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PeopleSoft HR 9.1 PeopleBook: Manage Positions

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PeopleSoft HR 9.1 PeopleBook: Manage Positions
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PeopleSoft HR Manage Positions Preface

This preface discusses:

- PeopleSoft applications.

- PeopleSoft HCM application fundamentals.

PeopleSoft Applications

This PeopleBook refers to the following PeopleSoft application: PeopleSoft Human Resources (HR) Manage Positions.

PeopleSoft Enterprise HCM Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HCM Application Fundamentals PeopleBook.* Each PeopleSoft line of application has its own version of this documentation.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "PeopleSoft HCM Application Fundamentals Preface"

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.

- How to send PeopleSoft documentation comments and suggestions to Oracle.

- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.

- Understanding PeopleBook structure.

- Typographical conventions and visual cues used in PeopleBooks.

- ISO country codes and currency codes.

- PeopleBooks that are common across multiple applications.

- Common elements used in PeopleBooks.

- Navigating the PeopleBooks interface and searching the PeopleSoft online library.

- Displaying and printing screen shots and graphics in PeopleBooks.

- How to manage the locally installed PeopleSoft online library, including web site folders.

- Understanding documentation integration and how to integrate customized documentation into the library.

- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your
PeopleTools release.

Chapter 1

Getting Started with Manage Positions

This chapter provides an overview and discusses:

- Manage Positions integrations.

- Manage Positions implementation.

Manage Positions Overview

The Manage Positions business process helps you define Human Resources by position, rather than job or by employee.

With this application, you can:

- Create and track positions data and history.

- Process employee appointments by position.

- Maintain incumbent data.

- Budget for positions and departments.

- View incumbent, position, and budget histories.

Manage Positions Integrations

Human Resources integrates with all the PeopleSoft HCM applications, with other PeopleSoft applications, and with third-party applications.

Human Resources shared tables are available to many PeopleSoft HCM applications. In addition, data in many HR tables is available to any PeopleSoft application that is set up to subscribe to the published messages.

This documentation covers integration considerations in this PeopleBook.

Manage Positions Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Manage Positions also provides component interfaces to help you load data from your existing system into Manage Positions tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists the component that has a setup component interface:

Component	Component Interface	References
CI_POSITION_DATA	POSITION_DATA	See Chapter 3, "Setting Up Positions," Creating Positions, page 19.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation documentation, data models, business process maps, and troubleshooting guidelines.

See Also

PeopleSoft Global Payroll 9.1 PeopleBook, "PeopleSoft Global Payroll Preface"

PeopleTools 8.52: Component Interfaces PeopleBook

PeopleTools 8.52: Setup Manager PeopleBook

Chapter 2

Understanding Position Management

This chapter discusses:

- Use positions versus jobs to structure your human resources system.

- Decide when to use the Manage Positions business process.

Using Positions Versus Jobs to Structure Your HR System

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

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

Use positions to track details on a particular job in a particular department or location that usually have a one-to-one relationship with employees. When you structure your system by position, you attach data to the positions and move employees in and out of those positions. By focusing on the position, you can track information related to it, such as salary or standard hours, regardless of whether an employee holds the position. When the position is vacant you won't lose the common thread that binds the data together. Use data specific to each position as the basis for organizational planning, recruitment, career planning, and budgeting.

Deciding When To Use the HR Manage Positions Business Process

When deciding when to use the Manage Positions business process, consider the following:

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

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

- If both methods serve you well in different areas of your organization, you can choose to structure Human Resources by position for some departments or management levels and by employee for others. Human Resources enables you to use both by selecting a setting called *partial position management* to use both methods wherever they suit you.

Chapter 3

Setting Up Positions

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

- (USF) Set up occupation series classifications and standards.

- (USF) Set up position titles.

- Create positions.

- (USF) Run reports on position data and related tables.

- Assign employees to positions.

Understanding Positions

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

This section discusses how to:

- Set up tables.

- Manage position data.

- Manage position data security.

Setting Up Tables

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

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

- • Installation Table

  Note. In addition to the general application controls on the Installation table, you must select Position Management in order to engage the functionality across the application.

- • Department Table

- • Company Table

- • Job Code Table

- • Location Table (USF)

- • Sub-Agency Table (USF)

- • POI Table (USF)

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

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Installing PeopleSoft HCM"

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables"

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up Jobs"

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "(USF) Setting Up Human Resources Management Tables"

Managing Position Data

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

Note. If you override a default, the system carries the default forward when a new row is inserted.

When you change the department ID, job code, or location, the system will change the default values of the salary plan, grade, and step fields. The system uses the default salary plan from the source you enter last, from the department that's associated with a location, the location, or the job code, provided you associated salary plans with both locations and job codes. The system provides the default salary grade and step that is associated with the job code; however, grades and steps are not associated with a location.

When you change the Job Code,Department, or Location values, the system inserts new default values into select fields even if the fields are populated. Default field values are derived from the source codes and tables.

Updated Field	Defaulted Fields	Source Table
Job Code	Manager Level	Job Code Table: Manager Level

Updated Field	Defaulted Fields	Source Table
Job Code	Reg/Temp	Job Code Table: Regular/Temp
Job Code	Union Code	Job Code Table: Union Code
Job Code	Title	Job Code Table: Job Title
Job Code	Short Title	Job Code Table: Short Job Title
Job Code	Detailed Position Description	Job Code Table: Job Description
Department	Company	Department Table: Company
Department	Location	Department Table: Location
Department	Reports To	Department Table: Manager Position
Job Code	Service	Job Code Table: Service
Job Code	Rank	Job Code Table: Rank
Job Code Department Location	Salary Admin Plan	Job Code Table: Salary Admin Plan Location Table: Salary Admin Plan (when changing a location or department that is associated with a location)
Job Code	Grade	Job Code Table: Grade **Note.** The system only updates this field when the Include Salary Plan/Grade check box is selected on the Position Data – Description page.
Job Code	Step	Job Code Table: Step
Job Code Location	Standard Hours	Job Code Table: Standard Hours Salary Admin Plan Table: Standard Hours (when changing the location)
Job Code Location	Work Period	Job Code Table: Standard Work Period Salary Admin Plan Table: Work Period (when changing the location)
Job Code	Mon-Sun	Job Code Table: Standard Hours/5, populated as Mon-Fri
Job Code	(E&G) Calc Group (Flex Service)	Job Code Table: Service Calculation Group
Job Code	(USA) FLSA Status	Job Code Table: FLSA Status

Note. If you change the default values in the Job Code, Department, or Location components after creating the position, the system does not update the values in the Position Data component.

Updating Position Changes in the Job Data Component

Several fields in the Position Data component match fields in the Job Data component. When you modify information on the position data pages, the system can maintain matching fields in the position incumbent's job data record if:

• The position is active.

• You have selected the update incumbent option for the position.

• The incumbent's job data record does not have the Override Position Data option selected.

When you change fields in the Position Data component, the Update Incumbent process may run, thereby updating fields in the incumbent's job record.

Note. The system updates the Department Entry Date and Job Entry Dt fields with the position data's effective date.

Updated Field In Position Data Component	*Updated Field In Incumbent's Job Record*
Adds to FTE Actual	Adds to FTE Actual (E&G only)
Business Unit	Business Unit Department SetID Location SetID Salary SetID Jobcode SetID
Classified Indicator	Classified Indicator (E&G only)
Company	Company
Department	Department ID Department Entry Date
FLSA Status	FLSA Status
Full or Part Time	Full or Part Time
Grade	Grade
Jobcode	Jobcode Job Entry Dt

Updated Field In Position Data Component	Updated Field In Incumbent's Job Record
Location	Location
Reg/Temp	Reg/Temp
Regulatory Region	Regulatory Region Labor Agreement SetID
Reports to	Reports to
Salary Admin Plan	Salary Admin Plan
Standard Hours	Standard Hours
Shift	Shift
Step	Step
Union Code	Union Code
Work Period	Work Period

Note. The system only updates the Grade, Salary Admin Plan and the Step fields when a user selects the Include Salary Plan/Grade check box on the Position Data – Specific Information page.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Installing PeopleSoft HCM"

PeopleSoft HR 9.1 PeopleBook: Administer Workforce, "Increasing the Workforce"

PeopleSoft HR 9.1 PeopleBook: Administer Workforce, "Updating Person and Job Information"

PeopleSoft HR 9.1 PeopleBook: Administer Workforce, "(USF) Administering Personnel Action Requests"

PeopleSoft HR 9.1 PeopleBook: Administer Workforce, "(USF) Processing Personnel Action Requests"

Managing Position Data Security

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

• You won't create duplicate positions in the system, so the system won't issue lower level SQL errors when you create new positions.

• The system enables you to make departmental transfers.

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

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

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

1. In PeopleSoft Application Designer, access the POSITION_DATA component.

2. Highlight the DESCR field and select View PeopleCode.

3. For the POSITION_DATA component, select the Row Select PeopleCode.

4. Read the instructions for commenting the code out that restricts this situation.

5. Open the POSITION_DATA component Properties and change the search record for the Add action to POSITION_SRCH.

See Also

PeopleTools 8.52: PeopleSoft Application Designer Developers Guide

(USF) Setting Up Occupation Series Classifications and Standards

To set up occupational series classifications and standards, use the Occupational Series (GVT_OCCUPATION), Classification Standard Table, Classification Factor Table, Classification Level Table, and the Grade Conversion Table (GVT_CLASS_STD_TBL) components.

This section discusses how to:

• Define occupation series classifications.

• Define classification standards.

• Designate the Classification Standards' classification factors.

- Associate classification factor levels and points with classification factors.

- Enter grades and point ranges.

Pages Used to Set Up Occupation Series Classifications and Standards

Page Name	Definition Name	Navigation	Usage
Occupation Series USF	GVT_OCCUPATION	• Set Up HRMS, Product Related, Organizational Development, Occupational Series USF, Occupation Series USF • Organizational Development, Position Management, Define Position Data USF, Occupational Series USF, Occupation Series USF	Define the occupation series classifications.
Classification Standard Table	GVT_CLASS_STD_TBL	• Set Up HRMS, Product Related, Organizational Development, Classification Standards USF, Classification Standard Table • Organizational Development, Position Management, Define Position Data USF, Classification Standards USF, Classification Standard Table	Create classification standards by establishing a description and level for each type of classification.
Classification Factor Table	GVT_CLASS_FCTR_TBL	• Set Up HRMS, Product Related, Organizational Development, Classification Standards USF, Classification Factor Table • Organizational Development, Position Management, Define Position Data USF, Classification Standards USF, Classification Factor Table	Designate Classification Standards' classification factors.

Page Name	Definition Name	Navigation	Usage
Classification Level Table	GVT_CLASS_LVL_TBL	• Set Up HRMS, Product Related, Organizational Development, Classification Standards USF, Classification Level Table • Organizational Development, Position Management, Define Position Data USF, Classification Standards USF, Classification Level Table	Associate classification factor levels and points with classification factors.
Grade Conversion Table	GVT_CLASS_GRD_CNV	• Set Up HRMS, Product Related, Organizational Development, Classification Standards USF, Grade Conversion Table • Organizational Development, Position Management, Define Position Data USF, Classification Standards USF, Grade Conversion Table	Enter a grade and point range for each grade.

Defining Occupation Series Classifications

Access the Occupation Series USF page (Set Up HRMS, Product Related, Organizational Development, Occupational Series USF, Occupation Series USF).

Occupation Series USF page

PATCOB Code(professional, administrative, technical, clerical, other, blue collar code)	Select the PATCOB code that should be associated with this occupational series from the list of available options.
Functional Class Required	Select if a functional class is required for the position.

Defining Classification Standards

Access the Classification Standard Table page (Set Up HRMS, Product Related, Organizational Development, Classification Standards USF, Classification Standard Table).

Classification Standard Table page

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

Designating the Classification Standards' Classification Factors

Access the Classification Factor Table page (Set Up HRMS, Product Related, Organizational Development, Classification Standards USF, Classification Factor Table).

Classification Factor Table page

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

Associating Classification Factor Levels and Points with Classification Factors

Access the Classification Level Table page (Set Up HRMS, Product Related, Organizational Development, Classification Standards USF, Classification Level Table).

Classification Level Table page

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

Entering Grades and Point Ranges

Access the Grade Conversion Table page (Set Up HRMS, Product Related, Organizational Development, Classification Standards USF, Grade Conversion Table).

Grade Conversion Table page

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

(USF) Setting Up Position Titles

To set up position titles, use the Official Position Titles USF (GVT_PSN_TTL_TBL) and the Organizational
Posn Titles USF (GVT_ORG_PSN_TTL) components.

This section discusses how to:

• Set up official position titles.

• Set up official position titles (USF).

Note. 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.

Pages Used to Set Up Position Titles

Page Name	Definition Name	Navigation	Usage
Official Position Titles Official Position Titles USF	GVT_PSN_TTL_TBL	• Set Up HRMS, Product Related, Organizational Development, Official Position Titles, Official Position Titles • Organizational Development, Position Management, Define Position Data USF, Official Position Titles USF, Official Position Titles USF	Set up official position titles that will later be associated with positions. **Note.** Before using the page, set up Occupation Series classifications.
Organizational Posn Titles USF	GVT_ORG_PSN_TTL	• Set Up HRMS, Product Related, Organizational Development, Organizational Posn Titles USF, Organizational Posn Titles USF • Organizational Development, Position Management, Define Position Data USF, Organizational Posn Titles USF, Organizational Posn Titles USF	Set up organization position titles that will later be associated with positions. **Note.** Before using the page, set up Occupation Series classifications.

Setting Up Official Position Titles

Access the Official Position Titles page (Set Up HRMS, Product Related, Organizational Development, Official Position Titles, Official Position Titles).

Official Position Titles page

If you are adding a new position title code you must first select an occupational series and enter an official position title code. After you access this page enter an official positional title and description.

Official Position Title and **Description**	Enter a title and description of the position. If you leave these fields blank and later select a job code on the Job Information page, these fields will display the title and description associated with that job code.
	You can override the default value. This information appears on the incumbent's Employment record. As such, this information should be updated to refect that the position title, short title,and long description are always overwritten with the Job Code's values when changing a position's job code.

Setting Up Official Position Titles(USF)

Access the Official Position Titles page for USF (Organizational Development, Position Management, Define Position Data USF, Official Position Titles USF, Official Position Titles USF).

Follow the same instructions for non-USF position titles above.

Creating Positions

To create positions, use the Position Data (POSITION_DATA) component.

This section discusses how to:

• Enter information about a position.

• Enter position-specific information.

• Review budget and incumbent information.

Pages Used to Create Positions

Page Name	Definition Name	Navigation	Usage
Position Data - Description	POSITION_DATA1	• Set Up HRMS, Product Related, Organizational Development, Position Data, Description • Organizational Development, Position Management, Maintain Positions/Budgets, Add/Update Position Info, Description • Organizational Development, Succession Planning, Define Key Positions, Key Positions, Description • Organizational Development, Succession Planning, USF, Identify Key Positions, Description	Enter a description of the position.
Position Data - Specific Information	POSITION_DATA5	• Set Up HRMS, Product Related, Organizational Development, Position Data, Specific Information • Organizational Development, Position Management, Maintain Positions/Budgets, Add/Update Position Info, Specific Information • Organizational Development, Succession Planning, Define Key Positions, Key Positions, Specific Information • Organizational Development, Succession Planning USF, Identify Key Positions, Specific Information	Enter information that is specific to the position you're creating, such as the work phone number and the mail drop ID.

Page Name	Definition Name	Navigation	Usage
Position Data - Budget and Incumbents	POSITION_DATA6	• Set Up HRMS, Product Related, Organizational Development, Position Data, Budget and Incumbents • Organizational Development, Position Management, Maintain Positions/Budgets, Add/Update Position Info, Budget and Incumbents • Organizational Development, Succession Planning, Define Key Positions, Key Positions, Budget and Incumbents • Organizational Development, Succession Planning USF, Identify Key Positions, Budget and Incumbents	Review the position's current budget and incumbents.
Position Data - Detailed Position Description	POSN_DESCR_SEC	• Click the Detailed Position Description link on the Position Data - Description page. • Click the Detailed Position Description link on the Add/Update Position Info - Description page. • Click the Detailed Position Description link on the Key Positions - Description page. • Click the Detailed Position Description link on the Identify Key Positions - Description page.	View the detailed position description for this position.

Entering Information About a Position

Access the Position Data - Description page (Set Up HRMS, Product Related, Organizational Development, Position Data, Description).

Position Data - Description page (1 of 2)

Position Data - Description page (2 of 2)

Position Information

Position Number	The unique number assigned to the position. You can specify the position number when creating a new position or you can enable the system to assign the next number for you (when you save) by accepting the default value *00000000* in the Add a New Value page.
	To avoid maintaining two different sets of position numbers, PeopleSoft recommends that you either always assign numbers manually or always enable the system to do it; do not do both.
Initialize	**Note.** This button appears only if you're adding a new position.
	Click to copy all or many of the characteristics of a similar existing position. When you click this button, a dialog box prompts you for the position number of the position that you want to copy. Click OK to populate the Position Data component with the position information of the position that you selected. You can override any information that doesn't apply to the new position.
	If you are not aware of any similar positions that you could use to populate the remaining fields, just populate the fields individually.
Reason	Select a reason for the change or creation of the position from the list of available options.
Position Status	Indicate when the position is *Approved, Frozen,* or *Proposed.*
Status Date	Indicate the date for the position status.

Key Position	Select if this is a key position.

Job Information

Business Unit	Enter the business unit for the position.
Job Code	Select the job code that is associated with this position. The job title associated with this jobcode is defaulted into the (position) title field when a jobcode is selected.
Reg/Temp (regular or temporary)	The system enters a default value of *Regular* for a new position. If the position is temporary, select *Temporary* from the available options.
	Note. (USF) Federal users: If the position is *Temporary,* enter a date in the Not To Exceed Date field on the Federal Data Position Job Information page.
Full/Part Time(full-time or part-time)	The system enters a default value of *Full-Time* for a new position. If the position is part-time, select *Part-Time* from the available options.
Regular Shift	If your organization assigns shifts to positions, select a regular shift code.
Union Code	Enter the union code for the position.
Title	This field displays a title for the selected position. This field is defaulted from the title associated with the jobcode. The user can override this defaulting by typing in a new title.
	Note. If you have Update Incumbents selected on the Specific Information page, modifications to the position title will be reflected on each incumbents job data as a change in the employee's job title. This job title can be seen on the Job Information page of the Job Data component.
Short Title	Enter a short title of the position. When you select a job code on the Job Information page, this field displays the short title associated with that job code. You can override the default value.
Detailed Position Description	Click to access the Detailed Position Description page and enter a detailed position description, if required, for this position.

Work Location

Reg Region (regulatory region)	Enter a regulatory region for the position.
Department	Select the department that this position is associated with from the list of available options.

Company	When you select a department this field displays the associated company and is unavailable for entry. If the department that you select has no associated company, select one from the list of available options.
Location	Select the location that this position is associated with from the list of available options.
Reports To	To establish reporting relationships, select the position number that this position reports to from the list of available options.

If this is the top position record, enter the position's number here. For example, in the CEO's position record, enter the CEO's position number in this field. |
Dot-Line	If there is a dotted line reporting relationship to another position, select that position number from the list of available options.
Supervisor Lvl (supervisor level)	Select the supervisor level, if applicable, associated with the position from the list of available options.
Security Clearance	Select a value for a type of security clearance that can be held by a person.

Salary Plan Information

Salary Admin Plan (salary administration plan)	Select the salary plan associated with the position from the list of available options. The value that you select appears on the Job Data component when you assign a new employee to a position.
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.
Standard Hours	Enter the standard hours worked in the associated Work Period for this position. For example, if the Work Period is *Weekly,* the Standard Hours might be 40.00.
Work Period	Select the work period associated with this position. The work period is the smallest unit of time that employers use to communicate working hours to their employees.

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

(USA) United States

FLSA Status (Fair Labor Standards Act status)	Determine the appropriate coverage under the Fair Labor Standards Act, and select either *Administrative, Executive, Management, No FLSA Required, Nonexempt, Outside Salesperson*or *Professional.*

(DEU) Germany

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

(AUS) Australia

Package Template ID	Select a salary package template ID.
Package Rule ID	Select a salary package rule ID.

Entering Position-Specific Information

Access the Position Data - Specific Information page (Set Up HRMS, Product Related, Organizational Development, Position Data, Specific Information).

Position Data - Specific Information page

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

Update Incumbents	Select to have the system automatically update incumbent job data on the Job Data component. This option isn't applicable until you have assigned an employee to the position.
	The default is deselected. If deselected, or off, then the Include Salary Plan/Grade check box will be unavailable. If the employee record is using Position Data and the Update Incumbents check box is selected, then you can also check Include Salary Plan/Grade, which makes the Salary Plan, Grade, and Step fields controlled by the position and cannot be modified in Job Data.
	Note. (USF) Federal users don't currently use this field.
Include Salary Plan/Grade	Select to include the salary plan and grade in the incumbents update. When you select the Include Salary Plan/Grade check box, then salary plan and grade are included in the incumbent update. When you deselect Include Salary Plan/Grade, then the salary plan and grade are not included in the incumbent update.
	Note. If the position data military Rank field is populated, then the Include Salary Plan/Grade field is unavailable for data entry.
Budgeted Position	This check box is selected by default. If this position's status is proposed or frozen, deselect this check box. Otherwise, leave it selected for reporting purposes, so that the system knows that this is an approved position.
Confidential Position	Select if this position is confidential.
Job Sharing Permitted	Select if job sharing is permitted for this position. If job sharing is permitted, indicate the position's maximum head count (the maximum number of people who can share the position) in the Max Head Count field.
Available for Telework	Select if this position allows workers to work remotely.

(E&G) Education and Government

Position Pool ID	If appropriate, select a position pool ID from the list of available options. This code maps to the position pool with which this position should be budgeted in Commitment Accounting.
	Position pools enable you to group related positions together for budgeting purposes. For instance, you could group all positions related to your PeopleSoft HCM implementation project in a single position pool and then assign a budget to that pool.
Pre-Encumbrance Indicator	Indicate if you want the position to encumber immediately. Values include: *Immediate, None* or *Requistn* (requisition).

Calc Group (Flex Service) (calculation group [flexible service])	If you are using Track Flexible Service, select a calculation group for this position.
Encumber Salary Option	If you encumber salaries using Manage Commitment Accounting, select an encumber salary option. The system uses the option that you select here to determine salary when it encumbers the salaries of vacant positions.
Academic Rank	If this is a faculty position, select an academic rank.
Classified Indicator	Associate the position with an FTE (Classification (full time equivalents classification) that you established on the Department Budget FTE page.

When you hire a worker into a position in the Workforce Administration menu, the system displays the FTE data tied to the position in the Job Data pages for the worker. |
| **FTE**(full time equivalents) | Enter the FTE value for this position to be used for defining an FTE budget in Manage Commitment Accounting. |
| **Adds to FTE Actual Count** | Select to include this position when processing FTE edits for budgeting purposes. Don't select this check box if you don't want to include this position when processing FTE edits. |

See Also

Reviewing Budget and Incumbent Information

Access the Position Data - Budget and Incumbents page (Set Up HRMS, Product Related, Organizational Development, Position Data, Budget and Incumbents).

Position Data - Budget and Incumbents page

Current Budget	The Current Budget group box displays the position's Head Count, Current Budgeted FTE,and Amount.
Current Incumbents	After you assign an employee to the position, this group box displays the Core incumbent's EmplID (employee ID), Empl Rcd Nbr (employee record number), Name. and a Job Data link.
	Select the Job Data link to access the Job Data component, EmplID is populated automatically. The system transfers you back to the Position Data component when you complete your review or after you have made changes.

(USF) Running Reports on Position Data and Related Tables

This section discusses how to generate reports of the position data and other setup tables you have defined. These reports are for U.S. Federal Government installations.

Pages Used to Run the Reports

Page Name	Definition Name	Navigation	Usage
Occupational Series USF - Run Control	PRCSRUNCNTL	Organizational Development, Position Management, Position Reports, Occupational Series USF, Run Control	Occupation Series report (FGOCC800) provides details of the Occupational Series table.

Page Name	Definition Name	Navigation	Usage
Position Title Table USF - Run Control	PRCSRUNCNTL	Organizational Development, Position Management, Position Reports, Position Title Table USF, Run Control	Run the Position Title Table report (FGPER815) to list the Position Title Table records. (Crystal)
Job Code USF - Run Control	PRCSRUNCNTL	Organizational Development, Position Management, Position Reports, Job Code USF, Run Control	Run the Job Code USF (FGPER823) to print a list of all job codes and the date on which they become effective. (Crystal)
OF8 Report USF	RUNCTL_FGOF8	Organizational Development, Position Management, Position Reports, OF8 Report USF, OF8 Report USF	Run the optional (USF) OF8 report (FG0F8) which provides a standardized mechanism to identify position information such as title, occupational series, grade, organizational structure, certification blocks, and other position related information.
Vacant Position USF	RUNCTL_FGHR010	Organizational Development, Position Management, Position Reports, Vacant Position USF, Vacant Position USF	Run the optional (USF) Vacant Position report (FGHR010) which lists all currently vacant, budgeted positions in your organization.

Assigning Employees to Positions

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

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Chapter 4

Managing Position Data

This chapter discusses how to:

- Maintain position data.

- Update position data.

- Update incumbent job data.

- Verify position data.

Maintaining Position Data

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

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

This section discusses how to:

- Determine where to update data.

- (USF) Update the data.

- Distinguish incumbent and position data.

Determining Where To Update Data

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

- For incumbent data, go to Workforce Administration, Job Information, Job Data to make your changes.

- For position-related data, make your changes in the Position Data pages.

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

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

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

Use the Transfer Action in the Workforce Administration 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. Department/Location changes in Position Data has some behavioral impacts on the Establishment ID value on Job Data:

If a Department change does not change the Location:

*   The system does not clear the Establishment ID on the Job Data page:

    *   If the Location has only one valid Establishment ID.

    *   If the Location has more than one valid Establishment ID and the current Establishment ID is valid for the Location.

*   The system clears the Establishment ID on the Job Data page, if the Location has more than one valid Establishment ID and the current Establishment ID is not valid for the Location.

If a Department change does change the Location:

*   The system populates the Establishment ID on Job Data, if the location has only one valid Establishment ID.

*   The system does not clear the Establishment ID on Job Data if the location has more than one valid Establishment ID and it is valid for the new location.

*   The system clears the Establishment ID on Job Data if the location has more than one valid Establishment ID and it is not valid for the new location.

(USF) Updating the Data

Once you've determined the type of change that you want to make, go to the following pages:

*   For employee data, go to the Workforce Administration, Job Information components to make your changes.

*   For position-related data, make your changes in the Position Data component.

*   If your changes affect both position and incumbent data, use the Position Data component and then update the employee-level information in the components in the Workforce Administration menu.

Use the Transfer Action in the Job Information pages to move an employee from one position to another. This type of transfer implies that the employee is being promoted or demoted and will get a pay change.

Distinguishing Incumbent and Position Data

This section discusses:

- Considerations.

- Position data changes.

- Incumbent data changes.

- Position and incumbent data changes.

Considerations

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

Position Data Changes

If you are making changes to the position, such as changing the position's DeptID, Salary Plan, or Title, make these changes in the Position Data pages. These changes are applied to the position and the incumbent.

Changes to some fields in the Position Data component update the incumbent's job record. In the Updating Position Changes to the Job Data Component section of Setting Up Positions, there is a table of fields that are common to the Position Data component and the incumbent's job record. The table indicates which of those fields are updated in the job record when changed in the Position Data component.

Incumbent Data Changes

If you want to make a change that affects only the employee and not the position, make the changes on the incumbent's job record. Note that these are changes that aren't going to be associated with the position and applied to future incumbents, or they are changes independent of the position. This includes changes in the incumbent's 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 change the work phone on a position and Update Incumbents is switched on (select the Update Incumbents check box in Position Data - Specific Information page), the Position Phone is automatically updated on the Job Data - Employment page for the employees.

If you are making a change to a Position Data field that doesn't update the incumbent's job record, make your change in both the Position Data pages and the incumbent's Job Data record. For instance, if you change a position's Work Phone, the system does not update the incumbent's job record with the new value if you have deselected the Update Incumbents check box. In this case you need to update the job record manually.

See Also

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.

This section discusses:

•   Making changes to position data.

•   Understanding effective dates and updating position data.

Making Changes to Position Data

To make changes to position data, follow these steps:

1.   Open Position Data - Description.

2.   Insert a new data row.

     The system enters the system date, which is usually the current date, as the effective date. Change this unless the current date is the first day that the change takes effect.

     Note. The Update Incumbent function will only run if you are entering a current or future dated row.

3.   Enter a reason for the new row.

4.   Make your changes to the appropriate pages.

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

Understanding Effective Dates and Updating Position Data

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

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

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

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

This also means the system cross-updates *current* and *future* 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 Workforce Administration pages and the Position Data pages because the effective dates and sequence of data rows greatly affect how the system updates and maintains matching incumbent and position data. So that they can update data in both places, the user must have security access to both the position and the person.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Administering HCM Security"

Updating Incumbent Job Data

This section discusses how to:

* Follow guidelines.

* Update job data.

* Insert new rows.

* Delete rows.

* Make corrections.

* When you don't want to update job data.

Following Guidelines

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

* When you make insertions, deletions, or corrections to job data that affect the current incumbent payroll, the system, where needed, marks payline records for recalculation. When payroll is recalculated, the payroll system uses the new information.

- When you make insertions, deletions, or corrections to the current incumbent job data or employment data that affect benefits, the system sets the flags controlling event maintenance to indicate that a change has occurred. During the next event maintenance process, the system processes the event.

- When a position changes from full- to part-time, the system automatically sets the flag for COBRA activity in benefits.

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

Updating Job Data

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

Note. When saving data in the Position Data component, and the number of incumbents for the position exceeds the limit identified in the Online Update Incumbent Limit field on the Installation - HRMS Options page, the system displays a message that the update of incumbent data will be done through a batch process. The process is scheduled and another message with the process instance number of the job displays. The application engine program calls the Position Data CI so that the UpdateIncumbents function is invoked to perform the incumbent updates.

If the number of incumbents for the position does not exceed the limit identified on the HRMS Options page, the incumbent data is updated online.

Inserting New Rows

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

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

To ensure that the system updates incumbent job data when you insert new rows, make sure that:

- The position row that you insert is current or future effective-dated.

- The current incumbent Job Data - Work Location page uses the position data in the current job data row. (If the position data is used, the system automatically populates the position related fields and makes them unavailable for entry. The Override Position Data button is now visible.)

- The Update Incumbents check box on the Position Data - Specific Information page is selected.

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

Deleting Rows

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

To maintain 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.

Use the Correction action for current rows and the Update/Display action for future effective-dated rows.

To delete a row:

1. Access the Position Data - Description page.

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

   Remember that if any job data rows exist that have an effective date *after* the row that you're deleting, you must update them manually.

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

4. You can now make changes to the correct position.

Making Corrections

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

The system cross-updates data when you're making corrections, provided that:

• You're correcting a current or future effective-dated position row.

   Note. 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.

• Position data has not been overridden on the Job Data - Work Location page for related incumbents.

When You Don't Want to Update Job Data

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

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

• Click Override Position Data on the incumbent Job Data - Work Location page.

• deselect the Update Incumbents check box on the Position Data - Specific Information page.

You can use these options whenever you need to. Furthermore, whenever you set them to the settings for cross-updating to take place, the system begins updating the records automatically again. This is particularly useful if you entered some exceptions for a short period of time, but they no longer apply.

Whenever you select the check box so that maintaining job data won't occur, check and update the affected data rows manually.

When you save position data, the system will issue messages to inform you that:

• The position is inactive and therefore no incumbent updates will be made.

• Incumbent data will not be updated unless the Update Incumbents check box is selected.

• No changes will be made for the incumbent because position data has been overridden.

• No changes will be made for an incumbent because the position changes predate the current Job record.

• The position record is not current and therefore no incumbent action will be taken.

• The position record is in the future and therefore no employment updates will be made.

Selecting the Override Position Data Button in Incumbent Job Data, Work Location

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

If you override the defaults for position-related data, you must maintain the employee data manually. The system doesn't update the position data on the Job Data pages with data from the Position Data pages until you click the Use Position Data button on the Job Data - Work Location page.

Deselecting the Update Incumbents Check Box in Position Data, Specific Information

This check box is selected by default for every new data row that you enter. You won't deselect the check box very often because when you want to make sure the system doesn't overwrite exceptions to position data, you usually click Override Position Data.

However, if you forget, for example, to click Override Position Data, or you're making corrections to historical data and need to update data manually in both the Position Data and Job Data pages, you deselect the Update Incumbents check box. The Update Incumbents check box is located on the Position Data - Specific Information page.

Verifying Position Data

As you update data in fields that match in the Position Data and incumbent Job Data pages, periodically you should check the data to ensure the system contains the right information in both places. You can run an SQR audit, the Exception/Override report, to determine if any data that doesn't match in the two components.

You can choose between:

• The Override report that prints incumbent job data where you have prevented automatic cross updating from occurring.

• The Exception report that prints only exceptions where the incumbent job and position data is out of sync for other reasons.

Pages Used to Verify Position Data

Page Name	Definition Name	Navigation	Usage
Exception/Override USF	RUNCTL_FGHR028	Organizational Development, Position Management, Position Reports, Exception/Override USF, Exception/Override USF	Run the (USF) Exception/Override report (FGHR028) to audit the data in fields that match in the Position Data component and the current incumbent Job Data component. (SQR)
Exception/Override	RUNCTL_POS008	Organizational Development, Position Management, Position Reports, Exception/Override, Exception/Override	Run the Exception/Override report (POS008) to audit the data in fields that match in the Position Data component and the current incumbent Job Data component. (SQR)

Chapter 5

Maximizing Position Data

This chapter provides an overview of maximizing your position data, lists common elements, and discusses how to:

- Create departmental budgets.

- View budget summary information.

- View and report on vacant budgeted position information.

- Review position summary information.

- Maintain your organizational structure.

- Run the organizational structure reports.

- Use manage positions nVision reports.

Understanding How to Maximize Position Data

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

Common Elements

Actual Head Count	Displays the actual number of employees assigned to this position.
Job Code	Displays the job code associated with the position and a short description of the job code.
Location	Displays the location this position is associated with as of the effective date.
Max Head Count(maximum head count)	Displays the maximum head count defined for this position.

Position	Displays the position number and title of the position.
Rate Code Group	Displays a rate code group for this rate code.
Reports To	Displays the number and title of the position this position reports to as of that effective date.
Default Without Override	Indicates that the system directly set the compensation rate on the rate code.
Calculated By	Indicates whether the compensation rate for this rate code is directly set on the rate code or is system-generated using a rate matrix. A value of *None* indicates the rate is directly set on the rate code. A value of *Rate Matrix* indicates that the compensation rate is system-generated by a matrix.
	The Matrix Definition page, located on the Setup HRMS, Common Definitions, Configurable Matrices, Define Matrices component, displays the name of the matrix, if applicable.

Creating Departmental Budgets

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

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

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

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

This section discusses how to:

• Establish department, job code, or position budgets.

• View details about the budget of a department.

Pages Used to Create Departmental Budgets

Page Name	Definition Name	Navigation	Usage
Update Dept Budget Data	POSN_BUDGET_DATA	Organizational Development, Position Management, Maintain Positions/Budgets, Update Dept Budget Data, Update Dept Budget Data	Establish department, job code, or position budgets.
Position Budget Detail	POSN_BUD_DATA_DTL	Click the Department Position Details link on the Update Dept Budget Data page.	View details about the department.

Establishing Department, Job Code, or Position Budgets

Access the Update Dept Budget Data page (Organizational Development, Position Management, Maintain Positions/Budgets, Update Dept Budget Data, Update Dept Budget Data).

Update Dept Budget Data page

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

Budget Periods

Budget End Date	Enter the date the budget ends.
Budget Level	Displays the budget level that you specified on the Department Table.
Total Budget FTE(total budget of full time equivalents)	Displays the total number of FTE budgeted for all positions in this department.
Budget Salaries	Displays the total budget salaries for all positions in this department.
🔳	Click to calculate and display budget figures in alternate currencies.

Budget Data

Budget Status	Select the budget status.
	Values include:
	Approved: The system copies the Requested figures to the Approved field and this becomes available for data entry so that you can enter the actual amounts, if different.
	Frozen: Only the Requested field remains available for you to enter data.
	Proposed: This is the default value. Selecting this causes the Approved and YTD Adjustments fields to be unavailable for entry.
Date Last Change	Every time you modify information in this page, the system updates this field with the system date.
Requested	Enter the requested Head Count, FTE, Amount, Currency code, and Date for the budget. If you select *Approved* in the Budget Status field, these fields are unavailable for entry.
	Note. Select a currency code if you're using a currency for this departmental budget that's different from the base currency specified in the Installation Table.
Approved	Enter the approved Head Count, FTE, Amount, Currency code, and approval Date, if different from the values that appear by default from the Requested line.
YTD Adjustments(year-to-date adjustments)	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 Head Count, FTE, and Amount totals using the values in the Approved field, plus or minus the adjustments entered in the YTD Adjustments.

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

Viewing Details About a Budget of a Department

Access the Position Budget Detail page (click the Department Position Details link on the Update Dept Budget Data page).

Position Budget Detail 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 Actual FTE	Displays the FTE total of this department.
Total Annual Salaries	Displays the sum of all annualized salaries in this department converted to the user's preferred currency as defined on the Primary Permission List Preferences page.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Installing PeopleSoft HCM"

PeopleSoft HR 9.1 PeopleBook: Manage Commitment Accounting, "Defining Fiscal Year Budgets"

Viewing Budget Summary Information

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

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

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

This section discusses how to:

*   View a summary of budgeted and actual figures for departments.

*   Review detailed salary information.

*   Display comp rate code information.

Pages Used to View Budget Summary Information

Page Name	*Definition Name*	*Navigation*	*Usage*
Budget Status	POSN_BUDGET_STATUS	Organizational Development, Position Management, Review Position/Budget Info, Budget Status, Budget Status	View a summary of budgeted and actual figures for departments.
Salary Components	COMP_POSN_BUDG_SEC	Click the Components link on the Budget Status page.	Review detailed salary information about the position incumbents at the position entry date and the position end dates.
Rate Code	WCS_RTCD_DETAILS	Click the Details link on the Controls tab of the Salary Components page.	Display component rate code information.

Viewing Summary of Budgeted and Actual Figures for Departments

Access the Budget Status page (Organizational Development, Position Management, Review Position/Budget Info, Budget Status, Budget Status).

Budget Status page

Current Budget

Total Budget FTE	Displays the total budgeted FTE for this position. This information is specified on the Position Data - Specific Data page.
Total Budget Amount	Displays the total salary amount for the incumbents assigned to this position.
Current Budget Head Count	Displays the current budgeted head count for this position. Head count budgets are defined on the Update Dept Budget Data page.
Current Budget FTE	Displays the current budgeted FTEs for this position. FTE budgets are defined on the Update Dept Budget Data page.
Current Budget Amount	Displays the current budgeted salary amount for incumbents assigned to this position.
Head Count Variance	Displays the difference between the Actual Head Count and the Current Budget Head Count values.

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

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

Current Incumbents

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

Components	Click to view the Salary Components page.

Reviewing Detailed Salary Information

Access the Salary Components page (click the Components link on the Budget Status page).

Salary Components page: Amounts tab

Note. Select the tabs to view additional information.

Common Page Information

Compensation Rate	Displays the position incumbent's compensation rate.
Compensation Frequency	Displays the position incumbent's compensation frequency.

Amounts Tab

Select the Amounts tab.

Rate Code	Displays a rate code. Rate codes are IDs for pay components. The system displays any compensation information associated with this rate code in the compensation grid.
Seq (sequence)	Displays a number indicating multiple use of the same rate code if it is used more than once.
Comp Rate (compensation rate) and **Currency**	Displays the position incumbent's annual compensation rate and type of currency.
Frequency	Displays the frequency over which the payee is paid the compensation rate.
Points	Displays the salary points associated with this rate code, if any.
Percent	If the rate type for this rate code is Percent, the system displays the percent to be applied to the job compensation rate or to a rate code group if you're using rate code groups.

Controls Tab

Select the Controls tab.

Salary Components page: Controls tab

Manually Updated	Indicates that the rate for this rate code was manually updated on the Job compensation record.
Details	This link shows the rate code definition.

Changes Tab

Select the Changes tab.

Salary Components page: Changes tab

Change Amount	Displays the overall change amount in this pay component rate.
Change Points	Displays the overall change amount (in points) for this pay component. This field is visible only if Salary Points is selected on the Installation Table page.
Change Percent	Displays the overall change amount for this pay component. This field isn't applicable to rate codes that have a rate code type of Percent or Points.

Conversion Tab

Select the Conversion tab.

Salary Components page: Conversion tab

Converted Comp Rate
(converted compensation rate)

Displays the converted compensation rate for this pay component. The system converts all base pay components to the currency and compensation frequency that you specify.

Apply FTE (apply full time equivalents)

The value associated with the rate code is 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.

Displaying Comp Rate Code Information

Access the Rate Code page (click the Details link on the Controls tab of the Salary Components page).

Rate Code page

Base Pay

Indicates if this compensation 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 compensation rate code.

Rate Code Type

Displays one of the following compensation rate types:

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

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

Hourly Rate: Identifies an hourly rate of pay.

Percent: Identifies a percentage assignment for this rate code.

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

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

Viewing and Reporting on Vacant Budgeted Position Information

This information about vacant budgeted positions can help you plan recruitment activities and costs. This section discusses how to view department vacant position information.

Pages Used to Run Reports on Vacant Budgeted Positions

Page Name	Definition Name	Navigation	Usage
Vacant Budgeted Positions	POSN_BUDGET_VACANT	Organizational Development, Position Management, Review Position/Budget Info, Vacant Budgeted Positions	View position information about the positions currently vacant in a department and the attendant position information.
Vacant Position - Run Control	PRCSRUNCNTL	Organizational Development, Position Management, Position Reports, Vacant Position, Run Control	Run the Vacant Position report (POS007) that lists all currently vacant, budgeted positions in your organization. (Crystal)

Viewing Department Vacant Position Information

Access the Vacant Budgeted Positions page (Organizational Development, Position Management, Review Position/Budget Info, Vacant Budgeted Positions).

Vacant Budgeted Positions page

Note. Select the tabs to view additional information.

Common Page Information

Total Vacant Positions   Displays the total number of vacancies in the department.

Position Information Tab

Position Status(position status) Displays the status (for example *Approved* or *Frozen*) of any vacant,
                                      budgeted position.

Full/Part Time(full-time or   Displays if the vacant position is *Full-Time* or *Part-Time.*
part-time)

Regular/Temporary(regular or   Displays if the vacant position is *Regular* or *Temporary.*
temporary)

Job Information Tab

This tab displays job code, position, job function, salary administration plan, and salary grade.

Work Location Tab

This tab displays the position code as well as descriptions of work locations.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "PeopleSoft Application Fundamentals for
HCM Reports," Manage Positions Reports

Reviewing Position Summary Information

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

 Human Resources provides some quick ways to review this data. Manage Positions provides display-only
pages and reports of current and historical position data.

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

This section lists common elements and discusses how to:

• View general current and historical information about a position.

• View position history.

• View current position information.

- View salary components information.

Common Element Used in This Section

Show Components   Select to have the report display compensation component information for each incumbent.

Pages Used to View and Run Reports of Position Summary Information

Page Name	Definition Name	Navigation	Usage
Position Summary	POSITION_SUMMARY	Organizational Development, Position Management, Review Position/Budget Info, Position Summary, Position Summary	View general current and historical information about a position.
Position History	POSITION_HISTORY	Organizational Development, Position Management, Review Position/Budget Info, Position History, Position History	View information on incumbents currently and previously assigned to a position.
Position History - Current Position Data	CURRENT_POSN_DATA	Click the Current Position Data link on the Position History page.	View current position details.
Position History - Salary Components	COMP_POSN_HIST_SEC	Click the Components link on the Position History page.	View detailed salary information about the position incumbents at the position entry date or the position end dates.

Page Name	Definition Name	Navigation	Usage
Position Status or Active Position History	RUNCTL_ASOFDATE	Organizational Development, Position Management, Position Reports, Position Status, Position Status Organizational Development, Position Management, Position Reports, Active Position History, Active Position History	Use this page to run these reports: • Position Status report (POS001). This report inventories the types of positions in your organization, and lists all filled and vacant positions. • Active Position History report (POS004). This report lists all current and historical data related to a position, for all active positions in the organization.
Active/Inactive Positions	RUNCTL_POS002	Organizational Development, Position Management, Position Reports, Active/Inactive Positions, Active/Inactive Positions	Run the Active/Inactive Positions report (POS002). This report lists the current position-related data for active positions, inactive positions, or both, depending on which report you select to run. (Crystal)
Active/Inactive Positions USF	RUNCTL_FGHR025	Organizational Development, Position Management, Position Reports, Active/Inactive Positions USF, Active/Inactive Positions USF	Run the Active/Inactive Positions USF report (FGHR025). This report lists the current position-related data for active positions, inactive positions, or both, depending on which report you select to run. (Crystal)
Incumbent History	RUNCTL_ASOFDT_COMP	Organizational Development, Position Management, Position Reports, Incumbent History, Incumbent History	Run the Incumbent History report (POS003). This report lists, by position, all current and former incumbents in the organization, beginning with the current incumbent for each position and going back in time. Prints entry and exit dates for each incumbent, and starting and ending salaries. (SQR)

Page Name	Definition Name	Navigation	Usage
Incumbent History USF or Active Position History USF	RUNCTL_FGASOFDT	Organizational Development, Position Management, Position Reports, Incumbent History USF, Incumbent History USF Organizational Development, Position Management, Position Reports, Active Position History USF, Active Position History USF	Use this page to run these reports: • Incumbent History USF report (FGHR026). This report lists, by position, all current and former incumbents in the organization, beginning with the current incumbent for each position and going back in time. Prints entry and exit dates for each incumbent, and starting and ending salaries. • Active Position History USF report (FGHR027). This report lists all current and historical data related to a position, for all active positions in the organization.

Viewing General Current and Historical Information About a Position

Access the Position Summary page (Organizational Development, Position Management, Review Position/Budget Info, Position Summary, Position Summary).

Position Summary

Position Number: 19000003 Manager-Compensation/Benefits

Position Data   Customize | Find | | First 1-2 of 2 Last

General | Work Location | Payroll Information

Effective Date	Action Reason	Status	Status Date	Max Head Count	Budgeted
01/01/1996		Approved	01/01/1980	3	Y
01/01/1980	New Posn	Approved	01/01/1980	1	Y

Position Summary page: General tab

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

General Tab

Action Reason	Displays the action and reason for changes to the position as of that effective date.
Status Date	Displays the date the position first had that status. For example, if a position has a status of *Active* at its most recent position change, effective 01/04/1998 and the position's status was last changed to *Active* 01/01/2005, the status date for the position change effective 01/04/1998 is 01/01/2005.
Budgeted	Indicates if the position is budgeted *(Y)* fpr Yes or *(N* for No).

Work Location Tab

Reports To	Displays the number and title of the position this position reports to as of that effective date.
Job Code	Displays the job code this position is assigned to as of that effective date.

Payroll Information Tab

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

Viewing Position History

Access the Position History page (Organizational Development, Position Management, Review Position/Budget Info, Position History, Position History).

Position History page

Displays incumbent salary information, which you can use for budgeting and to anticipate the approximate salary a new incumbent will receive. By examining the exit reasons, you can find ways to reduce incumbent turnover in a position.

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

Viewing Current Position Information

Access the Position History - Current Position Data page (click the Current Position Data link on the Position History page).

Current Position Data

Position Number:	19000003	Manager-Compensation/Benefits
Company:	GBI	Global Business Institute 9999
Business Unit:	GBIBU	Global Business Institute BU
Department:	10000	Human Resources
Job Code:	600035	Manager-Compensation/Benefits
Salary Plan:		
Max Head Count:	3	
Current Head Count:	2	
Headcount Status:	Partially Filled	

Position History - Current Position Data page

Salary Plan   Displays the position's salary plan.

Current Head Count   Displays the current headcount assigned to this position.

Headcount Status   Displays the headcount status for this position.

Viewing Salary Components Information

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

See Also

Maintaining Your Organizational Structure

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

Human Resources provides two ways to view positions in hierarchical form:

*   By entering supervisory position numbers in the Reports To Posn (position) field in the Position Data - Description page, you can generate reports that show position hierarchies.

- If you want to see part of your organization chart online, use PeopleSoft Tree Manager to create a position tree, which illustrates position hierarchies.

This section discusses how to:

- Establish position hierarchies in Position Data.

- Maintain position hierarchies in PeopleSoft Tree Manager.

Establishing Position Hierarchies

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

Here's how to set up position hierarchies:

1. Open the Position Data - Description page (Organizational Development, Position Management, Maintain Positions/Budgets, Add/Update Position Info).

2. Establish direct and or indirect (dotted-line) reporting relationships.

   a. To establish direct reporting relationships, enter the supervisor's position number in the Reports To field on the Position Data, Description page for each position that you create.

   b. To establish indirect reporting relationships, select a position number in the Dot-Line field on the Position Data - Description page.

3. Save your changes.

Once you enter all the reporting relationships among positions, run the Build Position Structure SQR (POS006A), which links the positions in the system and creates an organizational hierarchy.

Establishing Direct Reporting Relationships

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

Note. When Position Management is set to *Partial* in the Installation Table and the Reports to Position and the Supervisor ID fields contain values in Position Data, both fields appear in Job Data until you enter a value in one or the other.

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

Establishing Indirect Reporting Relationships

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

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

Establishing Reporting Hierarchies by Creating a Top Position

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

To establish a top position:

1. Add the top position.

2. Save the top position.

3. Reopen the top position and enter the top position number in the Reports To field on the Position Data - Description page.

4. Save the top position again.

Maintaining Position Hierarchies in PeopleSoft Tree Manager

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

Note. Review the PeopleSoft Tree Manager documentation for a full, detailed discussion about PeopleSoft Tree Manager before you attempt to modify or create Position Trees.

This section discusses using PeopleSoft Tree Manager to define and maintain Position Trees in Human Resources but is *not* an exhaustive discussion about the use of PeopleSoft Tree Manager.

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

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

Building Position Trees

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

Field	*Value*
Tree Name	Enter a name to help you identify this tree.

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

Inserting Nodes

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

See Also

PeopleTools 8.52: Tree Manager PeopleBook

Running the Organizational Structure Reports

Once you enter all the reporting relationships among positions, run the Build Position Structure SQR to link the positions in the system and create an organizational hierarchy. Run this utility at the following times:

- When you first enter the reporting relationships.

- Any time that you add new positions.

- When you change reporting relationships among existing positions.

You can generate a report listing the relationships in an indented organizational chart format, the Indented Position report.

This section discusses how to run the Organizational Structure Report.

Pages Used to Run the Organizational Structure Reports

Page Name	Definition Name	Navigation	Usage
Build Position Structure	RUNCTL_ASOFDATE	Organizational Development, Position Management, Create Organization Structure, Build Position Structure, Build Position Structure	Run the Build Position Structure SQR (POS006A). This SQR links the positions in the system and creates the reporting hierarchy represented in the Indented Position Report.
Create Organizational Report	RUNCTL_POS006	Organizational Development, Position Management, Create Organization Structure, Create Organizational Report, Create Organizational Report	Run the Organizational report (POS006) which provides a visual representation of reporting relationships among positions by level, if any, in the organization. (SQR) Always run this after running Build Position Structure.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "PeopleSoft Application Fundamentals for HCM Reports," PeopleSoft HCM Reports: Selected Reports

Running the Organizational Report

Access the Create Organizational Report page (Organizational Development, Position Management, Create Organization Structure, Create Organizational Report, Parameters).

Create Organizational Report page

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.

Using Manage Positions nVision Reports

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

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

Viewing Status Information for Approved Head Count in a Department

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

Viewing Status Information for Actual Headcount in a Department

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

See Also

PeopleTools 8.52: PS/nVision PeopleBook

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