assist you in organizational planning, you'll want to see the reporting relationships among positions. You can get this information in two ways: by generating a report listing "reports-to" relationships among positions, or by creating a position tree in the Tree Manager to view your organizational hierarchy in graphical form.

When you're planning your organization's future, you'll want to draw on position, incumbent, and budgeting data from the past and present. PeopleSoft Human Resources gives you some quick ways to get the information you need through display-only summary pages and Manage Positions reports.

For more information about setting up department budgets for your HRMS system, see Defining Fiscal Year Budgets. For more information about reporting on positions, see Running Position Management Reports.

Before You Begin

You'll find all the pages discussed in this section in the Manage Positions menu. We also discuss creating a position hierarchy using the Tree Manager.

The procedures for accessing and entering information in the Manage Positions pages mirror those for updating any PeopleSoft table or page.

Before you can use position data for the tasks covered in this section, position data records must already exist in the system. For more information on creating positions, see Setting Up Positions in this PeopleBook.

Creating Departmental Budgets

When you drive 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 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. You can select the departments for which you find the budgeting feature the most effective.

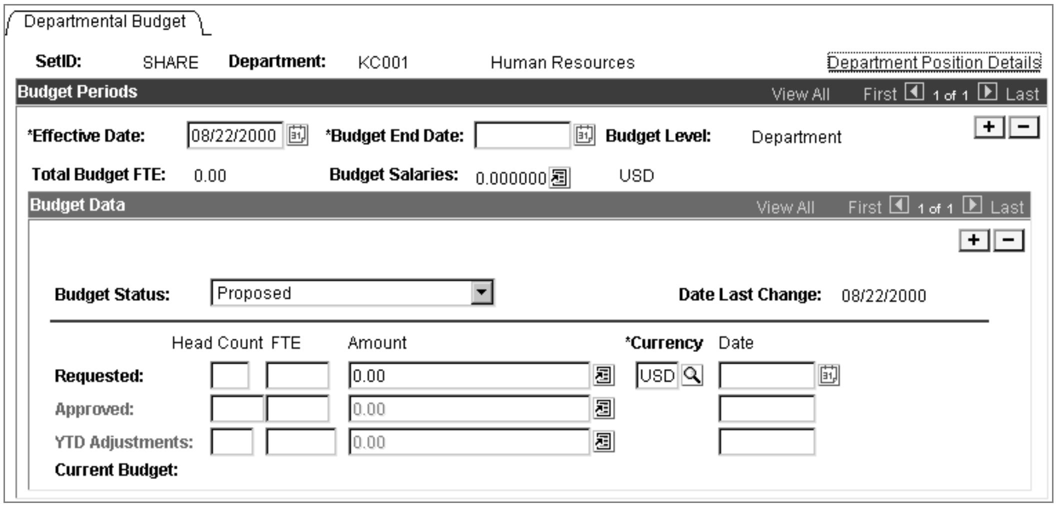
You can establish budgets at several levels: by department, job code, or position. Our examples in this section show budgeting at the position level, because it gives you the greatest amount of detail and takes full advantage of the budgeting pages. However, you can use this page for budgeting by job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

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

For more information about setting the budget level, see Setting Up Control Tables. To include a position in a departmental budget, the Budgeted check box must be selected in the Position Data, Information page.

Departmental Budget Page

Usage	Use the Departmental Budget page to establish department, job code, or position budgets.
Object Name	POSN_BUDGET_DATA
Navigation	• **Develop Workforce, Manage Positions, Use, Departmental Budget, Departmental Budget** • **Develop Workforce, Manage Positions (USF), Use, Departmental Budget, Departmental Budget**
Prerequisites	Position Data components
Access Requirements	SetID and Department ID



Departmental Budget

Department Position Details Click **Department Position Details** to launch the Departmental Budget - Department Position Details Page, which displays information about this department.

Budget Periods

Effective Date Enter the date that the budget becomes effective in the **Effective Date** field.

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

Budget End Date Enter the date the budget ends in the **Budget End Date** field.

Budget Salaries The system 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 of valid position numbers you've created. The system will prompt you only with positions in this department.

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.

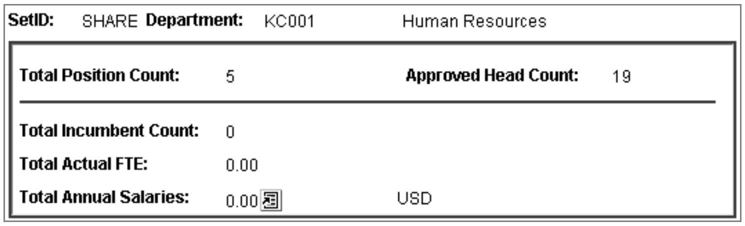
Budget Status	Indicate the **Budget Status**. The system default is ***Proposed***, and makes the fields in the **Approved** and **YTD Adjustments** lines unavailable for entry. When you select ***Approved***, the system copies the **Requested** figures to the **Approved** line and becomes available for data entry so that you can enter the actual amounts, if they are different. When you select ***Frozen***, only the **Requested** amount line will remain available for you to enter data.
Date Last Change	Every time you make changes to information in this page, the system will update the **Date Last Change** with the system date, usually today's 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 will become 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 defaulted from the **Requested** line.
YTD Adjustments (year-to-date adjustments)	Use the **YTD Adjustments** 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 will display the total salaries and total budgeted FTEs. The total salary amounts appear in the currency specified in the Primary Permission List Preferences table.

Departmental Budget - Department Position Details Page

Usage	Use the Department Position Details page to view details about the department.
Object Name	DEPT_BUD_DATA_DTL

Navigation	To access the Department Position Details page, click Department Position Details on the Departmental Budget 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 (total full time equivalent)	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.

Viewing Budget Summary Information

When you're planning next year's budget, you'll want to retrieve the information from previous planning sessions. However, you 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 the data you need online. You can access pages containing prior and current budget data to help you prepare for the next round of budgeting.

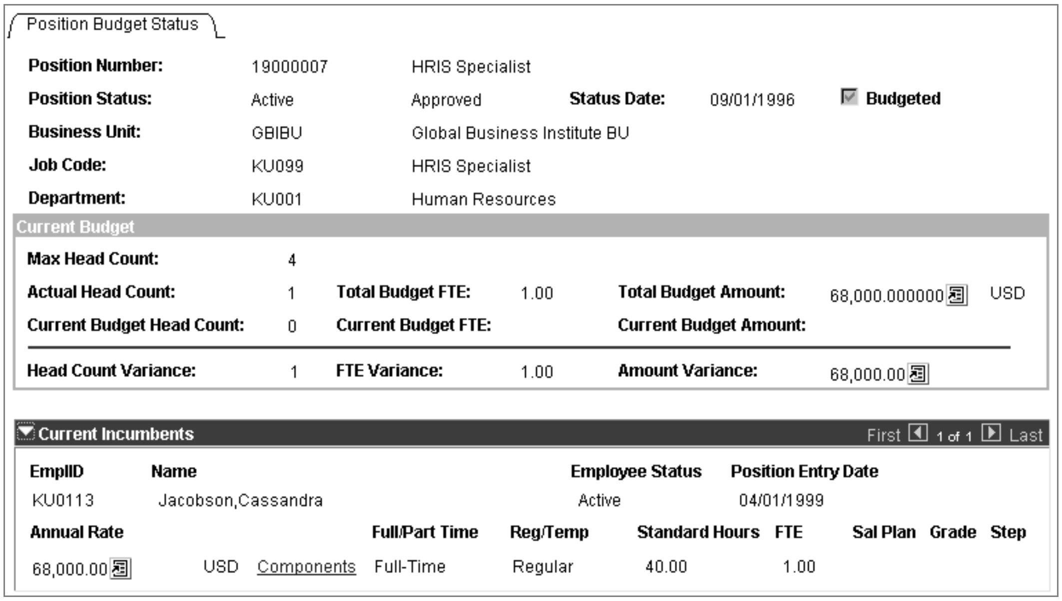
When you maintain a departmental budget at the position level, you'll use the Position Budget Status summary to see any differences between budgeted and actual figures for departments. If there is more than one incumbent, you can scroll through compensation-related data for them. The summary displays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

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

Position Budget Status Page

Usage	Use the Position Budget Status page to view a summary of budgeted and actual figures for departments.

Object Name	POSN_BUDGET_STATUS
Navigation	• **Develop Workforce, Manage Positions, Inquire, Position Budget Status, Position Budget Status** • **Develop Workforce, Manage Positions (USF), Inquire, Position Budget Status, Position Budget Status**
Access Requirements	Enter a Position Number.



Position Budget Status page

Current Budget

Max Head Count (maximum head count) — Displays the maximum head count defined for this position. Position **Max Head Count** is specified on the Position Data - Specific Information page.

Actual Head Count — Displays the actual number of employees assigned to this position.

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 (total budgeted full time equivalents) — Displays the total budgeted FTE for this position. This information is specified on the Position Data - Specific Information page.

Current Budget FTE (current budgeted full time equivalents)	Displays the current budgeted FTEs for this position. FTE budgets are defined on the Departmental Budget Page.
FTE Variance (full time equivalent 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 incumbent(s) 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.

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 will appear at the top of the screen.

If the actual figures are over budget, the variances will be *positive* numbers. If the actual figures are under budget, they will appear as *negative* amounts. And if the actual and budget amounts match, no figure will appear in the variance fields.

Current Incumbent(s)

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.

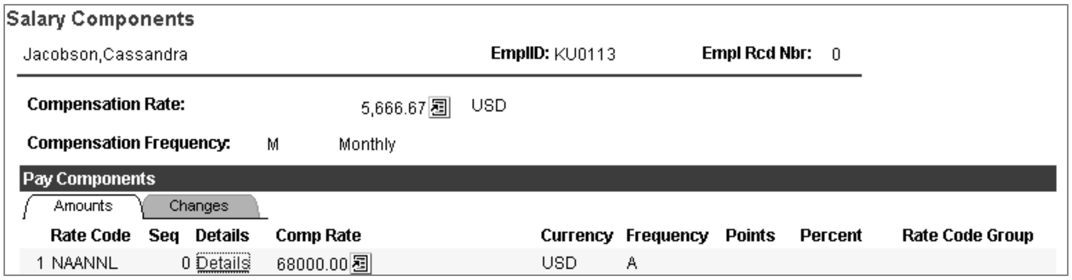
The system displays the incumbent's **EmplID** (Employee ID), **Name**, **Employee Status, Position Entry Date** (the date they were assigned to the position), **Annual Rate** (annual compensation rate), compensation currency, **Full/Part Time** status, **Reg/Temp** (regular or temporary) status, **Standard Hours** per week), **FTE** (full time equivalent) and **Sal Plan Grad Step** (salary plan, grade, and step).

Select the **Components** link to view the Position Budget Status - Salary Components Page.

Position Budget Status - Salary Components Page

Usage	Use the Position Budget Status – Salary Components page to review detailed salary information about the position incumbents at the position entry date and the position end dates, depending on which link you selected.

Object	COMP_POSN_BUDG_SEC
Navigation	Click the Components button on the Position Budget Status page for the employee whose salary information you want to view.



Position Budget Status - Salary Components: Amounts page

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

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **EmplID,** and **Empl Rcd#.**

Common Page Information

Compensation Rate	The system displays the position incumbent's **Compensation Rate.**
Compensation Frequency	The system displays the position incumbent's **Compensation Frequency.**

Amounts Tab

See the above exhibit for a view of this tab.

Rate Code	The system 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)	The system displays a **Seq** number. This number indicates 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. Use this page to review the **Description, Rate Code Type,** and **Rate Code Class** associated with the **Rate Code.**
Comp Rate (compensation rate)	The system displays the position incumbent's annual compensation rate.

Currency — The system displays the **Comp Rate Currency.**

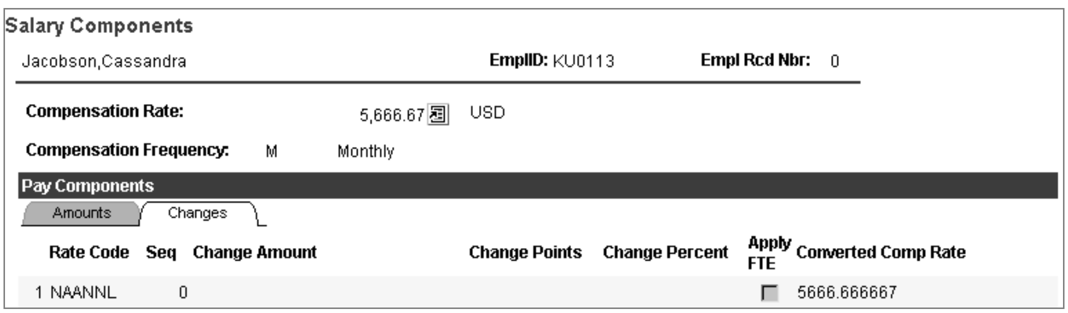
Frequency — The system displays the frequency over which the payee is paid the compensation rate.

Points — The system 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.

Rate Code Group — The system displays a **Rate Code Group** for this rate code.

Changes Tab



Position Budget Status - Salary Components: Changes page

Change Amount — **Change Amount** displays the overall change amount in this pay component rate.

Change Points — **Change Points** displays the overall change amount (in **Points**) for this pay component. This field is visible only if Salary Points is checked on the Installation Table setup page.

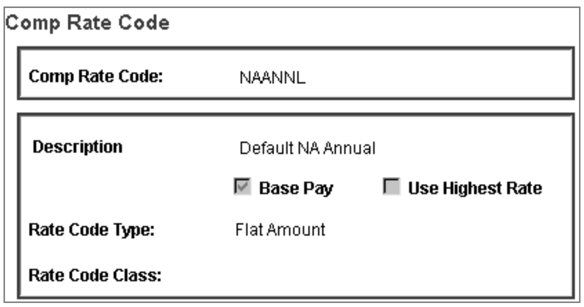
Change Percent — **Change Percent** displays the overall change amount for this pay component. This field isn't applicable to rate codes that have a rate code type of Percent or Points.

Apply FTE — If the **Apply FTE** 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 The system displays the **Converted Compensation Rate** for this pay component. The system converts all base pay components to the currency and compensation frequency you specify.

For more information about the field values above, see Working with Multiple Components of Pay. Multiple Components of Pay doesn't apply to Federal users.

Comp Rate Code Page



Comp Rate Code page

Description Displays the **Description** of the **Comp Rate Code**.

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 type:

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**.

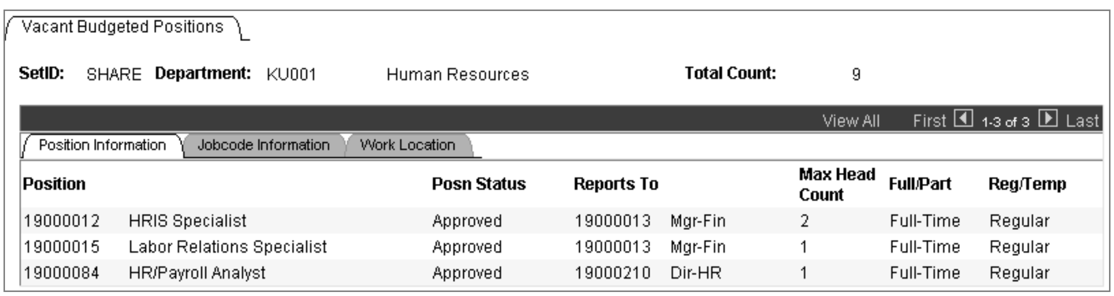
Viewing Vacant Budgeted Position Information

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 will help you plan recruitment activities and costs.

You can generate the Vacant Position Report, which shows all vacant budgeted positions in the system, and the Position Status Report, which lists all positions and their status (Federal users don't use this report).

Vacant Budgeted Position Page

Usage	The Vacant Budgeted Positions page displays position information about the positions currently vacant in the department.
Object Name	POSN_BUDGET_VACANT
Navigation	• **Develop Workforce, Manage Positions, Inquire, Vacant Budgeted Positions, Vacant Budgeted Positions** • **Develop Workforce, Manage Positions (USF), Inquire, Vacant Budgeted Positions, Vacant Budgeted Positions**
Access Requirements	SetID and Department



Vacant Budgeted Positions – Position Information page

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

Common Page Information

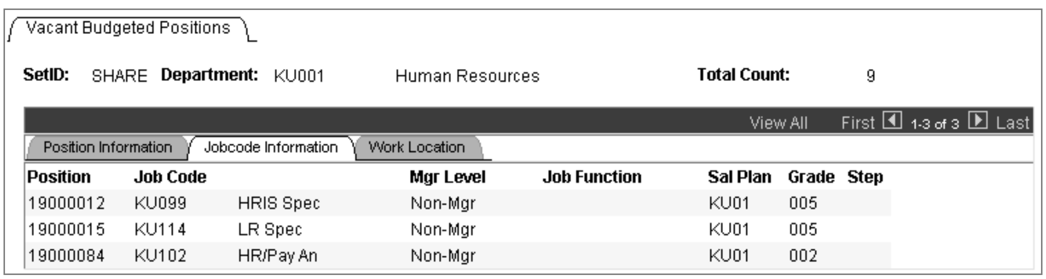
Total Count The **Total Count** displays the total number of vacancies in the department.

Position Information Tab

See the above exhibit for a view of this tab.

Position	Displays the **Position** number and title of the vacant position.
Posn Status (position status)	Displays the status (for example ***Approved*** or ***Frozen***) of any vacant, budgeted position.
Reports To	The **Reports To** information indicates which position the vacant position reports to along with the short description of that position.
Max Head Count (maximum head count)	Displays the maximum head count enabled for the vacant position.
Full/Part (full-time or part-time)	Displays whether the vacant position is ***Full-Time*** or ***Part-Time.***
Reg/Temp (regular or temporary)	Displays whether the vacant position is ***Regular*** or ***Temporary.***

Jobcode Information Tab


Vacant Budgeted Positions

SetID: SHARE Department: KU001 Human Resources Total Count: 9

View All First 1-3 of 3 Last

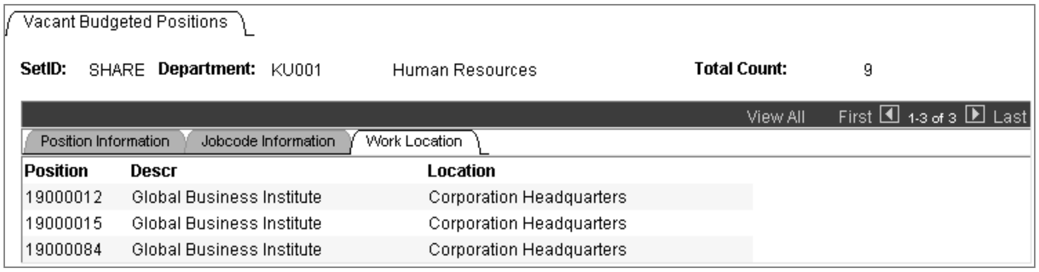
Position Information | Jobcode Information | Work Location

Position	Job Code		Mgr Level	Job Function	Sal Plan	Grade	Step
19000012	KU099	HRIS Spec	Non-Mgr		KU01	005	
19000015	KU114	LR Spec	Non-Mgr		KU01	005	
19000084	KU102	HR/Pay An	Non-Mgr		KU01	002	

Vacant Budgeted Positions – Jobcode Information page

Position	Displays the **Position** number of the vacant position.
Job Code	Displays the **Job Code** associated with the vacant position along with the short description of the job code.
Mgr Level (manager level)	Displays the vacant position's manager level.
Job Function	Displays the **Job Function** associated with the vacant position's **Job Code.**
Sal Plan (salary plan)	Displays the vacant position's salary plan.
Grade	Displays the vacant position's salary **Grade.**
Step	Displays the vacant position's salary **Step.**

Work Location Tab



Vacant Budgeted Positions – Work Location page

The following element is common to multiple pages in this application and is defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Descr.**

Position Displays the **Position** number of the vacant position.

Location Displays the **Location** assigned to the vacant position.

Reviewing Position Summary Information Online

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

PeopleSoft Human Resources offers you some quick ways to review the data you need online. In the Manage Positions menu, Inquire menu, you'll find display-only pages containing historical information on positions and the incumbents who have filled them.

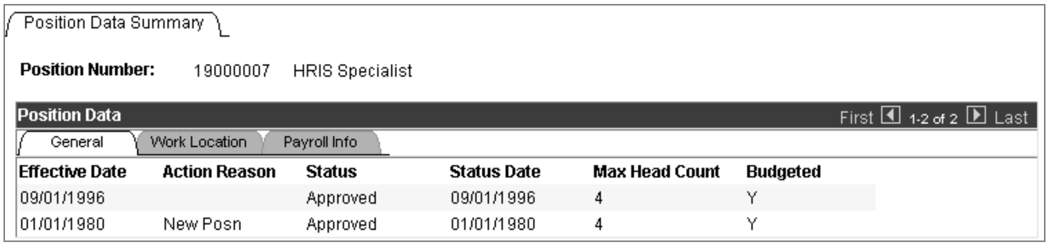
Position Data Summary Component

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

Position Data Summary Page

Usage	Use the Position Data Summary component to view general current and historical information about a position.
Object Name	POSITION_SUMMARY
Navigation	• **Develop Workforce, Manage Positions, Inquire, Position Data Summary, Position Data Summary** • **Develop Workforce, Manage Positions (USF), Inquire, Position Data Summary, Position Data Summary**

Access Requirements	Position Number



Position Data Summary – General page

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

General Tab

See the above exhibit for a view of this tab.

Effective Date Displays the date each change took effect for the position.

Action Reason Displays the action and reason for changes to the position as of that **Effective Date.**

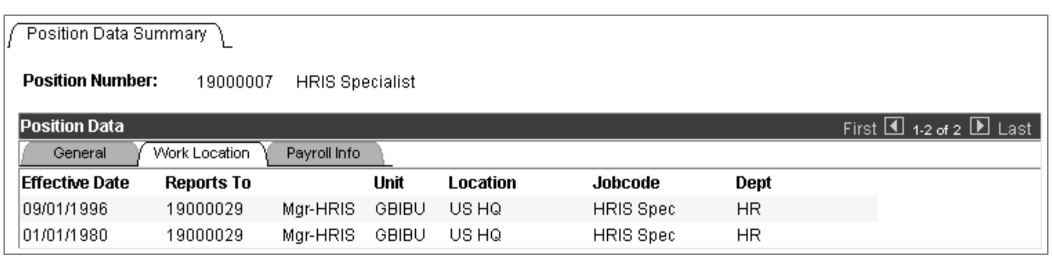
Status Displays the position **Status** as of that **Effective Date.**

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.

Max Head Count Displays the position's maximum head count.

Budgeted Indicates if the position is **Budgeted** (***Y***) or not (***N***).

Work Location Tab



Position Data Summary – Work Location page

Effective Date — Displays the date each change took effect for the position.

Reports To — Displays the number and title of the position this position reports to as of that **Effective Date.**

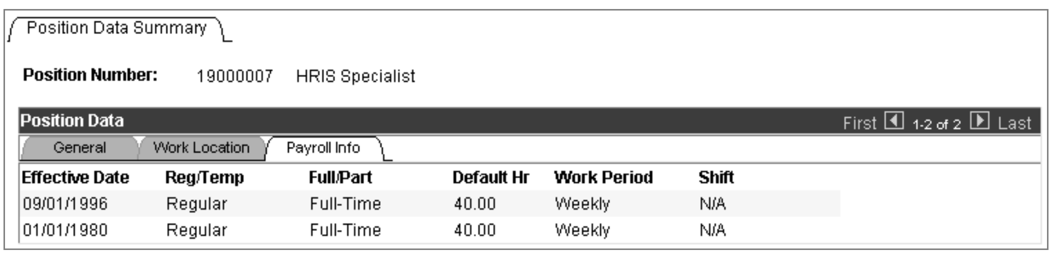
Unit — Displays the business **Unit** this position belongs to as of that **Effective Date.**

Location — Displays the **Location** this position is associated with as of that **Effective Date.**

Jobcode — Displays the **Jobcode** this position is assigned to as of that **Effective Date.**

Dept (department) — Displays the department this position belongs to as of that **Effective Date.**

Payroll Info Tab


Position Data Summary

Position Number: 19000007 HRIS Specialist

Position Data First 1-2 of 2 Last

General | Work Location | Payroll Info

Effective Date	Reg/Temp	Full/Part	Default Hr	Work Period	Shift
09/01/1996	Regular	Full-Time	40.00	Weekly	N/A
01/01/1980	Regular	Full-Time	40.00	Weekly	N/A

Position Data Summary – Payroll Info page

Effective Date — Displays the date each change took effect for the position.

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.**

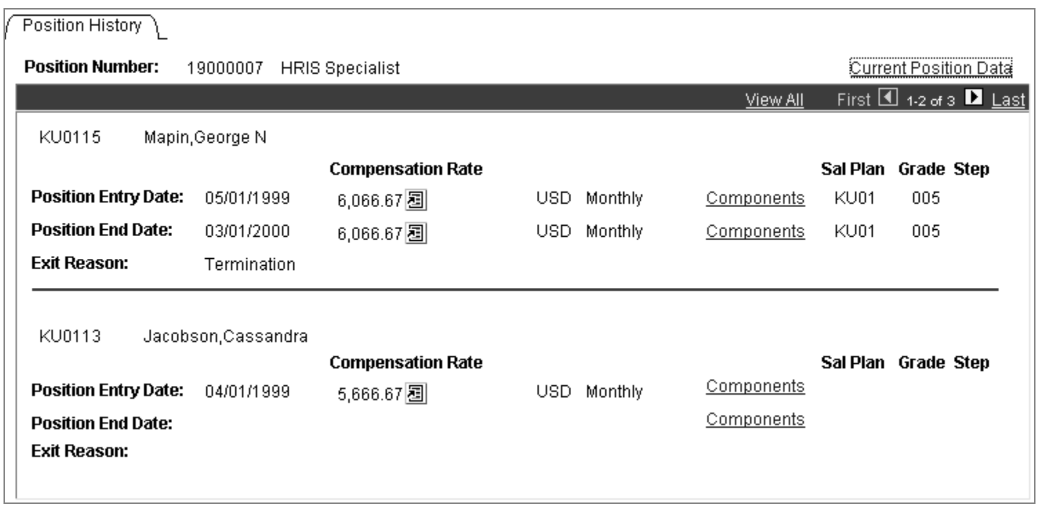
Std Hours (standard hours) — Displays the position's standard hours as of that **Effective Date.**

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 Frequency table.

Shift — Displays the **Shift** information as of that **Effective Date,** if applicable.

Position History Page

Usage	Use Position History to see information on incumbents currently and previously assigned to a position. 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.
Object Name	POSITION_HISTORY
Navigation	• **Develop Workforce, Manage Positions, Inquire, Position History, Position History** • **Develop Workforce, Manage Positions (USF), Inquire, Position History, Position History**
Access Requirements	Position Number



Position History page

Current Position Data — Click **Current Position Data** to launch the Position History - Current Position Data Page.

Position Entry Date — Displays the date the employee was assigned to the position.

Position End Date — Displays the date that the employee exited the position.

Exit Reason — Displays the reason the employee 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 **Components** to launch the Position History - 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.

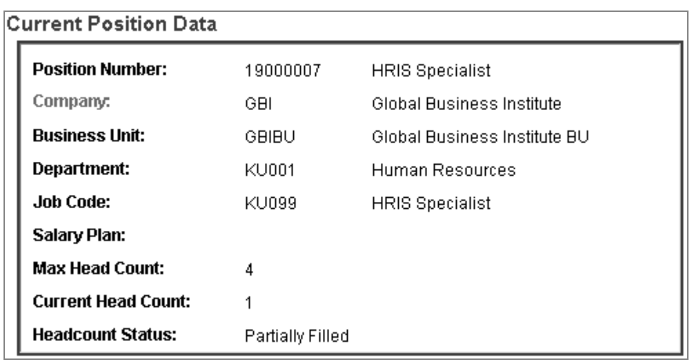
Sal Plan (salary plan) — The **Sal Plan** column displays the salary plan that was associated with the position at the incumbent's position entry and end dates.

Grade — The **Grade** column displays the salary Grade that was associated with the position at the incumbent's position entry and end dates.

Step — The **Step** column displays the salary **Step** that was associated with the position at the incumbent's position entry and end dates.

Position History - Current Position Data Page

Usage	Use the Position History - Current Position Data page to view current position details.
Object	CURRENT_POSN_DATA
Navigation	Click the **Current Position Data** button on the Position History page.



Current Position Data

Position Number:	19000007	HRIS Specialist
Company:	GBI	Global Business Institute
Business Unit:	GBIBU	Global Business Institute BU
Department:	KU001	Human Resources
Job Code:	KU099	HRIS Specialist
Salary Plan:		
Max Head Count:	4	
Current Head Count:	1	
Headcount Status:	Partially Filled	

Position History - Current Position Data page

Position Number — Displays the **Position Number** and description.

Company — Displays the **Company** the position is associated with.

Business Unit — Displays the **Business Unit** the position is associated with.

Department — Displays the **Department** the position is associated with.

Job Code — Displays the **Job Code** attached to the position.

Salary Plan	Displays the position's salary plan.
Max Head Count (maximum head count)	Displays the maximum head count enabled for this position.
Current Head Count	Displays the **Current Head Count** assigned to this position.
Headcount Status	Displays the **Head Count Status** for this position.

Position History - Salary Components Page

Usage	Use the Position History - Salary Components page to review detailed salary information about the position incumbents at the position entry date and the position end dates, depending on which link you selected.
Object	COMP_POSN_HIST_SEC
Navigation	Click the **Components** button on the Position History Page for the employee whose salary information you want to view.

The Salary Components page that you access from the Position History page is the identical to the Salary Components page that you access from the Position Budget Status Page. Please refer to Position Budget Status - Salary Components Page for information about this page.

Creating Job Requisitions

You can use PeopleSoft's position management feature 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.

Federal users don't use this process.

For more information about job requisitions, see Recruiting Your Workforce.

Create Job Requisitions – Prcsruncntl Page

Usage	Use the Create Job Requisitions process page to launch the Create Job Requisitions process. The Create Job Requisitions process creates job requisitions for all vacant positions in a company. The PRCSRUNCNTL page is documented in Application Fundamentals Reports.

Navigation	**Develop Workforce, Manage Positions, Process, Create Job Requisitions, Prcsruncntl**
Access Requirements	Enter a Run Control ID in the search dialog box.

Create Job Requisitions – Prcsruncntl page

Click **Run** to run this request. Process Scheduler runs the Create Job Requisitions process at user-defined intervals.

For more information about Process Scheduler, see Process Scheduler.

Maintaining Your Organizational Structure

With the Manage Positions Business Process, you can create reporting relationships among positions, showing how they look in hierarchical form. Viewing this information, either through a report or online, will assist you in organizational planning.

PeopleSoft Human Resources offers you two ways to see positions in hierarchical form. First, by entering supervisory position numbers in the Reports To Posn (position) field in the Position Data - Description page, you can generate reports that show you position hierarchies. Or, if you want to see part of your organization chart online, you can use the Tree Manager to create a position tree, which will illustrate position hierarchies.

Establishing Position Hierarchies

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

To set up position hierarchies, perform these steps:

1. Open the Position Data - Description page.
2. Establish Establishing Direct Reporting Relationships and/or Establishing Indirect Reporting Relationships 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 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. You'll find viewing position hierarchies 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 will hide the Supervisor ID in the incumbent Job Data. Otherwise, both fields will 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 will issue a warning message. You don't have to enter a position number after you acknowledge the message. But if you would like to require this field for all positions, you can 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 work for another position as well.

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. You would 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, you'll run an SQR, POS006A, which links the positions in the system and creates an organizational hierarchy. You should run this utility when you first enter the reporting relationships, any time you add new positions, and when you change reporting relationships among existing positions.

When you've selected Reports To Position codes in all the positions 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 the Tree Manager

We recommend that you review your Tree Manager documentation for a full, detailed discussion on using the PeopleSoft Tree Manager before you attempt to modify or create your own Position Trees. This section discusses using the Tree Manager to define and maintain Position Trees in PeopleSoft Human Resources and is by no means an exhaustive or even thorough discussion on the use of the Tree Manager.

If you want to represent a portion of your organizational structure graphically, you can create position hierarchies in the Tree Manager. You'll find the Tree Manager helpful because 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 especially useful for “what-if” scenarios in organizational planning. For planning at the department level, you can create a position tree with just the positions in a particular department.

From within 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, you just click on a position number with your mouse and you'll bring up the Position Data pages.

We recommend 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, you should generate the report, POS006, to manage and view reporting hierarchies in your organization.

For more information about using Tree Manager, see Tree Manager.

Tree Terminology

Before you begin creating a position tree, you should familiarize yourself with the terms used with the Tree Manager:

Level	A logical division in the tree hierarchy. Examples include department, branch, region, or company. You can create as many levels on a tree as you need to define your hierarchy.
Node	An individual branch representing a position or group of positions in a tree.
Parent	A node that has other nodes reporting to it. Parent nodes are divided into child nodes.

Sibling	Nodes at the same level that are subsets of the same parent node.
Child	A node that is a subset of a parent node.

Building Position Trees

You build position trees in the PeopleSoft Tree Manager. To access Tree Manager, logon to the PeopleTools window client and select Tree Manager.

When you create a position tree, you will:

- Reviewing the Tree Structure in the Tree Structure Properties Dialog Box—identify the page definitions, record definitions and fields for the underlying database tables where tree data will be stored.
- Defining Your Tree.
- Specifying Organizational Levels, if you choose to use them.
- Adding positions.

Reviewing the Tree Structure in the Tree Structure Properties Dialog Box

The tree structure identifies the menus, pages, records, and fields in PeopleSoft HRMS that you access or update while building your tree. You should use this same structure for any additional position trees you create. Unless you're modifying the system extensively, you rarely change this information.

To review the Tree Structure Table:

1. Select Structure, Open. The system displays the Structure ID page.
2. Select Position and click Open.

Defining Your Tree

Use the New Tree Definition Properties page to specify the database keys. These are the fields that uniquely identify each tree, among other things. You can have multiple trees active at any one time, but they must each have a different SetID.

To open the Tree Definition page for a new tree definition:

1. Select File, New. The system displays the New Tree Definition component.
2. In the Structure page, enter the following information:
   a. Enter Position in the Structure ID field. The system will hide the SetID field when you do this.

b. Enter a Tree Name to identify the tree in tables, list boxes, and reports. Once your tree is defined, the tree name will appear in the Tree Manager title bar, at the top of the page just below the menu bar.

c. Indicate the Effective Date of the tree. You can create a number of versions of the tree with different effective dates, whether past, present, or future.

d. In the Description field, specify a name or caption for the tree. Since you can specify many trees with the similar names, the description field is useful for distinguishing among them.

e. Enter a tree structure category.

3. In the Properties page, enter the following information:

a. In the Status field, indicate if the tree is Active or Inactive.

b. Leave the All Detail Values in This Tree check box clear. Position trees don't require detail values.

c. Leave the Allow Duplicate Detail Values check box clear. Position trees don't require detail values.

4. Select the appropriate Use of Levels for your particular tree on the Levels page.

With position trees, you don’t have to use levels, though they can be helpful for setting up management hierarchies, particularly for succession planning. However, depending on the area of your company for which you're building a tree, you may choose not to use levels.

For more information about identifying tree levels, see the Tree Manager documentation.

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5. You don't need to change the default information in the Access Performance Methods page.

6. Once you’ve completed your tree definition, click OK. The system opens the Tree Manager window where the Tree Name and the Effective Date of the tree display in the title bar. Together these fields form a key that identifies each unique version of a tree.

Specifying Organizational Levels

Once you define your tree, you can enter the levels and nodes that represent a position hierarchy. Levels help determine how nodes (positions) are organized on a tree. You don’t have to use levels in your position tree. You might find they are useful for only a portion of your organization, such as the managerial levels you’ll review in succession planning.

If levels already exist, highlight the level above the point where you want to insert your new level and click on the Add button. Each level is added after the currently highlighted level.

To add or edit level information:

1. Open your tree and select Edit, Levels. The system opens the Edit Level Information page.
2. To add a level, click Add. To edit information about the level, click User Data. To change the name of a level, click Tree Data.
3. When you click Add, the system opens the Tree Level page.

To add levels on the Tree Level page:

1. Enter a name for the new level in the Level Name field.
2. Select the All Values check box to ensure that all nodes at lower levels report to this level. Leave the check box clear to enable nodes to skip this level and report to a higher level.

   You want to leave this check box clear if some of your positions report directly to a higher level and not any of the intermediate levels. This check box is unavailable for entry when you're adding the first level (top level) for this tree. The check box becomes irrelevant because there aren't any levels above the top level.
3. Click OK when you're done.

   The system displays the level description page. Enter the following information on the tree level description page:

   a. Enter the date the level becomes effective in the Effective Date field. This date must be earlier or equal to the tree date in order to be available for use in that tree.

   b. Select the Status of the new level.

   c. Enter a Description of the level. If this Level Name has been used in other trees, the Description field defaults to the description already specified for this level. Changing the description here affects all trees using this level.

   d. Enter a Short Description of the level.

Editing a Level

To edit information about a level, select Levels from the Edit menu. On the Edit Level Information dialog box, click the User Data button. The system displays a Tree Manager page showing data related to the level as it appears in the Tree Level Table. The description won't appear in your tree, but it will appear in various prompt lists, such as when you insert nodes, to help you identify that level.

If your level name has been used in other trees, the Description field will default to the description already specified for that level name. Changing the description here will affect all trees using this level. You may return to this page to change the description at any time.

Deleting levels

To delete levels, select Clear from the Edit menu. You won't be able to delete levels that have nodes attached to them until you delete or move those nodes.

Adding positions

In a position tree, each node represents a position. The first node is known as the root node, and is the highest level in the hierarchy or reporting structure. You can only insert the root node using the Edit menu. Once the root has been planted, there are two ways to enter additional nodes:

- Using the Edit menu
- Using the Tool buttons

For more information about and instructions on adding root nodes to Trees using the Tree Manager, see Tree Manager documentation.

Adding an Existing Position to the Position Tree

To add an existing position (a position that you created earlier in PeopleSoft Human Resources) to the position tree go to the Edit menu and select Insert. Enter the position number in the dialog box that the system displays, including all the zeroes that precede the number. For example, to add Position 1, type ***00000001***. When you press OK, the system will add the node to the tree, without first bringing up the Position Data component.

Adding a New Position to the Position Tree

To add a new position to the position tree go to the Edit menu and select Insert. In the dialog box that the system displays, click on OK and the system will automatically assign a number. You can also elect to enter a position number manually. When you press OK, the system will display the Position Data component and you can enter data for this position using the five Position Data pages in the group.

The Position Data component displayed is accessed from the Tree Manager menu, but is linked to the Position Data component in the Develop Workforce, Manage Positions menu. You can use the Position Data pages the same way as you would if you accessed them from the Manage Positions menu. Bear in mind that the Reports To Posn field on Position Data - Description and the position tree aren't linked in the system. You must maintain them manually if you choose to use both for managing position hierarchies.

For more information about entering position data for new positions, see Setting Up Positions.

Whether you're adding an existing position to the tree or creating a new one, you can bring up the Position Data pages at any time by double-clicking on a position number.

For more information about changing the pages you access from the position tree, adding branches or modifying Trees, and using the PeopleSoft Tree Manager, see the Tree Manager documentation.

Using Managing Positions nVision Reports

PeopleSoft Human Resources provides one nVision report that you can use to view, summarize, and analyze your organizational position data. In this section we provide a description of the report.

For more information about setting your system up to run nVision reports see PeopleSoft nVision.

Managing Positions nVision Reports doesn't apply to PeopleSoft HRMS for Education and Government users.

Comparing Approved, Filled and Budgeted Positions by Department

The Filled/Approved Positions By Department report 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.

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.

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 scroll down to this same page. Use this page to review and analyze detailed status information for individual Approved Head Count within a Department.

For each Job Code category within an individual **Department,** the report shows the Description (Job Title), Job Code, Status, Maximum number of positions, and whether they are Budgeted.

Viewing Status Information for Actual Headcount in a Department

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

For each Actual Head Count within a **Department** the report shows the Position number, the Name of the employee, their **Job Code** and EmplID.

CHAPTER 5

Running Position Management Reports

This chapter explains how to generate PeopleSoft Position Management reports and details the output results of those reports. Position Management reports provide information on position data and incumbent job related data. You'll find these reports useful for organizational planning, budgeting, and checking for discrepancies between employee data and position data.

USF USF-only reports are listed at the end of the chapter. For all other reports, assume that the report details are the same for the USF report, unless otherwise indicated. If the report is not used by USF at all, it will be noted.

For more information on generating these reports see Introduction to PeopleSoft Reporting. **For a complete alphabetical listing** of all PeopleSoft HRMS reports see List of Reports in PeopleSoft Human Resources.

Common Run Control Pages for Position Management Reports

Under the **Manage Positions, Report** menu in PeopleSoft Position Management, you'll find several variations of the same page. The object page name (RUNCTL_ASOFDATE, RUNCTL_FGASOFDT, PRCSRUNCNTL, and RUNCTL_POSN_NBR) remains the same throughout, as do the fields; however, the actual names of the page and the reports produced vary depending on the business process.

RUNCTL_ASOFDATE Report Run Control Page

The RUNCTL_ASOFDATE Report Run Control page is documented in Common PeopleSoft HRMS Report Run Control Pages. Use the RUNCTL_ASOFDATE page to run the following reports:

- Position Status report
- Active Position History report
- Build Position Structure report

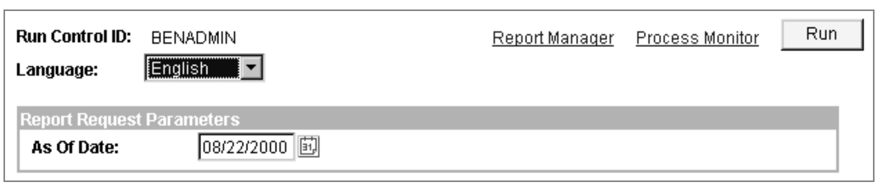
PRCSRUNCNTL Report Run Control Page

The PRCSRUNCNTL Report Run Control page is documented in Common PeopleSoft HRMS Report Run Control Pages. Use the RUNCTL_ASOFDATE page to run the following reports:

- Vacant Position report
- Occupation Series report
- Position Title Table report

RUNCTL_FGASOFDT Report Run Control Page

Object Name	RUNCTL_FGASOFDT
Navigation	• **Develop Workforce, Manage Positions (USF), Report, Active Position History, Active Position History** • **Develop Workforce, Manage Positions (USF), Report, Incumbent History, Incumbent History** • **Develop Workforce, Manage Positions (USF), Report, Job Code/Position Audit Rpt, Parameters**
Access Requirements	Enter a Run Control ID.



RUNCTL_FGASOFDT page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID, Language,** and **As Of Date.**

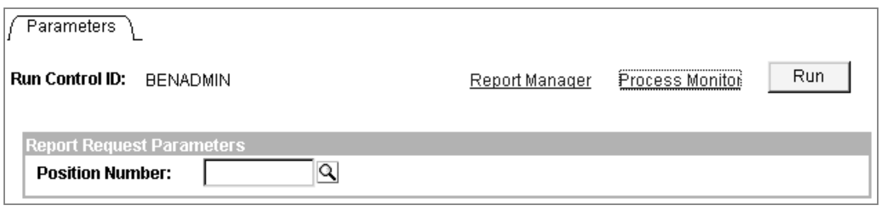
List of Reports that Use the RUNCTL_FGASOFDT Page

Use the RUNCTL_FGASOFDT page to run the following reports:

- Incumbent History report for USF
- Active Position History report for USF
- Job Code/Position Audit Rpt for USF

RUNCTL_POSN_NBR Report Run Control Page

Description	Use this run control page to run two USF Position Management reports.
Object Name	RUNCTL_POSN_NBR
Navigation	• **Develop Workforce, Manage Positions (USF), Report, Complete Position Description, Parameters** • **Develop Workforce, Manage Positions (USF), Report, Job Code Text, Parameters** • **Develop Workforce, Manage Positions (USF), Report, Position Summary Report, Parameters**
Access Requirements	Enter a Run Control ID.



Parameters page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID.**

Position Number Select the **Position Number** of the position you would like to report on.

List of Reports that Use the RUNCTL_POSN_NBR Page

Use the RUNCTL_POSN_NBR page to run the following reports:

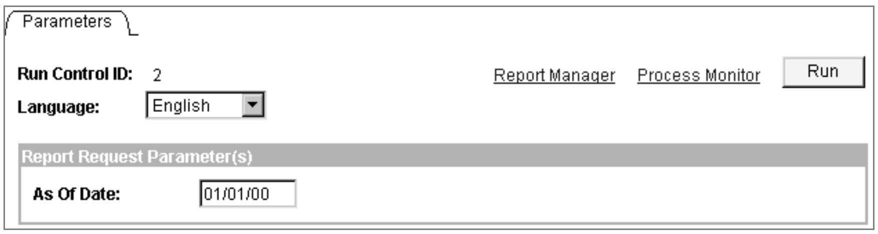
- USF Position Summary report
- USF Job Code Text report
- USF Complete Position Description report

Generating the Active Position History Report

The Active Position History report lists all current and historical data related to a position, for all active positions in the organization. The report lists information on each active position, including its effective date, the associated action reason, title, reporting hierarchy, and location.

Parameters Page

Usage	Use this run control page to run the Active Position History report.
Navigation	**Develop Workforce, Manage Positions, Reports, Active Position History**
Access Requirements	Enter a Run Control ID.



Parameters page

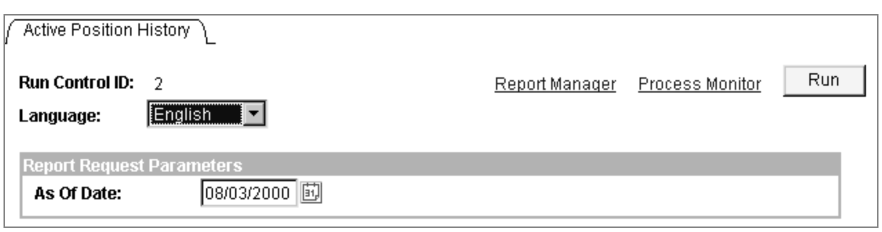
The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID. Language, As Of Date.**

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

USF Active Position History Page

Usage	Use this run control page to run the Active Position History report.
Navigation	**Develop Workforce, Manage Positions (USF), Reports, Active Position History**
Access Requirements	Enter a Run Control ID.



Active Position History page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID. Language, As Of Date.**

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

Active Position History Report

Description	The Active Position History report lists all current and historical data related to a position, for all active positions in the organization. The report lists information on each active position, including its effective date, the associated action reason, title, reporting hierarchy, and location.
Report ID	POS004
Type of Report	SQR
Parameters	As of Date
Source	RUNCTL_ASOFDATE
Source Records	POSITION_DATA
Sort By	Position Number, Effective Date

For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

USF Active Position History Report

Description	The Active Position History report lists all current and historical data related to a position, for all active positions in the organization. The report lists information on each active position, including its effective date, the associated action reason, title, reporting hierarchy, and location.
Report ID	FGHR027

Type of Report	SQR
Parameters	As of Date
Source	RUNCTL_FGASOFDT
Source Records	POSITION_DATA
Sort By	Position Number, Effective Date

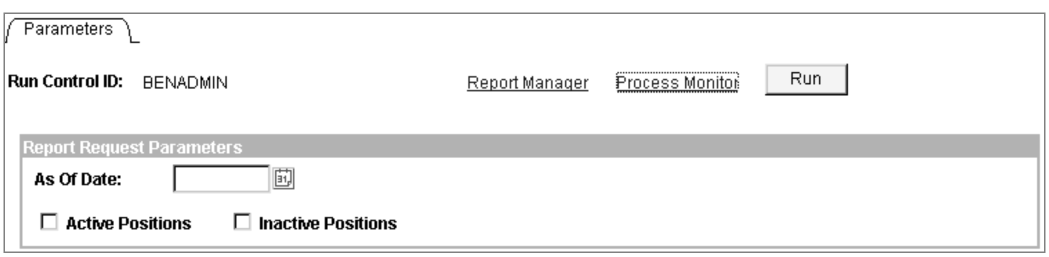
For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

Generating the Active/Inactive Positions Report

This report lists the current position-related data for active positions, inactive positions, or both, depending on which you select to run. Inactive positions appear with an ***I*** in the Position Status column.

Parameters Page

Usage	Use the Active/Inactive Positions report page to run a report on the active, inactive, or both, positions in your organization.
Object Name	RUNCTL_POS002
Navigation	**Develop Workforce, Manage Positions, Report, Active/Inactive Positions, Parameters**
Access Requirements	Enter a Run Control ID in the search dialog box.



Parameters page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID, As Of Date.**

Active Positions Select the **Active Positions** check box if you want to report on the active positions in your organization.

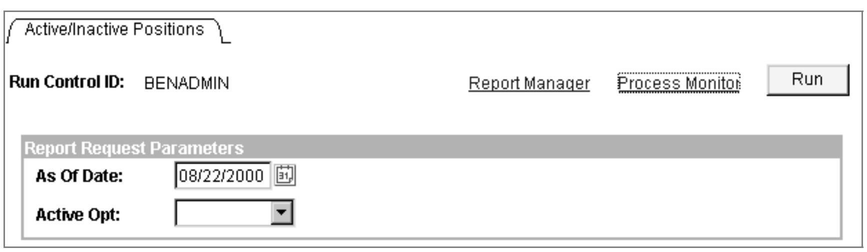
Inactive Positions Select the **Inactive Positions** check box if you want to report on the inactive positions your organization.

Click **Run** to run this request. Process Scheduler runs the Active/Inactive Positions process at user-defined intervals.

For more information about Process Scheduler, see Process Scheduler.

USF Active/Inactive Positions Page

Usage	Use the Active/Inactive Positions report page to run a report on the active, inactive, or both, positions in your organization.
Object Name	RUNCTL_FGHR025
Navigation	**Develop Workforce, Manage Positions (USF), Report, Active/Inactive Positions, Active/Inactive Positions**
Access Requirements	Enter a Run Control ID in the search dialog box.



Active/Inactive Positions page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID, As Of Date.**

Active Opt Select one of the following options in the **Active Opt** field.

Select ***Active*** to report only on active positions.

Select ***Both*** to report on both active and inactive positions.

Select ***Inactive*** to report only on inactive positions.

Click **Run** to run this request. Process Scheduler runs the Active/Inactive Positions process at user-defined intervals.

For more information about Process Scheduler, see Process Scheduler.

Active/Inactive Positions Report

Description	The Active/Inactive Position report reports on either inactive or active positions, or both. The report lists information by business unit department, job code position status, maximum head count, location, and whether the position is included in the departmental budget.
Report ID	POS002
Type of Report	Crystal
Parameters	As of Date, Status as of Effective Date
Source	RUNCTL_POS002
Source Records	POSITION_DATA, POSITION_SRCH
Sort By	Business Unit, DeptID, Job Code, Position Number

For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

USF Active/Inactive Positions Report

Description	The Active/Inactive Position report reports on either inactive or active positions, or both. The report lists information by business unit department, job code position status, maximum head count, location, and whether the position is included in the departmental budget.
Report ID	FGHR025
Type of Report	Crystal
Parameters	As of Date, Status as of Effective Date.
Source	RUNCTL_FGHR025

Source Records	POSITION_DATA, POSITION_SRCH
Sort By	Business Unit, DeptID, Job Code, Position Number

For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

Generating the Build Position Structure Report

Once you enter all the reporting relationships among positions in the Position Data component you'll run this SQR. The Build Position Structure report enters a value in the ORG_CODE field and defines the position in the hierarchy. When you run the Build Position Structure report the system will update the position structure with data valid before or on the As of Date you specify.

You'll find this SQR in the Report menu. You should run this utility when you first enter the reporting relationships, any time you add new positions, and when you change reporting relationships among existing positions. You must run this SQR before you can run the Indented Position Hierarchy report, POS006.

When you run Build Position Structure, the system may generate one or more diagnostic messages to help you understand the utility output. They are as follows:

1. If the utility doesn't find a root position (a position that reports to itself), it will display an error message. If you don't have a root node, the utility can't produce a report.

2. If you have circular reporting conditions, such as when position 1 reports to position 2, and position 2 reports to position 1, the utility will display a warning message and the positions won't appear in the report.

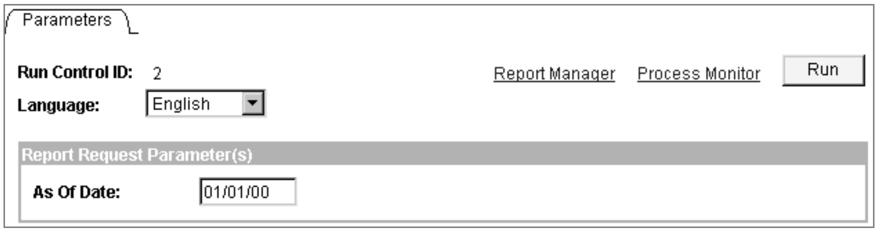
3. If you don't have data in the Reports To Position field for a position, the utility will display a warning message. These positions won't appear in the report.

For more information about position hierarchies, see Maximizing Position Data.

Parameters Page

Usage	Use this run control page to run the Build Position Structure report.
Navigation	**Develop Workforce, Manage Positions, Reports, Build Position Structure**

Access Requirements	Enter a Run Control ID.



Parameters page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID. Language, As Of Date.**

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

Build Position Structure Report

Description	The Build Position Structure utility links the positions in the system and creates the reporting hierarchy represented in the Indented Position Report.
Report ID	POS006A
Type of Report	SQR
Parameters	As of Date
Source	RUNCTL_ASOFDATE
Source Records	POSITION_DATA
Sort By	Position Number

For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

Generating the Exception/Override Report

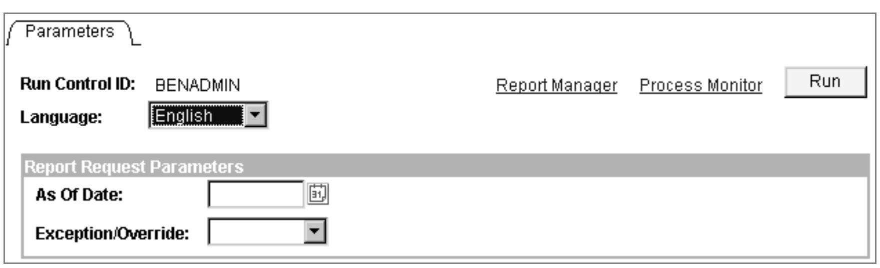
The Exception/Override report audits the data in fields that match in the Position Data component and the current incumbent Job Data component. You can choose to print incumbent job data where you have prevented automatic cross-updating from occurring (overrides), or you can print only exceptions where the incumbent job and position data is out of sync for other reasons (exceptions).

The Exception/Override report lists the position name and the name of the employee assigned to the position and shows the data in the fields that match in the Position Data component and Job Data component. The report displays those employees whose Employee Status is ***Active***, ***Leave of Absence***, ***Suspended***, or ***Leave with Pay.***

When you run this report for exceptions and the Business Title in the incumbent Employment Data doesn't match the Position Title in Position Data, the report prints an asterisk (*) next to the Position Title. The report also prints ***Match*** or ***No Match*** in the Mail Drop column, depending on whether the data is the same in the incumbent job and position data.

Parameters Page

Usage	Use the Exception/Override report page to run a report to audit the data in fields that match in the Position Data component and the current incumbent Job Data component.
Object Name	RUNCTL_POS008
Navigation	**Develop Workforce, Manage Positions, Report, Exception/Override Report, Parameters**
Access Requirements	Enter a Run Control ID in the search dialog box.



Parameters page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID, Language, As Of Date.**

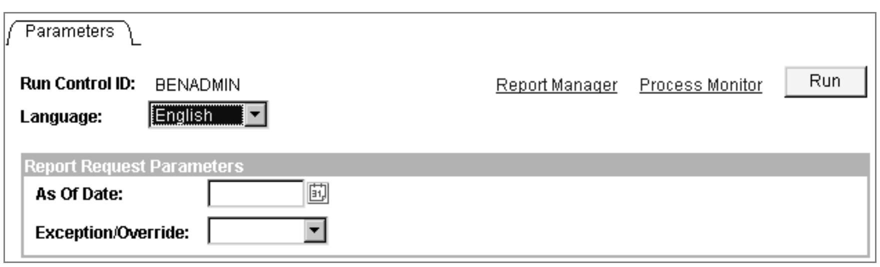
Exception/Override Indicate if you want to run an ***Exception*** or ***Override*** report. When you select ***Override*** the report will print incumbent job data where you have prevented automatic cross updating from occurring. When you select ***Exception***, the report will print only exceptions where the incumbent job and position data is out of sync for other reasons.

Click **Run** to run this request. Process Scheduler runs the Exception/Override Report process at user-defined intervals.

For more information about Process Scheduler, see Process Scheduler.

USF Parameters Page

Usage	Use the Exception/Override report page to run a report to audit the data in fields that match in the Position Data component and the current incumbent Job Data component.
Object Name	RUNCTL_FGHR028
Navigation	**Develop Workforce, Manage Positions (USF), Report, Exception/Override Report, Exception Override Report**
Access Requirements	Enter a Run Control ID in the search dialog box.



Parameters page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID, Language, As Of Date.**

Exception/Override Indicate if you want to run an ***Exception*** or ***Override*** report. When you select ***Override*** the report will print incumbent job data where you have prevented automatic cross updating from occurring. When you select ***Exception***, the report will print only exceptions where the incumbent job and position data is out of sync for other reasons.

Click **Run** to run this request. Process Scheduler runs the Exception/Override Report process at user-defined intervals.

For more information about Process Scheduler, see Process Scheduler.

Exception/Override Report

Description	The Exception/Override report audits the data in fields that match in the Position Data component and the current incumbent Job Data component. You can choose to print incumbent job data where you have prevented automatic cross updating from occurring (overrides), or you can print only exceptions where the incumbent job and position data is out of sync for other reasons (exceptions). The Exception/Override report lists the position name and the name of the employee assigned to the position and shows the data in the fields that match in the Position Data component and Job Data component. The report displays those employees whose Employee Status is ***Active***, ***Leave of Absence***, ***Suspended***, or ***Leave with Pay.*** When you run this report for exceptions and the Business Title in the incumbent Employment Data doesn't match the Position Title in Position Data, the report prints an asterisk (*) next to the Position Title. The report also prints ***Match*** or ***No Match*** in the Mail Drop column, depending on whether the data is the same in the incumbent job and position data.
Report ID	POS008
Type of Report	SQR
Parameters	As of Date, Exception or Override.
Source	RUNCTL_POS008
Source Records	EMPLOYMENT, JOB, JOBCODE_TBL, PERSONAL_DATA, POSITION_DATA
Sort By	Department, Position, Effective Date

For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

USF Exception/Override Report

Description	The Exception/Override report audits the data in fields that match in the Position Data component and the current incumbent Job Data component. You can choose to print incumbent job data where you have prevented automatic cross updating from occurring (overrides), or you can print only exceptions where the incumbent job and position data is out of sync for other reasons (exceptions). The Exception/Override report lists the position name and the name of the employee assigned to the position and shows the data in the fields that match in the Position Data component and Job Data component. The report displays those employees whose Employee Status is ***Active***, ***Leave of Absence***, ***Suspended***, or ***Leave with Pay.*** When you run this report for exceptions and the Business Title in the incumbent Employment Data doesn't match the Position Title in Position Data, the report prints an asterisk (*) next to the Position Title. The report also prints ***Match*** or ***No Match*** in the Mail Drop column, depending on whether the data is the same in the incumbent job and position data.
Report ID	FGHR028
Type of Report	SQR
Parameters	As of Date, Exception or Override
Source	RUNCTL_FGHR028
Source Records	EMPLOYMENT, JOB, JOBCODE_TBL, PERSONAL_DATA, POSITION_DATA
Sort By	Department, Position, Effective Date

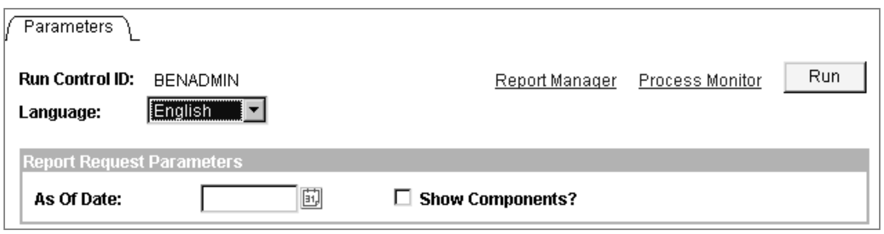
For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

Generating the Incumbent History Report

The Incumbent History report shows, by position, all current and former incumbents (employees who have held a position) in the organization, beginning with the current incumbent for each position and going back in time. This report prints entry and exit dates for each incumbent, as well as starting and ending salaries.

Parameters Page

Usage	Use the Incumbent History report page to run a report on the current and former position incumbents in your organization.
Object Name	RUNCTL_ASOFDT_COMP
Navigation	**Develop Workforce, Manage Positions, Report, Incumbent History, Parameters**
Access Requirements	Enter a Run Control ID in the search dialog box.



Parameters page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID, Language, As Of Date.**

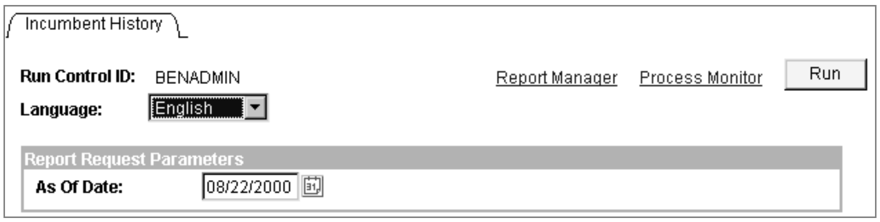
Show Components? Select the **Show Components?** check box if you want the report to display compensation component information for each incumbent.

Click **Run** to run this request. Process Scheduler runs the Incumbent History process at user-defined intervals.

For more information about Process Scheduler, see Process Scheduler.

USF Incumbent History Page

Usage	Use this run control page to run the Incumbent History report.
Navigation	**Develop Workforce, Manage Positions (USF), Reports, Incumbent History**
Access Requirements	Enter a Run Control ID.



Incumbent History page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID. Language, As Of Date.**

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

Incumbent History Report

Description	The Incumbent History report shows, by position, all current and former incumbents (employees who have held a position) in the organization, beginning with the current incumbent for each position and going back in time. This report prints entry and exit dates for each incumbent, as well as starting and ending salaries.
Report ID	POS003
Type of Report	SQR
Parameters	As of Date
Source	RUNCTL_ASOFDT_COMP
Source Records	JOBCODE_TBL, PERSONAL_DATA, POSITION_DATA, POSN_HISTORY, POSN_HISTORY2, POSN_HISTORY3
Sort By	Company, Department, Job Code, Position Number, Incumbent Position Entry Date

For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

USF Incumbent History Report

Description	The Incumbent History report shows, by position, all current and former incumbents (employees who have held a position) in the organization, beginning with the current incumbent for each position and going back in time. This report prints entry and exit dates for each incumbent, as well as starting and ending salaries.
Report ID	FGHR026
Type of Report	SQR
Parameters	As of Date
Source	RUNCTL_FGASOFDT
Source Records	JOBCODE_TBL, PERSONAL_DATA, POSITION_DATA, POSN_HISTORY, POSN_HISTORY2, POSN_HISTORY3
Sort By	Agency, Department, Job Code, Position Number, Incumbent Position Entry Date

For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

Generating the Indented Position Report

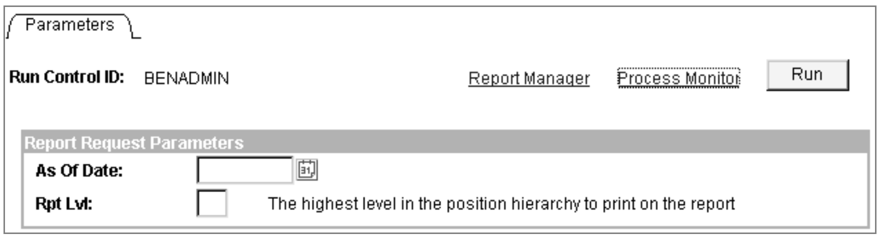
The Indented Position Report provides a visual representation of reporting relationships among positions by level, if any, in the organization, and includes the current incumbent names for each position.

Before you can run this report, you'll need to run the utility Build Position Structure, which links the positions in the system and creates the reporting hierarchy represented in this report.

Parameters Page

Usage	Use the Indented Position report page to run a report creating a visual representation of the reporting relationships in your organization.

Object Name	RUNCTL_POS006
Navigation	• **Develop Workforce, Manage Positions, Report, Indented Position Report, Parameters** • **Develop Workforce, Manage Positions (USF), Report, Indented Position Report, Parameters**
Prerequisites	Build Position Structure report
Access Requirements	Enter a Run Control ID in the search dialog box.



Parameters page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID, As Of Date.**

Rpt Lvl (report level) Enter the highest report level you want reported on. For example, if you have 10 report levels and you only want to report on the bottom 5, enter 5 in the Rpt Lvl field.

Click **Run** to run this request. Process Scheduler runs the Indented Position Report process at user-defined intervals.

For more information about Process Scheduler, see Process Scheduler.

Indented Position Report

Description	The Indented Position Report provides a visual representation of reporting relationships among positions by level, if any, in the organization, and includes the current incumbent names for each position. Before you can run this report, you'll need to run the utility Build Position Structure, which links the positions in the system and creates the reporting hierarchy represented in this report.
Report ID	POS006
Type of Report	SQR

Parameters	As of Date, Report Level
Source	RUNCNTL_POS006
Source Records	JOB, POSITION_DATA
Sort By	Position Number

For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

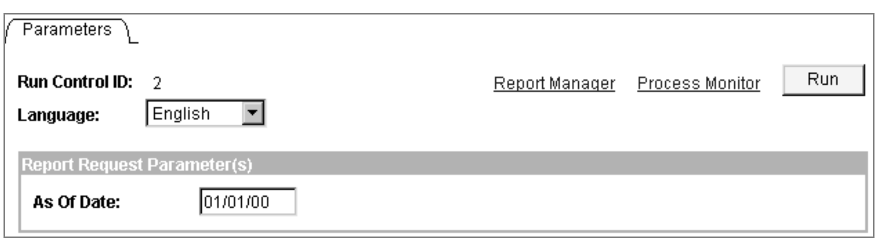
Generating the Position Status Report

The Position Status report inventories the types of positions in your organization, and lists all filled and vacant positions.

Federal users don't use this report.

Parameters Page

Usage	Use this run control page to run the Position Status report.
Navigation	**Develop Workforce, Manage Positions, Reports, Position Status**
Access Requirements	Enter a Run Control ID.



Parameters page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID. Language, As Of Date.**

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

Position Status Report

Description	The Position Status report inventories the types of positions in your organization, and lists all filled and vacant positions. The report captures information about positions, including: Department ID, Job Code, Position Number, Effective Date, Description, Reg/Temp, Confidential Position status, Position Status, Status Date, Internal and External Posting Dates, and the name of the incumbent or incumbents.
Report ID	POS001
Type of Report	SQR
Parameters	As of Date
Source	RUNCTL_ASOFDATE
Source Records	EMPLOYMENT, JOB, JOBCODE_TBL, JOB_REQUISITION, JOB_REQUIS_TYP, PERSONAL_DATA, POSITION_DATA
Sort By	DeptID, Job Code, Position Number

For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

Generating the Vacant Position Report

The Vacant Position Report lists all currently vacant budgeted positions in the organization.

Run Control Page

Usage	Use this run control page to run the Vacant Position Report.
Navigation	**Develop Workforce, Manage Positions, Reports, Vacant Position Report**
Access Requirements	Enter a Run Control ID.

Run Control page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID.**

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

USF Run Control Page

Usage	Use the Vacant Position page to run a report listing all currently vacant budgeted positions in your organization.
Object Name	RUNCTL_FGHR010
Navigation	**Develop Workforce, Manage Positions (USF), Report, Vacant Position Report, Vacant Position Report**
Access Requirements	Enter a Run Control ID in the search dialog box.

Vacant Position Report page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID.**

Click **Run** to run this request. Process Scheduler runs the Vacant Position Report process at user-defined intervals.

For more information about Process Scheduler, see Process Scheduler.

Vacant Position Report

Description	The Vacant Position Report provides a list of all currently vacant, budgeted positions in your organization.
Report ID	POS007
Type of Report	Crystal
Parameters	None
Source	PRCSRUNCNTL
Source Records	POSN_VACANT, DEPARTMENT_SRCH
Sort By	DeptID, Job Code, Position Number

For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

USF Vacant Position Report

Description	The Vacant Position Report provides a list of all currently vacant, budgeted positions in your organization.
Report ID	FGHR010
Type of Report	Crystal
Parameters	None
Source	RUNCTL_FGHR010
Source Records	POSN_VACANT, DEPARTMENT_SRCH
Sort By	DeptID, Job Code, Position Number

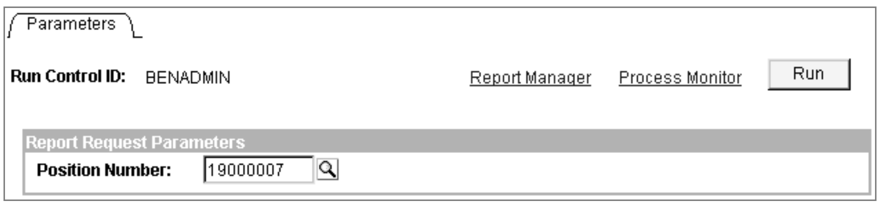
For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

Generating the USF Complete Position Description Report

The Complete Position Description report prints a complete description of a selected position.

USF Parameters Page

Usage	Use this run control page to run the Complete Position Description report.
Navigation	**Develop Workforce, Manage Positions (USF), Complete Position Description**
Access Requirements	Enter a Run Control ID.



Parameters page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID.**

Position Number Select the **Position Number** of the position you would like to report on.

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

USF Complete Position Description Report

Description	Prints a complete description of the position.
Report ID	FGPOS819, FGPOS818
Type of Report	Crystal
Parameters	Position Number
Source	RUNCTL_POSN_NBR

Source Records	POSITION_DATA, JOBCODE_TBL, DEPT_TBL, LOCATION_TBL, GVT_SUBAGCY_TBL
Sort By	None

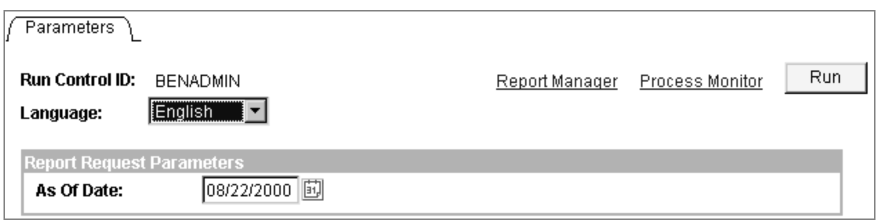
For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

Generating the USF Job Code/Position Audit Report

The Job Code/Position Audit report cross references position numbers and job codes.

USF Parameters Page

Usage	Use this run control page to run the Job Code/Position Audit report.
Navigation	**Develop Workforce, Manage Positions (USF), Reports, Job Code/Position Audit Rpt**
Access Requirements	Enter a Run Control ID.



Parameters page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID. Language, As Of Date.**

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

USF Job Code/Position Audit Report

Description	The Job Code/Position Audit report cross references position numbers and job codes.
Report ID	FGHR009
Type of Report	SQR
Parameters	As of Date
Optional Parameters	Agency, Sub Agency, Job Code, Pay Plan, OCC Series, Pay Grade, Supervisory Level
Source	RUNCTL_FGASOFDT
Source Records	POSITION_DATA, JOB_CODE
Sort By	Job Code

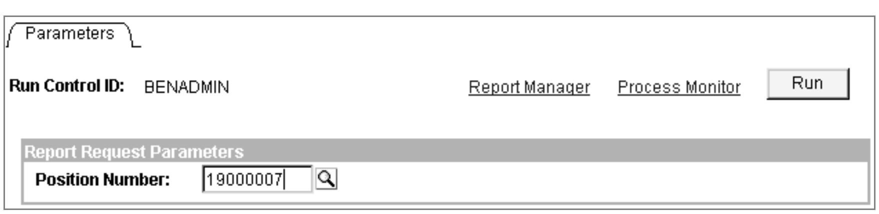
For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

Generating the USF Job Code Text Report

The Job Code Text report prints the job code text associated with a position and includes the duties, knowledge required by the position, supervisory controls, guidelines, complexity, scope and effect, physical demands, and work environment specifications for a position number.

USF Parameters Page

Usage	Use this run control page to run the Job Code Text report.
Navigation	**Develop Workforce, Manage Positions (USF), Job Code Text**
Access Requirements	Enter a Run Control ID.



Parameters page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID.**

Position Number	Select the **Position Number** of the position you would like to report on.

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

USF Job Code Text Report

Description	The Job Code Text report prints the job code text associated with a position and includes the duties, knowledge required by the position, supervisory controls, guidelines, complexity, scope and effect, physical demands, and work environment specifications for a position number.
Report ID	FGPOS819
Type of Report	Crystal
Parameters	Position Number
Source	RUNCTL_POSN_NBR
Source Records	POSITION_DATA, JOBCODE_TBL, DEPT_TBL, LOCATION_TBL, GVT_SUBAGCY_TBL
Sort By	None

For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

Generating the USF Occupation Series Report

The Occupation Series report generates a listing of the Occupational Series table records.

USF Parameters Page

Usage	Use this run control page to run the Occupation Series Table report.

Navigation	**Develop Workforce, Manage Positions, Reports, Occupation Series Table**
Access Requirements	Enter a Run Control ID.

Run Control page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID.**

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

USF Occupation Series Report

Description	The Occupation Series report provides the details of the Occupational Series table.
Report ID	FGOCC800
Type of Report	Crystal
Parameters	None
Source	PRCSRUNCNTL
Source Records	GVT_OCCUPATION_TBL
Sort By	Occupation Series, Effective Date

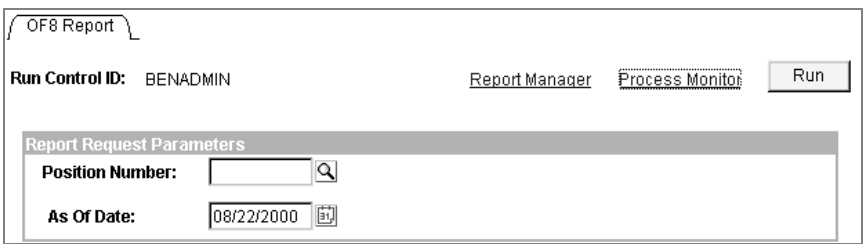
For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

Generating the USF OF8 Report

The 0F8 report establishes or creates changes to an existing position. This optional form provides a standardized mechanism to identify position information such as title, occupational series, grade, organizational structure, certification blocks, and other position related information.

USF OF8 Report Page

Usage	Use the OF8 page to run the OF8 report.
Object Name	RUNCTL_FGOF8
Navigation	**Develop Workforce, Manage Positions (USF), Report, OF8 Report, OF8 Report**
Access Requirements	Enter a Run Control ID.



0F8 Report page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID, As Of Date.**

Position Number Select the **Position Number** of the position you would like to report on.

USF 0F8 Report

Description	The 0F8 report establishes or creates changes to an existing position. This optional form provides a standardized mechanism to identify position information such as title, occupational series, grade, organizational structure, certification blocks, and other position related information.
Report ID	FG0F8
Type of Report	SQR
Parameters	Position Number, As of Date
Source	RUNCTL_FGOF8

Source Records	PS_GVT_POS_DES_TBL, PS_POSITION_DATA, PS_JOBCODE_TBL, PS_PERSONAL_DATA, PS_JOB, PS_DEPT_TBL, PS_AGENCY_TBL, PS_GVT_SUBAGCY_TBL, PS_LOCATION_TBL
Sort By	None

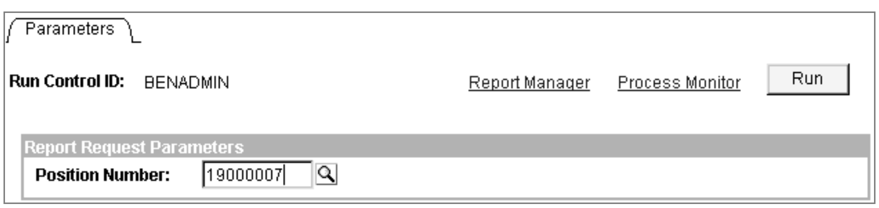
For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

Generating USF Position Summary Report

The Position Summary report produces a hard-copy replica of the Position Data Summary component.

USF Parameters Page

Usage	Use this run control page to run the Position Summary Report.
Navigation	**Develop Workforce, Manage Positions (USF), Position Summary Report**
Access Requirements	Enter a Run Control ID.



Parameters page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID.**

Position Number Select the **Position Number** of the position you would like to report on.

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

USF Position Summary Report

Description	The Position Summary report produces a hard-copy replica of the Position Data Summary component.
Report ID	FGPOS818
Type of Report	Crystal
Parameters	Position Number
Source	RUNCTL_POSN_NBR
Source Records	POSITION_DATA, JOBCODE_TBL, DEPT_TBL, LOCATION_TBL, GVT_SUBAGCY_TBL
Sort By	None

For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

Generating the USF Position Title Table Report

The Position Title Table report generates a listing of the Position Title Table records.

USF Parameters Page

Usage	Use this run control page to run the Position Title Table report.
Navigation	**Develop Workforce, Manage Positions, Reports, Position Title Table**
Access Requirements	Enter a Run Control ID.

Run Control page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID.**

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

USF Position Title Table Report

Description	The Position Title Table report generates a listing of the Position Title Table records.
Report ID	FGPER815
Type of Report	Crystal
Parameters	None
Source	PRCSRUNCNTL
Source Records	POSITION_DATA
Sort By	Occupational Series, Position Title Code, Effective Date

For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

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