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PeopleSoft

PeopleSoft HCM 9.2: Human Resources Manage Positions

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PeopleSoft HCM 9.2: Human Resources Manage Positions
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Contents

Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

PeopleSoft Hosted Online Help

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Online Help website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted online help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Online Help website is available in English only.

Note: Only the most current release of hosted online help is updated regularly. After a new release is posted, previous releases remain available but are no longer updated.

Locally Installed Help

If you are setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the Hosted Online Help website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Elasticsearch for full-text searching. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Elasticsearch, see the documentation for your chosen search engine.

Note: See Oracle Support Document 2205540.2 (PeopleTools Elasticsearch Home Page) for more information on using Elasticsearch with PeopleSoft.

Note: Before users can access the search engine on a locally installed help website, you must enable the Search field. For instructions, go to your locally installed PeopleSoft Online Help site and select About This Help >Managing Locally Installed PeopleSoft Online Help >Enabling the Search Button and Field in the Contents sidebar.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has

a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft Applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	*Description*
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (	).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.

Typographical Convention	Description
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

• Asia Pacific

• Europe

• Latin America

• North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)

- E&G (Education and Government)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.

- PeopleSoft Online Help accessibility.

- Accessing, navigating, and searching the PeopleSoft Online Help.

- Managing a locally installed PeopleSoft Online Help website.

PeopleSoft Application Fundamentals

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

Related Links for PeopleSoft HCM

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

Contact Us

Send your suggestions to PSOFT-INFODEV_US@ORACLE.COM. Please include release numbers for the PeopleTools and applications that you are using.

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Chapter 1

Getting Started with Manage Positions

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.

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 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 Creating Positions.

Refer to the *PeopleSoft HCM 9.2 - Reorganization of Component Interface Permissions* (Doc ID 2342162.1) MOS posting for a list of system-delivered CIs and their usage, the mapping of CIs and associated permission lists, and the mapping of CI permission lists and user roles.

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 the product documentation for *PeopleTools: Component Interfaces* and *PeopleTools: Setup Manager*.

Related Links
PeopleSoft Global Payroll

Chapter 2

Understanding Position Management

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

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.

These topics discuss 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 these topics, 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.

Related Links
"Setting Up Implementation Defaults" (PeopleSoft HCM 9.2: Application Fundamentals)
"Entering Company Information" (PeopleSoft HCM 9.2: Application Fundamentals)
"Maintaining Departments" (PeopleSoft HCM 9.2: Application Fundamentals)
"Classifying Jobs" (PeopleSoft HCM 9.2: Application Fundamentals)
"Setting Up Federal HCM Control Tables" (PeopleSoft HCM 9.2: Application Fundamentals)

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
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

Updated Field	Defaulted Fields	Source Table
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 Set ID Location Set ID Salary Set ID Jobcode Set ID
Classified Indicator	Classified Indicator (E&G only)
Company	Company
Department	Department ID Department Entry Date
FLSA Status	FLSA Status
FTE	FTE (E&G only)
Full or Part Time	Full or Part Time
Grade	Grade
Jobcode	Jobcode Job Entry Dt
Location	Location
Reg/Temp	Reg/Temp
Regulatory Region	Regulatory Region Labor Agreement Set ID
Reports to	Reports to
Salary Admin Plan	Salary Admin Plan
Standard Hours	Standard Hours
Shift	Shift

Updated Field In Position Data Component	*Updated Field In Incumbent's Job Record*
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.

Related Links

Creating Positions

"Updating Job Data" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

"Setting Up Implementation Defaults" (PeopleSoft HCM 9.2: Application Fundamentals)

"Understanding Job Data" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

"Understanding the Process of Updating Person and Job Information" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

"Understanding PARs" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

"Understanding the Administering PAR System" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

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 the product documentation for *PeopleTools: Application Designer Developer's Guide*

(USF) Setting Up Occupation Series Classifications, Standards, and Cyber Security Specialities

To set up occupational series classifications, standards, and cyber security specialities, use the Occupational Series USF (GVT_OCCUPATION), Classification Standards USF (GVT_CLASS_STD_TBL), and the Cyber Security Specialty USF (GVT_CYBERSEC_CODE) components.

These topics discuss how to set up federal occupation series classifications and standards.

Pages Used to Set Up Occupation Series Classifications, Standards, and Cyber Security Specialities

Page Name	Definition Name	Usage
Occupation Series USF Page	GVT_OCCUPATION	Define the occupation series classifications.
Classification Standard Table Page	GVT_CLASS_STD_TBL	Create classification standards by establishing a description and level for each type of classification.
Classification Factor Table Page	GVT_CLASS_FCTR_TBL	Designate Classification Standards' classification factors.
Classification Level Table Page	GVT_CLASS_LVL_TBL	Associate classification factor levels and points with classification factors.
Grade Conversion Table Page	GVT_CLASS_GRD_CNV	Enter a grade and point range for each grade.
Specialty Area/Work Role Page	GVT_CYB_SPCLTY_CD	Define work role.
Cyber Security Specialty USF Page	GVT_CYBERSEC_CODE	Define cyber security specialty codes.

Occupation Series USF Page

Use the Occupation Series USF page (GVT_OCCUPATION) to define the occupation series classifications.

Navigation

Image: Occupation Series USF page

This example illustrates the fields and controls on the Occupation Series USF page. You can find definitions for the fields and controls later on this 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.

Classification Standard Table Page

Use the Classification Standard Table page (GVT_CLASS_STD_TBL) to create classification standards by establishing a description and level for each type of classification.

Navigation

Image: Classification Standard Table page

This example illustrates the fields and controls on the Classification Standard Table page. You can find definitions for the fields and controls later on this page.
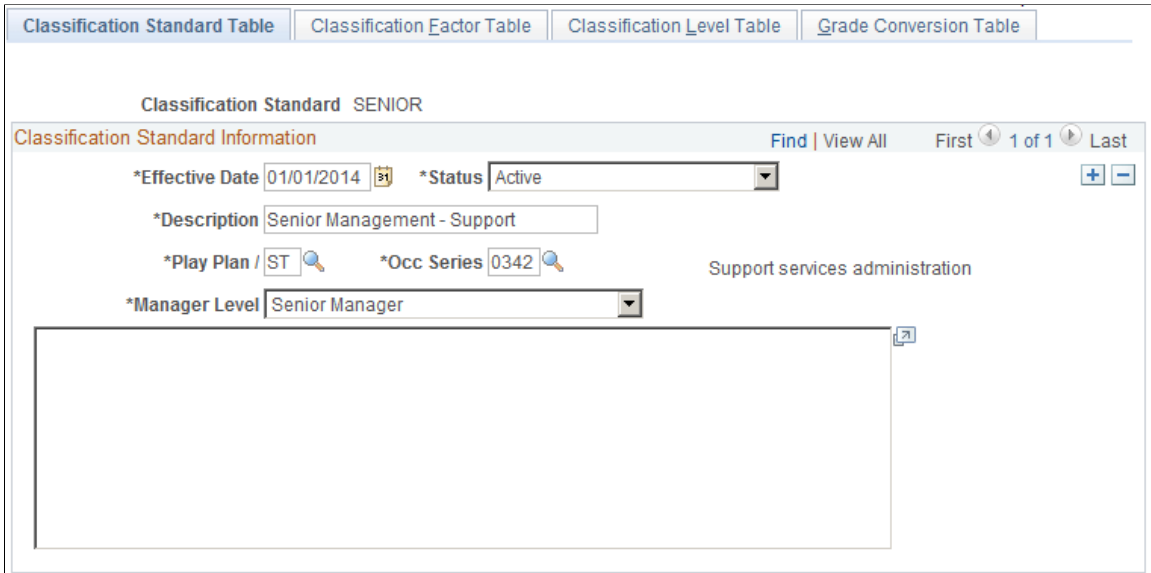
| **Pay Plan / , Occ Series** (occupation series) | Select the occupation series to associate with the classification standard from the list of available options. The system displays the associated pay plan. Occupation series are maintained on the Occupation Series USF page. |
| **Manager Level** | Select the manager level to associate with the classification standard from the list of available options. |

Classification Factor Table Page

Use the Classification Factor Table page (GVT_CLASS_FCTR_TBL) to designate Classification Standards' classification factors.

Navigation

- Set Up HCM > Product Related > Organizational Development > Classification Standards USF > Classification Factor Table

- Organizational Development > Position Management > Define Position Data USF > Classification Standards USF > Classification Factor Table

Image: Classification Factor Table page

This example illustrates the fields and controls on the Classification Factor Table page. You can find definitions for the fields and controls later on this 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.

Classification Level Table Page

Use the Classification Level Table page (GVT_CLASS_LVL_TBL) to associate classification factor levels and points with classification factors.

Navigation

- Set Up HCM > Product Related > Organizational Development > Classification Standards USF > Classification Level Table

- Organizational Development > Position Management > Define Position Data USF > Classification Standards USF > Classification Level Table

Image: Classification Level Table page

This example illustrates the fields and controls on the Classification Level Table page. You can find definitions for the fields and controls later on this page.
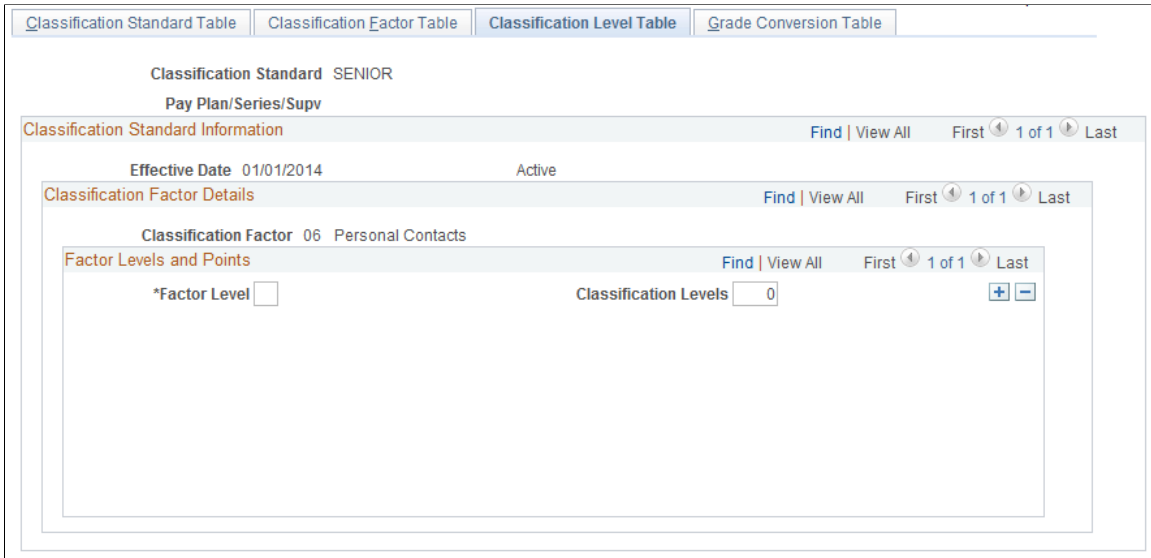
Factor Level	For each classification factor that you specify, enter the applicable factor levels that are relevant to a specific occupation or category of work. Assign multiple factor levels to a classification factor by inserting more rows.
Classification Levels	Assign the point values for each factor level.

Grade Conversion Table Page

Use the Grade Conversion Table page (GVT_CLASS_GRD_CNV) to enter a grade and point range for each grade.

Navigation

- Set Up HCM > Product Related > Organizational Development > Classification Standards USF > Grade Conversion Table

- Organizational Development > Position Management > Define Position Data USF > Classification Standards USF > Grade Conversion Table

Image: Grade Conversion Table page

This example illustrates the fields and controls on the Grade Conversion Table page. You can find definitions for the fields and controls later on this page.
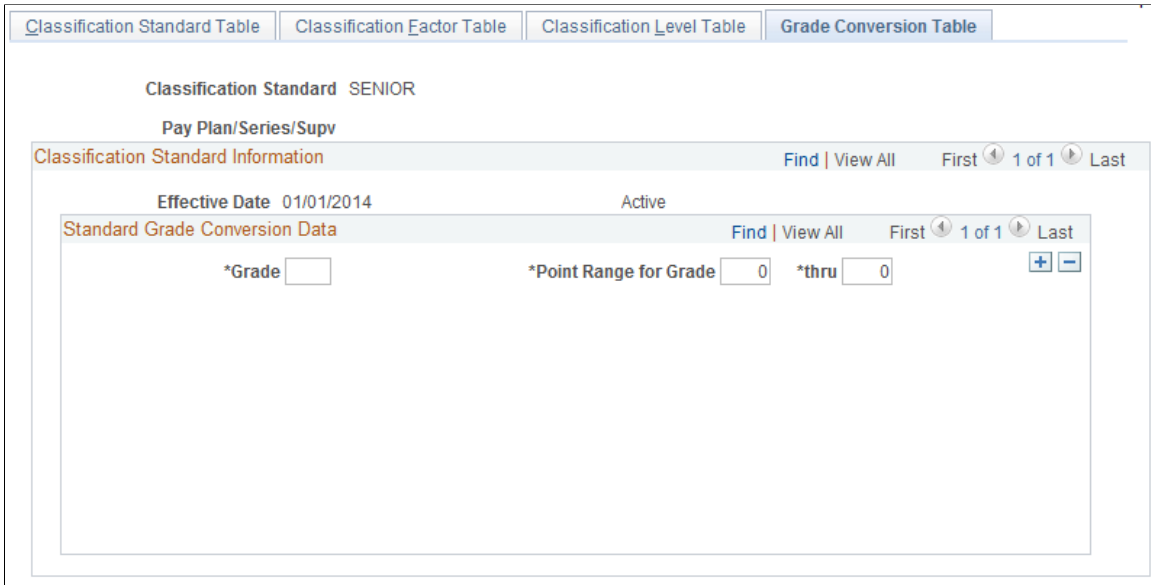
| Grade | Enter the grade to associate with this classification standard. Associate multiple grades with this classification standard by inserting more rows. |

Specialty Area/Work Role Page

Use the Specialty Area/Work Role page (GVT_CYB_SPCLTY_CD) to define cyber security specialty area and work role.

Navigation

Setup HCM >Product Related >Workforce Administration >Workforce Data USF >Specialty Area/Work Role

Image: Specialty Area/Work Role page

This example illustrates fields and controls in the Specialty Area/Work Role page.
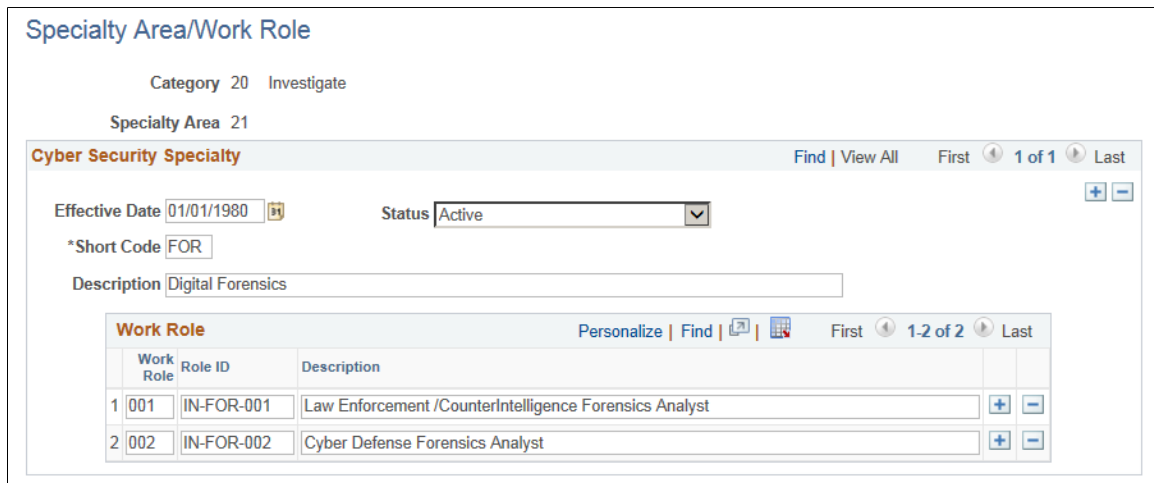
Cyber Security Specialty

Effective Date	The date from which the specialty area/work role is applicable.
Status	Select the status as Active or Inactive.
Short Code	The alphabetic code for specialty area.
Description	Enter specialty area description.
Work Role	
Work Role	The three digit numeric work role code starting with 00.
Description	Enter the name of the work role.

Cyber Security Specialty USF Page

Use the Cyber Security Specialty USF page (GVT_CYBERSEC_CODE) to define cyber security specialty codes.

Navigation

Image: Cyber Security Specialty USF page

This example illustrates the fields and controls on the Cyber Security Specialty USF page.

The cyber security specialty code is used to identify incumbents or positions for which the primary function is cyber security. It is a three digit code where:

- Category: First Digit

- Specialty Area: First and Second Digits (together)

- Work Role: Third Digit

Positions may be classified in an occupational series based on the nature of the work in the US Federal section on the Position Data - Description Page. This code will enable OPM and Federal agencies to identify the cyber security workforce, determine baseline capabilities, examine hiring trends, identify skill gaps, and more effectively recruit, hire, train, develop and retain an effective cyber security workforce.

The codes and definitions are defined by the National Cyber Security Workforce Framework.

Note: Three cyber security codes can be added to a Position (Position Data under US Federal section) if rows are added for effective date higher than December 1st 2016. The priority should be assigned based on the criticality of work role. The most critical work role should select be set as 1 and next critical as 2 .Priority field is used to link three cyber security code to report 9 character code to OPM.

(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.

These topics discuss how to set up position titles.

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	Usage
Official Position Titles Page Official Position Titles USF Page	GVT_PSN_TTL_TBL	Set up official position titles that will later be associated with positions. Before using the page, set up Occupation Series classifications.
Organizational Posn Titles USF Page	GVT_ORG_PSN_TTL	Set up organization position titles that will later be associated with positions. Before using the page, set up Occupation Series classifications.

Official Position Titles Page

Use the Official Position Titles page (GVT_PSN_TTL_TBL) to set up official position titles that will later be associated with positions.

Before using the page, set up Occupation Series classifications.

Navigation

- Set Up HCM > 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

Image: Official Position Titles page

This example illustrates the fields and controls on the Official Position Titles page. You can find definitions for the fields and controls later on this page.

Official Position Titles

Occupational Series 0560   Budget analysis
Official Position Title Code 01

Official Position Title   Find | View All   First ◀ 1 of 1 ▶ Last

*Effective Date 01/01/1980   *Status Active   + -

*Official Position Title Budget Analyst

*Description Budget Analyst

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 reflect 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.

Organizational Posn Titles USF Page

Use the Organizational Posn Titles USF page (GVT_ORG_PSN_TTL) to set up organization position titles that will later be associated with positions.

Before using the page, set up Occupation Series classifications.

Navigation

• Set Up HCM > 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

Follow the same instructions for non-USF position titles.

Creating Positions

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

Note: Guided self-service for managers includes the option to request a new position by cloning an existing one. Depending on your configuration, requests are submitted for approval processing before the new position is created. For more information about this additional method of creating new positions, see "Configuring Guided Self-Service Transactions for Manager Self-Service" (PeopleSoft HCM 9.2: eProfile Manager Desktop) and "Performing Guided Self-Service Transactions in Manager Self-Service" (PeopleSoft HCM 9.2: eProfile Manager Desktop).

These topics discuss how to create positions.

Pages Used to Create Positions

Page Name	*Definition Name*	*Usage*
Position Data - Description Page	POSITION_DATA1	Enter a description of the position.

Page Name	Definition Name	Usage
Position Data - Specific Information Page	POSITION_DATA5	Enter information that is specific to the position you're creating, such as the work phone number and the mail drop ID.
Position Data - Budget and Incumbents Page	POSITION_DATA6	Review the position's current budget and incumbents.
Position Data - Detailed Position Description Page	POSN_DESCR_SEC	View the detailed position description for this position.

Position Data - Description Page

Use the Position Data - Description page (POSITION_DATA1) to enter a description of the position.

Navigation

- Set Up HCM > 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

Image: Position Data - Description page (1 of 2)

This example illustrates the fields and controls on the Position Data - Description page (1 of 2). You can find definitions for the fields and controls later on this page.

Image: Position Data - Description page (2 of 2)

This example illustrates the fields and controls on the Position Data - Description page (2 of 2). You can find definitions for the fields and controls later on this page.

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 effective date and 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 job code is defaulted into the (position) title field when a job code is selected.
	In Education and Government systems, you can select only job codes where the Used by Position Management check box is selected on the "Evaluation Criteria Page" (PeopleSoft HCM 9.2: Application Fundamentals) in the Job Code Table component.
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.

(DEU) German Public Sector

Service Class Group — Enter a service class group. Valid values are:

- *1 – Without University Degree (Mit Hochschulabschluß)*

- *2 – With University Degree (Ohne Hochschulabschluß)*

- *ED – Simple Service (einfacher Dienst)*

- *GD Upper Service (gehobener Dienst)*

- *HD – Supreme Service (höherer Dienst)*

  MD – Midrange Service (Mittlerer Dienst)

Allowance — Indicate whether this position is eligible for additional allowance.

Note: For customers using Position Management, a change to the Service Class Group field or a change to the Allowance selection will not automatically be updated to Job. The Update Incumbent functionality only covers a few select fields.

(AUS) Australia

Package Template ID — Select a salary package template ID.

Package Rule ID — Select a salary package rule ID.

(CAN) Canada

Employment/Labour Std Status (employment and labour standards status) — Choose whether this position is *Exempt* or *Non-Exempt* according to the provincial Employment Standards Act or Labour Standards Act.

The default value is *Non-Exempt* until you select a job code, at which point the default value comes from the job code table.

The value that you select becomes the default value for the Employment/Labour Std Status field on worker job records that are associated with this position.

(USF) US Federal

These fields are available when you work in a federalized (U.S. Federal) database:

Image: Position Data - Description page, US Federal section

This example illustrates the fields and controls on the Position Data - Description page, US Federal section. You can find definitions for the fields and controls later on this page.

Occupational Series	Enter the occupational series that is associated with this position.
Parenthetical Title	Enter the parenthetical designation of the position. Select from *Data Transcribing*, *Office Automation*, *Stenography*, or *Typing*.
Organization Posn Title Code	Enter an official title for this position. These values are defined on the Official Position Titles Page.
Position Occupied	Identify the type of appointment which can occupy the position. Values are *Competitive*, *Excepted*, *SES (senior executive service) Career Reserved*, and *SES General*. This is a CPDF reported field.

Override NFC Indicator	Select this check box to override the value in the NFC Update Indicator field.
NFC Update Indicator	Displays the status of the transaction in relation to NFC, as maintained by the user or system. Options in this field include:

- *In Process* – This Jobcode has been run through the export program and will be sent to NFC.

- *Not Ready to Process* – User intends to exclude this position from export to NFC.

- *Other* – Status maintained by system user.

- *Ready To Process* – User intends to include this position in the next NFC export.

- *SINQ Error* – This position has not successfully passed NFC's PINE Edits and needs correction.

NFC Function Code	Identifies the task to be performed by NFC on a master record. Options in this field include *Add*, *Change*, *Delete/Restore*, *Inactivate*, and *Reactivate*.
Work Schedule	Select the work schedule for this position.
Fund Source	Select from *Appropriated Funds*, *External Funds*, *Non-Appropriated Funds*, or *Other Funds*.
Position Location	Indicate if this position is located at *Headquarters* or in the *Field*.
Personnel Office ID	Select the identification number for the personnel office of your agency.
Sub Agency	Select the sub-agency to which this position belongs.
Cyber Security Speciality	Enter a cyber security specialty code that should be associated with this position. Select the specialty area where the work of the position or incumbent is predominantly done. These codes are maintained on the <u>Cyber Security Specialty USF Page</u>.

> **Note:** Cyber Security Codes for Position is stored in a new child record POS_FED_CYB_CD. Data in POSITION_DATA. GVT _CYBER_SEC_CD is marked obsolete and should not be used. Add button and Priority fields are visible only for row with Effective Date on or after December 1st, 2016.

Position Data - Specific Information Page

Use the Position Data - Specific Information page (POSITION_DATA5) to enter information that is specific to the position you're creating, such as the work phone number and the mail drop ID.

Navigation

- Set Up HCM > 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

Image: Position Data - Specific Information page

This example illustrates the fields and controls on the Position Data - Specific Information page. You can find definitions for the fields and controls later on this 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, so the default setting for new positions is for this check box to be deselected. A warning appears if the check box is selected when you save a new position.

Note: If you use Guided Self-Service to update position data, be sure that the Update Incumbents check box is selected. This configuration is necessary so that the position data updates made through Guided Self-Service flow through to incumbent job records. It is safe to ignore the warning that appears if the Update Incumbents check box is selected when you save a new position. For more information, see "Understanding Updates to Position Data" (PeopleSoft HCM 9.2: eProfile Manager Desktop) in the Guided Self-Service documentation.

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.

If the Update Incumbents check box is not selected, then the Include Salary Plan/Grade check box is unavailable.

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.

Force Update for Title Change	Select to make position title changes trigger the update incumbent process. If this check box is selected when you create a new position data row with a reason of *TTL* (Title Change) and a change to the data in the Titlefield, then the system creates a corresponding row in the incumbents' Job Data records. The new job data row has the action code *Position Change* and the Action Reason *Title Change*.

Note that the job title is not actually stored on the job record. The job title that appears next to the Position Number field on the Work Location page is pulled from the position data record based on the effective date of the job data row. So if the Force Update for Title Change check box is not selected and no new job data row is created, the title shown on the job data row is

based on the previous effective date, which is why the old title continues to appear.

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: *Encumber Immediate, Encumber on Requisition,* or *No Encumbrance*.
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.

Important! The FTE fields are provided by default to the employee's Job record when Education and Government has been enabled in the system. Review the (E&G) Changing FTE Data documentation for considerations you should take when updating any fields that impact the FTE value of the position or a person's job.

Related Links
Maintaining Position Data

Position Data - Budget and Incumbents Page

Use the Position Data - Budget and Incumbents page (POSITION_DATA6) to review the position's current budget and incumbents.

Navigation

- Set Up HCM > 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

Image: Position Data - Budget and Incumbents page

This example illustrates the fields and controls on the Position Data - Budget and Incumbents page. You can find definitions for the fields and controls later on this 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 Empl ID (employee ID), Empl Record, 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 topic lists reports you run to view data you have defined on position data and other setup tables. These reports are for U.S. Federal Government installations.

Pages Used to Run the Reports

Page Name	*Definition Name*	*Usage*
Occupational Series USF - Run Control Page	PRCSRUNCNTL	Occupation Series report (FGOCC800) provides details of the Occupational Series table.
Position Title Table USF - Run Control Page	PRCSRUNCNTL	Run the Position Title Table report (FGPER815) to list the Position Title Table records.
Job Code USF - Run Control Page	PRCSRUNCNTL	Run the Job Code USF (FGPER823) to print a list of all job codes and the date on which they become effective.
OF8 Report USF Page	RUNCTL_FGOF8	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 Page	RUNCTL_FGHR010	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.

Chapter 4

Using the PeopleSoft Fluid User Interface to Manage Positions

Configuring Position Management for Fluid

To configure Position Management for fluid, use the Position Data Installation (INSTALLATION_POSN) component.

This topic discusses how to configure installation settings for Position Management for fluid.

Pages Used to Configure Position Management for Fluid

Page Name	Definition Name	Usage
Position Management Installation Page	INSTALLATION_POS	Define installation settings for Position Management for fluid.

Position Management Installation Page

Use the Position Management Installation page (INSTALLATION_POS) to define installation settings for Position Management for fluid.

Navigation

Set Up HCM >Install >Product Specific >Position Data Installation >Position Management Installation

Image: Position Management Installation Page

This example illustrates the fields and controls on the Position Management Installation page.
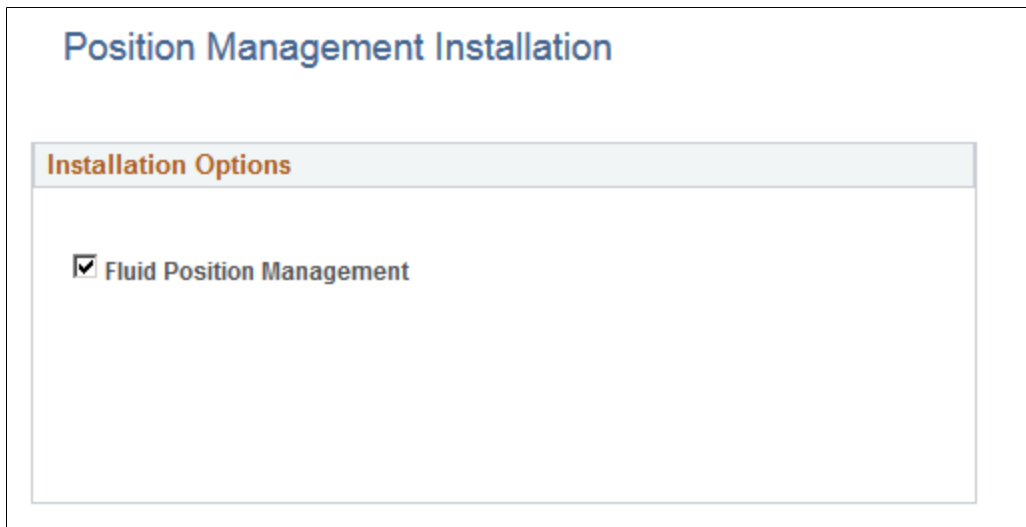
| Fluid Position Management | Select to enable the Manage Position pages to view, update, or create positions using fluid. If this option is deselected, when a user clicks the Manage Position Tile, the system will issue a warning to enable Fluid Position Management. |

Note: In order for users to access the Manage Position pages in fluid, you must also assign the *Manage Positions Fluid* (*HCCPHRFL3100*) permission list to the administrator role managing positions.

Related Links

Performing Position Management Tasks as an Administrator Using Fluid
Creating Positions Using Fluid

Performing Position Management Tasks as an Administrator Using Fluid

This topic discusses prerequisites to using fluid Position Management and lists the pages that administrators can access from a single location in the PeopleSoft Fluid User Interface to perform position management-related transactions.

For general information about fluid pages in PeopleSoft HCM, see "Understanding PeopleSoft Fluid User Interface Home Pages" (PeopleSoft HCM 9.2: Application Fundamentals).

The following video provides an overview of Fluid Position Management:

Image Highlights, PeopleSoft HCM Update Image 29: Fluid Position Management

Pages Used to Manage Positions as an Administrator Using Fluid

Page Name	Definition Name	Usage
Position Management Tile	HC_HR_POS_MANAGEMENT_FL (this is the cref for this tile)	Access the Position Management dashboard where you can set up or view summaries of Position Management data.
Position Management Dashboard	PT_LANDINGPAGE	Access Position Management-related tiles and pages.
Manage Position Tile	HC_HR_POSITION_DETAIL_FL (this is the cref for the tile)	Create and manage positions using the fluid pages.
Position Administration Tile	HC_POSITION_SUMMARY (this is the cref for the tile)	Access a nav collection of classic pages to view current and historical summary information..
Position Administration Nav Collection	POSITION_SUMMARY POSITION_HISTORY	Quickly access classic pages to view current and historical summary information, including incumbent history.

Prerequisites to Using Fluid Position Management

In order to access and use the fluid Position Management pages, the following steps must be performed first:

1. Assign the *Manage Positions Fluid* (*HCCPHRFL3100*) permission list to the administrator role managing positions. This permission list grants users access to these pages and objects via the PeopleSoft Fluid User Interface:

   • Manage Position

   • Position View Details

   • Related Information

   • The guided processes menu: Grouplets, My Preferences, and My Personalizations

2. Enable Fluid Position Management on the Position Management Installation Page.

3. To allow administrators the ability to delete position data rows through the fluid Position Data component, assign the *Position Delete Administrator* role to the user.

   Administrators delete positions using the Position Details Page

Synchronizing Position Management Data

PeopleSoft Position Management provides the Application Engine *POS_SYN_FLU* to synchronizes the data from your existing position management data to the new records using the effective sequence.

Note: To carry forward the customized data from your existing Position Management system, you need to add the custom fields and validations to the effective sequence component.

Position Management Tile

Use the Position Management tile to access the Position Management dashboard where you can set up or view summaries of Position Management data.

Navigation

The Position Management tile is delivered as part of the Workforce Administrator home page, but the location can change if you change the delivered home pages or if administrators personalize their home pages.

Image: Position Management Tile

This example illustrates the fields and controls on the Position Management tile.

Click the Position Management tile to access the Position Management Dashboard, where you can perform the task of creating, updating, or viewing summary information about positions.

Related Links
Understanding Positions

Position Management Dashboard

Use the Position Management dashboard (PT_LANDINGPAGE) to access Position Management-related tiles and pages.

Navigation

Click the Position Management Tile, which is delivered as part of the Workforce Administrator home page, but the location can change if you change the delivered home pages or if administrators personalize their home pages.

Image: Position Management Dashboard

This example illustrates the Position Management dashboard.

This Position Management dashboard enables administrators to access frequently-used Position Management components from one location.

The dashboard lists the components collected under these tiles:

Tile Name	Usage
Manage Position Tile	Create and manage positions using the fluid pages.
Position Administration Tile	View current and historical summary information, including incumbent history using the following classic pages: • Position Summary Page • Position History Page

Related Links

Creating Positions Using Fluid

Reviewing Position Summary Information

Position Administration Tile

Use the Position Administration tile to access a nav collection of classic page to view current and historical summary information.

Navigation

Image: Position Administration Tile

This example illustrates the Position Administration tile.

Click the Position Administration tile to access the Position Administration Nav Collection, where you can access the classic pages to view historical position and incumbent data.

Related Links

Reviewing Position Summary Information

Position Administration Nav Collection

Use the Position Administration nav collection pages to quickly access classic pages to view current and historical summary information, including incumbent history.

Navigation

Image: Position Administration Nav Collection

This example illustrates the Position Administration nav collection.
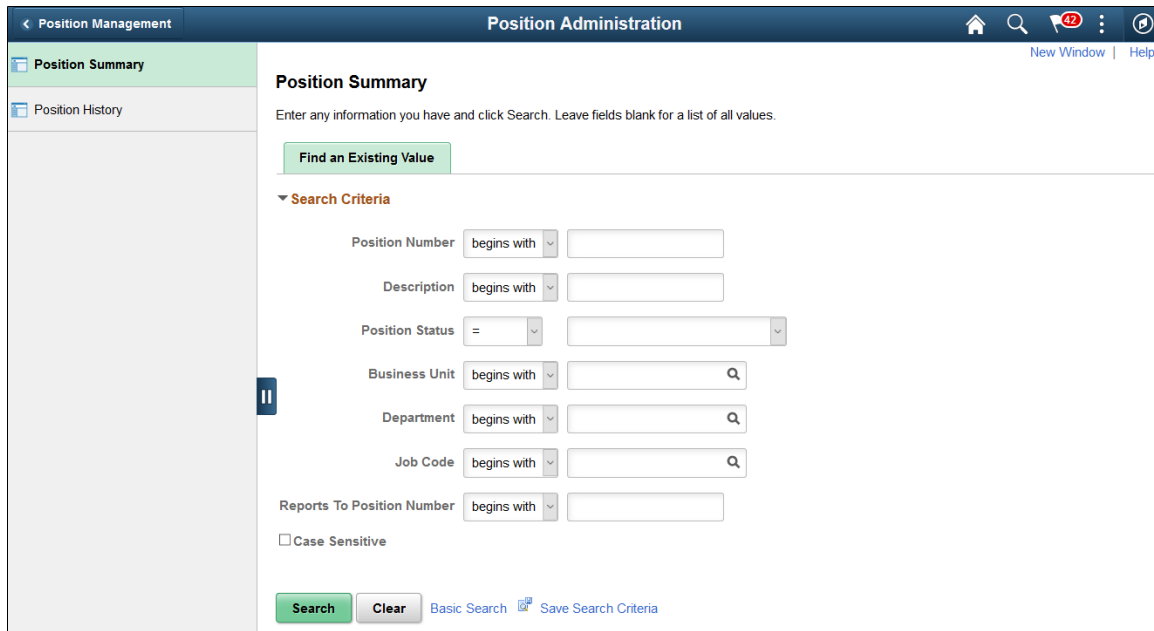
You can access the following classic pages from this nav collection:

Page Name	Usage
Position Summary Page	View general current and historical information about a position.
Position History Page	View information on incumbents currently and previously assigned to a position.

Related Links

Reviewing Position Summary Information

Creating Positions Using Fluid

To create positions, use the Manage Position (POSITION_DATA_FL) component in fluid.

This topic gives an overview of the Manage Position pages in fluid and lists the pages that administrators can access from a single location in the PeopleSoft Fluid User Interface to perform Position Management-related transactions.

For general information about fluid pages in PeopleSoft HCM, see "Understanding PeopleSoft Fluid User Interface Home Pages" (PeopleSoft HCM 9.2: Application Fundamentals).

The following video provides an overview of Fluid Position Management:

> ▶ [Image Highlights, PeopleSoft HCM Update Image 29: Fluid Position Management](#)

Pages Used to Create Positions Using Fluid

Page Name	Definition Name	Usage
Manage Position Tile	HC_HR_POSITION_DETAIL_FL (this is the cref for the tile)	Create and manage positions using the fluid pages.
Manage/Create Position (Search) Page	HC_HR_POSITION_DETAIL_FL	Search for a position by position number, description, or status. You can also create a position. View a chart of the position search results by business unit.
Position Details Page	POSITION_DETAIL_FL	Add, clone, view, edit, or delete an effective dated row for a position.
Clone Page	POSITION_CLONE_SBF	Clone a position.
Request Details Page	POSITION_ADD_SCF	Enter the effective date and reason for a new effective dated row.
The Activity Guide Composer Framework for the Manage/Create Position Component (common elements on pages used to create or manage positions using fluid)	N/A	In fluid Position Management, the application appears within the context of a PeopleTools Activity Guide. The activity guide shows a list of position data pages in the left panel and the page that corresponds to the current selected page step in the right panel. The activity guide also provides navigation buttons in the page sub-banner for navigating through the page steps.
Manage/Create Position - Position Data Page	POSITION_DATA_1_FL	Enter a description and job details about the position.
Manage/Create Position - Additional Information Page	POSITION_DATA_5_FL	Enter Education and Government information that is specific to the position.
Manage/Create Position - Attachments Page	POSITION_ATTACH_FL	Add or view attachments for a position.
Manage/Create Position - Budget Incumbents Page	POSITION_DATA_6_FL	Review the position's current budget and incumbents.
Manage/Create Position - Review and Submit Page	POSITION_SUMM_FL	Review a summary of the changes to this position and submit your position data for approvals.
Position Confirmation Page	POS_SUB_CNF_FL	Confirm that your position updates have been submitted.

Page Name	Definition Name	Usage
View Position Page	POSITION_VIEW_FL	View a complete summary of the position details by effective date.

Manage Position Tile

Administrators use the Manage Position tile to create and manage positions using the fluid pages.

Navigation

From the "Workforce Administrator Home Page" (PeopleSoft HCM 9.2: Application Fundamentals) in fluid, click the Position Management Tile to access the Position Management Dashboard.

The Manage Position tile is delivers as part of the Position Management dashboard by default, but the location can change if you change the delivered home pages or if administrators personalize their home pages.

Image: Manage Position Tile

This example illustrates the Manage Position tile.

Click the Manage Position tile to access the Manage/Create Position fluid component and pages. The system will display the Manage/Create Position search page that enables you to add a new position, or you can use search criteria in the left collapsible panel to locate a specific existing position:

Important! You must complete the prerequisites task In order to access the fluid Manage Position pages. For more information on the required preliminary tasks, see Prerequisites to Using Fluid Position Management.

Manage/Create Position (Search) Page

Use the Manage/Create Position search page to search for a position by position number, description, or status. You can also create a position. View a chart of the position search results by business unit.

Navigation

From the Position Management Dashboard click the Manage Position Tile.

Image: Manage/Create Position Search Page

This example illustrates the fields and controls on the Manage/Create Position search page.

Left Search/Facet Panel

Use this section to enter criteria and narrow your search results.

New Search	This section appears by default when you first access the page.
	You can use the following search criteria in the left collapsible panel to locate a specific existing position:
	• Position Number
	• Description
	• Position Status
	• Reports to Position Number
	Enter the search criteria and click Search. To perform a partial word search, use the % wild card.
	After you enter the initial search criteria, the main panel will display the results, and the left panel will display addition facets that correspond to the positions listed in the search results. Select facets to further narrow your search.

| Facets | This section displays information based off of the search results. Select different facets to further filter your results. |

View Manage/Create Position Panel

Use this section to view information about the positions from your search results.

Chart toggle switch	The Chart toggle switch defaults to *No*. Swipe to *Yes* to have the Manage/Create Position search page display a chart of the search results by business unit.
(chart option types)	These chart option icons are available when the Chart toggle switch is set to *Yes*.
	Click to display data in the chart type represented by the icon type. Available chart types include vertical bar (default value), line, pie and horizontal bar.
(Add button)	Click this button to open the Create Position page to enter a position number and effective date for a new position.
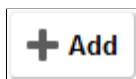
Search results appear in the main panel of the page. Select a row to access the Position Details Page and select a row to view, edit, delete, clone, or you can add a new effective dated row.

Position Details Page

Use the Position Details page (POSITION_DETAIL_FL) to add, clone, view, edit, or delete an effective dated row for a position.

Navigation

Select the Manage Position Tile, from the Manage/Create Position (Search) Page search results select a position.

Image: Position Details Page

This example illustrates the fields and controls on the Position Details page.

The position header (gray sub-banner) displays the unique number assigned to the position as well as the headcount status information. When you add or clone a 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.

Note: To avoid maintaining two different sets of position numbers, it is best practice to either always assign numbers manually or always enable the system to do it; do not do both.
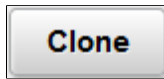
Clone Clone button	Click to clone the properties of this position. The system will open the <u>Clone Page</u> where you will enter a new position number and effective date.
➕ Insert Row button	Click this button to open the Request Details page and identify the effective date and reason for a new effective dated row. When you enter an effective date that is equal to the previous effective dated row, the system will increase the Effective Sequence field value by one.

The grid lists all the effective dated rows for this position. When there is more than one row for a date, the system uses the effective sequence to distinguish the rows.

Approval Chain	This link is available when you have approval workflow set up and the position has been sent for approval.
	Select this link to view the approval status and approver details of a proposed position.
✏️ Edit button	Click this button for an effective dated row to access the <u>Manage/Create Position - Position Data Page</u> and view or update this position.
🗑️ Delete button	Click to remove this effective dated row.
❯ View Detail button	Click the View Details button to access the <u>View Position Page</u> in a new browser window and view a summary of this position.

Clone Page

Use the Clone page (POSITION_CLONE_SBF) to clone a position.

Navigation

Click the Clone button from the <u>Position Details Page</u>.

Image: Clone Page

This example illustrates the fields and controls on the Clone page.

Position Number	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.
	Note: To avoid maintaining two different sets of position numbers, it is best practice to either always assign numbers manually or always enable the system to do it; do not do both.
Reason	For new positions, the field default value is NEW. .

Request Details Page

Use the Request Details page (POSITION_ADD_SCF) to enter the effective date and reason for a new effective dated row.

Navigation

Click the Insert Row (+) button from the Position Details Page.

Image: Request Details Page

This example illustrates the fields and controls on the Request Details page.

| Reason Code | Enter the reason for the change of the position. For new effective dated rows, you will select from the list of available options. |

The Activity Guide Composer Framework for the Manage/Create Position Component

In fluid, the Manage Position (or Create Position) component pages appear within the context of the Activity Guide Composer. The PeopleSoft HCM application delivers the *Manage Positions (POS_DAT)* template for this component.

The activity guide shows a list of position data pages (steps) in the left panel and the page that corresponds to the current selected page step in the right panel. The activity guide also provides navigation buttons in the page Hheader, or sub-banner (gray area), for navigating through the page steps.

To understand or set up templates using the Activity Guide Composer, see the "Understanding the Activity Guide Composer" (PeopleSoft HCM 9.2: Application Fundamentals) documentation.

Image: Page Layout for the Manage/Create Position Pages

This example illustrates the layout for the Manage Position (and Create Position) pages.

Note: Throughout this topic, the page illustrations show sections of the position management process without the context of the left panel activity guide step list. Even though the framework is not illustrated, remember that all steps appear within that framework.

Page Banner

The top of PeopleSoft pages is called the page banner.

- When updating or viewing an existing position, the banner will display the component title *Manage Position*.

- When creating a new position, the banner will display the component title *Create Position*.

Note: Although the component name differs, the pages, fields, and controls are the same throughout these components unless otherwise specified.

In PeopleSoft applications, the banner displays several standard icon buttons. These standard set of banner icon buttons include:

 Exit button

Click this button to exit the position and return to the search page without saving your data. The page will display a warning message confirming that you want to exit the page.

Position Header (Sub-Banner)

A gray area under the main page banner displays contextual information that is specific to the position, including the position number and headcount information.

 Previous button

Click this button to navigate to the previous page. Navigating to another page does not save your data.

The button is not visible on the first step in the request.

 Next button

Click this button to navigate to the next page. Navigating to another page does not save your data.

The Review and Submit page does not display the Next button. Instead it displays a Submit button.

 Submit button

This button appears on the Manage/Create Position - Review and Submit Page only.

Note: Your position data will not be saved to the system until you click the Submit button.

When approvals are required for updating or creating positions, the request will be sent to the approving managers, where they will use the Pending Approvals - Create Position Page or Pending Approvals - Manage Position Page to take action on a position request.

Left Panel Navigation

The page framework includes a left panel that lists the numbered page tabs in the position creation or maintenance process. Each step displays a status, which is either *Not Started* or *Visited*. Users can navigate to steps by clicking the page tab or using the navigation buttons in the banner,

Pages

The main panel displays the page for the current step in the transaction.

Note: For the discussion of the transaction page topics that follow, the page illustrations show the individual position management pages without the context of the activity guide step list, although the system will display the left panel step navigation.

<Title Text>   Displays a page title that includes the step name.

Supplementary Panel for the Manage Position Pages

If you use PeopleTools 8.57 or later, the position creation pages include a supplementary panel that provides access to related information and simplified analytics.

For more information about simplified analytics, see product documentation for *PeopleTools: Pivot Grid*, "Working with Simplified Analytics."

These videos demonstrate simplified analytics:

Simplified Analytics - Image Highlights

PeopleSoft Simplified Analytics

Navigation

Click the Supplementary Panel tab on any of the Manage Position pages.

Image: Supplementary Panel for the Manage Position Pages

This example illustrates the supplementary panel options for the Manage Position pages.
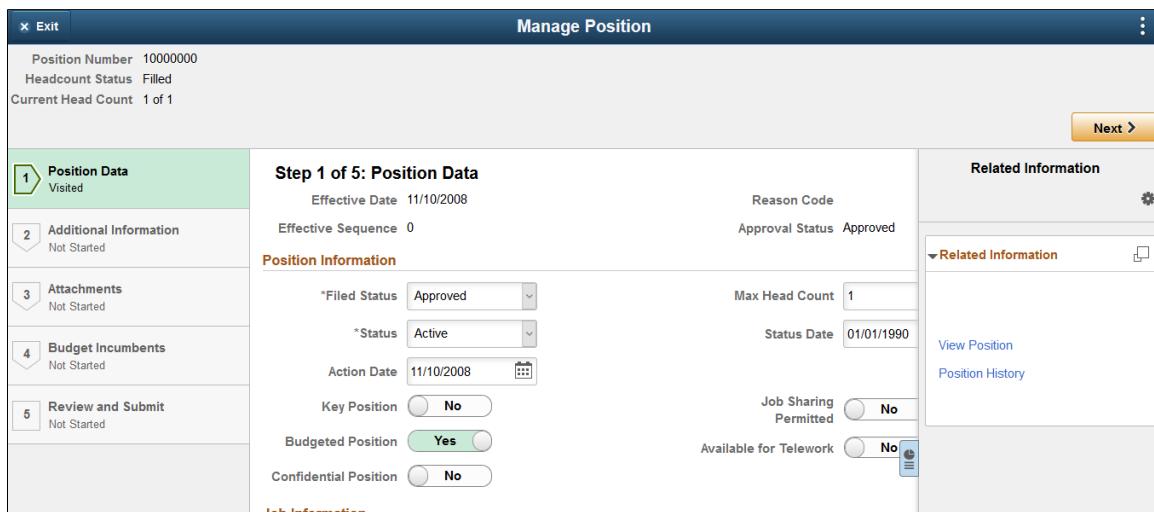
(Supplementary Panel tab)	Click this tab to open the Related Information panel and view related content.
[Personalize RC (Related Content) icon]	This icon appears at the top of the Related Information panel. Click to open the Personalize page. This page lists the available related content so you can choose whether the Related Information panel shows or hides each item.
(Display <Related Content Item> in Modal Window icon)	This icon appears at the top of each individual related content item in the Related Information panel. Click to expand the item to open a modal dialog with a larger interactive version of the content.
Related Information	For Manage Position, this supplementary pane includes the following links:

- View Position

  Click this link to open the View Position Page in a new browser window and view historical records about this position you are viewing or updating.

- Position History

  Click this link to open the Position History Page in a new browser window and view information on incumbents currently and previously assigned to this position.

For information on how to use the Related Information panel (also known as the Unified Related Content Analytics pane), see *PeopleTools: Pivot Grid*, "Working with Simplified Analytics," Accessing Simplified Analytics.

Related Links

"Understanding the Activity Guide Composer" (PeopleSoft HCM 9.2: Application Fundamentals)

Manage/Create Position - Position Data Page

Use the (Manage Position or Create Position) - Position Data page (POSITION_DATA_1_FL) to enter a description and job details about the position.

Navigation

To access the Manage or Create Position pages, start at the <u>Position Management Dashboard</u>, select the <u>Manage Position Tile</u>, then:

• Click the Add button from the Manage/Create Position search page.

• Enter search criteria on the Manage/Create Position search page and select a position. This will take you to the <u>Position Details Page</u> where you can:

   • Click the Clone button to enter the new position number and effective date.

   • Click the Insert Row (+) button to add a new effective dated row.

   • Click the Edit (pencil) button for a row to view and update existing information.

• After accessing the Manage Position component (by navigating as specified in either of the previous bullets), click the Previous button or select the Position Data tab from the left panel navigation steps.

Image: Position Data Page (1 of 3)

This example illustrates the fields and controls on the Position Data page (1 of 3).

Image: Position Data Page (2 of 3)

This example illustrates the fields and controls on the Position Data page (2 of 3).

Image: Position Data Page (3 of 3)

This example illustrates the fields and controls on the Position Data page (3 of 3).

Position Information

Filed Status	Indicate when the position is *Approved, Frozen,* or *Proposed.*
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.
Status Date	Indicate the date for the position status.
Key Position	Swipe this field to *Yes* if it is a key position. Key positions are used when creating succession plans for your organization. For more information on succession plans, see "Setting Up Succession Planning" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions).
Budgeted Position	This field is set to *Yes* by default. If this position's status is *Proposed* or *Frozen*, swipe this field to *No*. Otherwise, leave it set to *Yes* for reporting purposes, so that the system knows that this is an approved position.
Confidential Position	Swipe to *Yes* if this position is confidential.
Job Sharing Permitted	Swipe to *Yes* 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 near the top of this page.
Available for Telework	Swipe to *Yes* if this position allows workers to work remotely.

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 job code is defaulted into the (position) title field when a job code is selected. (E&G) In Education and Government systems, you can select only job codes where the Used by Position Management check box is selected on the "Evaluation Criteria Page" (PeopleSoft HCM 9.2: Application Fundamentals) in the Job Code Table component.
Regular/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 "Request Data - Data Control Page " (PeopleSoft HCM 9.2: Human Resources Administer Workforce) page.
Regular Shift	If your organization assign shifts to positions, select a regular shift code.
Title	This field displays a title for the selected position. This field is defaulted from the title associated with the job code. You can override this default value by typing in a new title.
	Note: If you have Update Incumbents selected on the Manage/Create Position - Budget Incumbents 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.
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.
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.
Union Code	Enter the union code for the position.
Description	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.
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. The position title will appear after the field. When a person is assigned to this reports to position, the page will also display the name of that person after the title.
	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.

Supervisor Lvl (supervisor level)	Select the supervisor level, if applicable, associated with the position 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.
Dot-Line (dotted-line)	If there is a dotted line reporting relationship to another position, select that position number 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.
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 *W (Weekly)* work period, enter the hours worked per day in the fields provided.
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.

Specific Information

Mail Drop ID and **Telephone**	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.

(USA) United States

FLSA Status (Fair Labor Standards Act status)	Determine the appropriate coverage under the Fair Labor Standards Act, and select either *Administrative, Computer Employee, Executive, Highly Compensated Employees, Management, No FLSA Required, Nonexempt, Nonexempt Alt Overtime, Outside Salesperson,* or *Professional.*
Bargaining Unit	Enter the bargaining unit associated with this position.

(DEU) Germany

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

(DEU) German Public Sector

Service Class Group	Enter a service class group. Valid values are:

- *1 – Without University Degree* (*Mit Hochschulabschluß*)

- *2 – With University Degree* (*Ohne Hochschulabschluß*)

- *ED – Simple Service* (*einfacher Dienst*)

- *GD Upper Service* (*gehobener Dienst*)

- *HD – Supreme Service* (*höherer Dienst*)

MD – Midrange Service (*Mittlerer Dienst*)

Allowance	Indicate whether this position is eligible for additional allowance.

Note: For customers using Position Management, a change to the Service Class Group field or a change to the Allowance selection will not automatically be updated to Job. The Update Incumbent functionality only covers a few select fields.

(AUS) Australia

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

(CAN) Canada

Employment/Labour Std Status (employment and labour standards status)	Choose whether this position is *Exempt* or *Non-Exempt* according to the provincial Employment Standards Act or Labour Standards Act.

The default value is *Non-Exempt* until you select a job code, at which point the default value comes from the job code table.

The value that you select becomes the default value for the Employment/Labour Std Status field on worker job records that are associated with this position.

(USF) US Federal

These fields are available when you work in a federalized (U.S. Federal) database:

Occupational Series	Enter the occupational series that is associated with this position.
Parenthetical Title	Enter the parenthetical designation of the position. Select from *Data Transcribing*, *Office Automation*, *Stenography*, or *Typing*.
Organization Posn Title Code	Enter an official title for this position. These values are defined on the <u>Official Position Titles Page</u>.
Position Occupied	Identify the type of appointment which can occupy the position. Values are *Competitive*, *Excepted*, *SES (senior executive service) Career Reserved*, and *SES General*. This is a CPDF reported field.
Override NFC Indicator	Select this check box to override the value in the NFC Update Indicator field.
NFC Update Indicator	Displays the status of the transaction in relation to NFC, as maintained by the user or system. Options in this field include:

- *In Process* – This Jobcode has been run through the export program and will be sent to NFC.

- *Not Ready to Process* – User intends to exclude this position from export to NFC.

- *Other* – Status maintained by system user.

- *Ready To Process* – User intends to include this position in the next NFC export.

- *SINQ Error* – This position has not successfully passed NFC's PINE Edits and needs correction.

NFC Function Code	Identifies the task to be performed by NFC on a master record. Options in this field include *Add*, *Change*, *Delete/Restore*, *Inactivate*, and *Reactivate*.
Work Schedule	Select the work schedule for this position.
Fund Source	Select from *Appropriated Funds*, *External Funds*, *Non-Appropriated Funds*, or *Other Funds*.

Position Location	Indicate if this position is located at *Headquarters* or in the *Field*.
Personnel Office ID	Select the identification number for the personnel office of your agency.
Sub Agency	Select the sub-agency to which this position belongs.
Cyber Security Speciality	Enter a cyber security specialty code that should be associated with this position. Select the specialty area where the work of the position or incumbent is predominantly done. These codes are maintained on the Cyber Security Specialty USF Page.

Note: Cyber Security Codes for Position is stored in a new child record POS_FED_CYB_CD. Data in POSITION_DATA. GVT_CYBER_SEC_CD is marked obsolete and should not be used. Add button and Priority fields are visible only for row with Effective Date on or after December 1st, 2016.

Manage/Create Position - Additional Information Page

Use the (Manage Position or Create Position) - Additional Information page (POSITION_DATA_5_FL) to enter Education and Government information that is specific to the position.

Navigation

To access the Manage Position pages start at the Position Management Dashboard, select the Manage Position Tile, then:

• Click the Add button from the Manage/Create Position search page.

• Enter search criteria on the Manage/Create Position search page and select a position. This will take you to the Position Details Page where you can:

  • Click the Clone button to enter the new position number and effective date.

  • Click the Insert Row (+) button to add a new effective dated row.

  • Click the Edit (pencil) button for a row to view and update existing information.

• After accessing the Manage Position component (by navigating as specified in either of the previous bullets), click the Previous or Next button or select the Additional Information tab from the left panel navigation steps.

Image: Additional Information Page

This example illustrates the fields and controls on the Additional Information page.

(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: *Encumber Immediately, Encumber on Requisition,* or *No Encumbrance*.
Encumber Salary Option	If you encumber salaries using Manage Commitment Accounting, select an encumber salary option. The system uses the option that you select here to determine salary when it encumbers the salaries of vacant positions.
Encumber Salary Amount	If you select *User Specified Amount* as the Encumber Salary Option, enter the salary amount to encumber.
Classified Indicator	Associate the position with an FTE (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	Swipe to *Yes* to include this position when processing FTE edits for budgeting purposes. Swipe to *No* if you don't want to include this position when processing FTE edits.

Important! The FTE fields are provided by default to the employee's Job record when Education and Government has been enabled in the system. Review the (E&G) Changing FTE Data documentation for considerations you should take when updating any fields that impact the FTE value of the position or a person's job.

Related Links

Maintaining Position Data

Manage/Create Position - Attachments Page

Use the (Manage Position or Create Position) - Attachments page (POSITION_ATTACH_FL) to add or view attachments for a position.

Navigation

To access the Manage Position pages start at the Position Management Dashboard, select the Manage Position Tile, then:

- Click the Add button from the Manage/Create Position search page.

- Enter search criteria on the Manage/Create Position search page and select a position. This will take you to the Position Details Page where you can:

    - Click the Clone button to enter the new position number and effective date.

    - Click the Insert Row (+) button to add a new effective dated row.

    - Click the Edit (pencil) button for a row to view and update existing information.

- After accessing the Manage Position component (by navigating as specified in either of the previous bullets), click the Previous or Next button or select the Attachments tab from the left panel navigation steps.

Image: Attachments Page

This example illustrates the fields and controls on the Attachments page.

Attachments

Use this section to manage attachments by uploading, deleting, or updating attachments using fluid. Attachments are not accessible from the classic pages. When a user submits position for approval, all attachments on this page will be sent with the request.

Add Attachment button	Click this button to access the File Attachment page and upload files.
Attachments and **Description**	Select the link to download and view the attachment. Enter a description, or the field will use the attachment file name as the description upon saving the page, which you can overwrite.
(Delete) button	Click this button to remove an attachment from this position.

Managers use fluid Approvals to view position requests using the Pending Approvals - Create Position Page or Pending Approvals - Manage Position Page.

The following video provides an overview and demonstration of the Fluid Attachment framework:

PeopleSoft Fluid HCM Attachments

Related Links

Using Fluid Approvals to Approve Position Data

Manage/Create Position - Budget Incumbents Page

Use the (Manage Position or Create Position) - Budget Incumbents page (POSITION_DATA_6_FL) to review the position's current budget and incumbents.

Navigation

To access the Manage Position pages start at the Position Management Dashboard, select the Manage Position Tile, then:

•   Click the Add button from the Manage/Create Position search page.

•   Enter search criteria on the Manage/Create Position search page and select a position. This will take you to the Position Details Page where you can:

    •   Click the Clone button to enter the new position number and effective date.

    •   Click the Insert Row (+) button to add a new effective dated row.

    •   Click the Edit (pencil) button for a row to view and update existing information.

•   After accessing the Manage Position component (by navigating as specified in either of the previous bullets), click the Previous or Next button or select the Budget Incumbents tab from the left panel navigation steps.

Image: Budget Incumbents Page

This example illustrates the fields and controls on the Budget Incumbents page.

Step 4 of 5: Budget Incumbents								
Effective Date 11/10/2008					Reason Code			
Effective Sequence 0					Approval Status Approved			
Current Budget								
Head Count 0					Amount 0.000			
Current Budget FTE 0.00								
Incumbents								
Update Incumbents	Yes							
Include Salary Plan/Grade	No							
Force Update for Title Changes	No							
Current Incumbents								1 row
Name	Empl ID	Empl Record	Full/Part	Stnd Hrs/Wk	Effective Date	Action	Action Reason	Override Position Data	Job Data
Ian Canfield	KC0048	0	Full-Time	40.00	11/04/2008	Data Change		Y	Job Data

Current Budget

The Current Budget group box displays the position'sHead Count,Current Budgeted FTE, and Amount.

Incumbents

Update Incumbents

Swipe to *Yes* to have the system automatically update incumbent job data on the Job Data component. The default setting for new positions is *No*. A warning appears if *Yes* is selected when you save a new position.

Note: If you use Guided Self-Service to update position data, be sure that the Update Incumbents check box is set to *Yes*. This configuration is necessary so that the position data updates made through Guided Self-Service flow through to incumbent job records. It is safe to ignore the warning that appears if the Update Incumbents check box is selected when you save a new position. For more information, see "Understanding Updates to Position Data" (PeopleSoft HCM 9.2: eProfile Manager Desktop) in the Guided Self-Service documentation.

If the employee record is using position data and Update Incumbents is set to *Yes*, 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.

If Update Incumbents is set to *No*, then the Include Salary Plan/ Grade field is unavailable.

	Note: (USF) Federal users don't currently use this field.
Include Salary Plan/Grade	Swipe to *Yes* to include the salary plan and grade in the incumbents update. When set to *Yes*, then salary plan and grade are included in the incumbent update. When you set Include Salary Plan/Grade, to *No* 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.
Force Update for Title Change	Swipe to *Yes* to make position title changes trigger the update incumbent process. If *Yes* is selected when you create a new position data row with a reason of *TTL* (Title Change) and a change to the data in the Title field, then the system creates a corresponding row in the incumbents' Job Data records. The new job data row has the action code *Position Change* and the Action Reason *Title Change.*
	Note that the job title is not actually stored on the job record. The job title that appears next to the Position Number field on the Work Location page is pulled from the position data record based on the effective date of the job data row. So if Force Update for Title Change is set to *No* and no new job data row is created, the title shown on the job data row is based on the previous effective date, which is why the old title continues to appear.

Current Incumbents

After you assign an employee to the position, this group box displays the incumbent's employee information and a Job Data link.

Job Data	Select this link to open a new browser window and access the Job Data component for this employee. From there you can review or made changes to the employee's job data.

Manage/Create Position - Review and Submit Page

Use the (Manage Position or Create Position) - Review and Submit page (POSITION_SUMM_FL) to review a summary of the changes to this position and submit your position data for approvals.

Navigation

To access the Manage Position pages start at the <u>Position Management Dashboard</u>, select the <u>Manage Position Tile</u>, then:

- Click the Add button from the Manage/Create Position search page.

- Enter search criteria on the Manage/Create Position search page and select a position. This will take you to the <u>Position Details Page</u> where you can:

  - Click the Clone button to enter the new position number and effective date.

  - Click the Insert Row (+) button to add a new effective dated row.

  - Click the Edit (pencil) button for a row to view and update existing information.

- After accessing the Manage Position component (by navigating as specified in either of the previous bullets), click the Next button or select the Review and Submit tab from the left panel navigation steps.

Image: Manage Position - Review and Submit Page

This example illustrates the fields and controls on the Manage Position - Review and Submit page when you are updating an existing position.
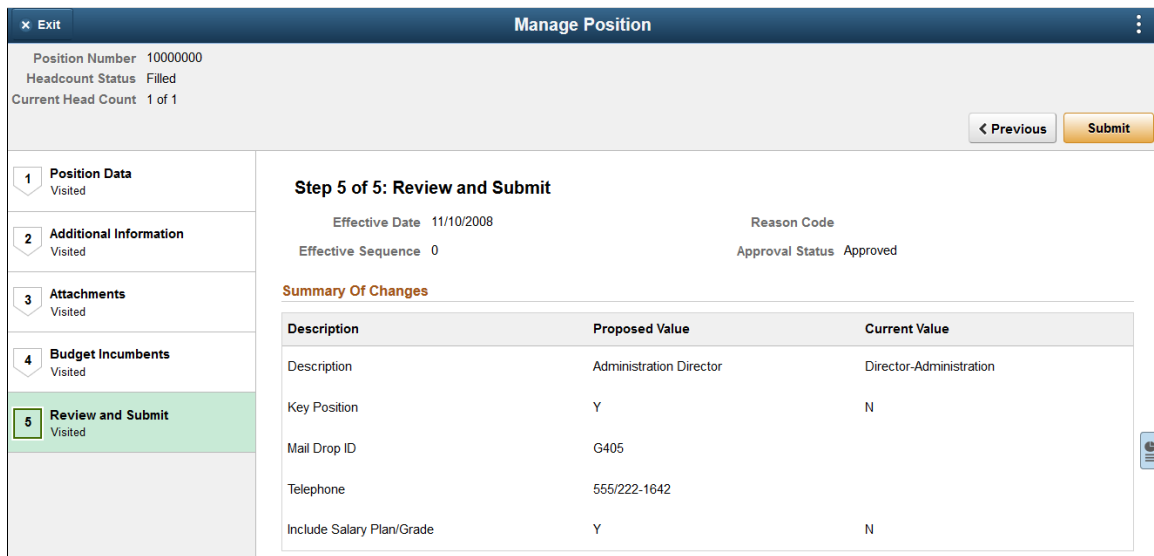
Image: Create Position - Review and Submit Page

This example illustrates the fields and controls on the Create Position - Review and Submit page when you are creating a new position.

	The Submit button appears on this page only.
Submit button	Click this button to save your position. If approvals are required for updating or creating positions, the request will be sent to the approving managers, where they will use the Pending Approvals - Create Position Page or Pending Approvals - Manage Position Page to take action on a position request.

Note: You position data will not be save until you click the Submit button. If you exit out of the Manage Position pages without submitting your changes, your data will be discarded.

When a position has been successfully submitted, the system will display the Position Confirmation Page.

Summary Of Changes

This section is available when you are viewing or updating an existing position.

Use this section to review changes you have made to a position. The page will display the proposed value side-by-side with the current value for the changed fields.

Key Information

This section is available when you are creating a new position.

Use this section to review key values you have entered for this position.

Position Confirmation Page

Use the Position Confirmation page (POS_SUB_CNF_FL) to confirm that your position updates have been submitted.

Navigation

Click the Submit button on the <u>Manage/Create Position - Review and Submit Page</u>.

Image: Position Confirmation Page

This example illustrates the fields and controls on the Position Confirmation page.

Position Confirmation					
✔ The Position Number 10000000 has been successfully submitted for approval.					

Position Number 10000000
Headcount Status Filled
Current Head Count 1 of 1

Manage Position

▼ Pending

Manage Position

⧖ Pending

Jean Parsons
Position Management Approver   ＞

Go to Position Details	Go to Manage/Create Position	Go to Position Management
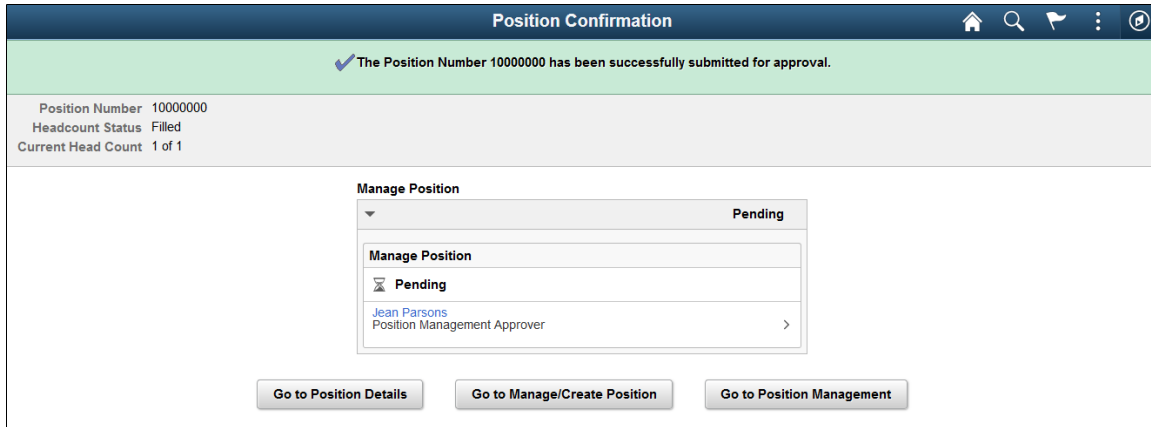
Go to Position Details button	Click this button to go to the <u>Position Details Page</u> for this position.
Go to Manage/Create Position button	Click this button to return to the <u>Manage/Create Position (Search) Page</u> and create another position or look up an existing position.
Go to Position Management button	Click this button to go to the <u>Position Management Dashboard</u> where you can set up or view summaries of Position Management data.

View Position Page

Use the View Position page (POSITION_VIEW_FL) to view a complete summary of the position details by effective date.

Navigation

- Select the View Details button from the <u>Position Details Page</u>

- Select the View Position link from the right-hand collapsible supplementary panel.

- Select the View Position Details from the <u>Pending Approvals - Create Position Page or Pending Approvals - Manage Position Page</u>

Image: View Position Page (1 of 2)

This example illustrates the View Position page (1 of 2).

Image: View Position Page (2 of 2)

This example illustrates the View Position page (2 of 2).

<< Previous and **Next >>** buttons   Click these buttons to scroll through all the effective dated rows for this position.

Fields and data found in this page map to those fields located on the various Manage Position pages.

Related Links

Manage/Create Position - Position Data Page
Manage/Create Position - Additional Information Page
Manage/Create Position - Attachments Page
Manage/Create Position - Budget Incumbents Page
Manage/Create Position - Review and Submit Page

Using Fluid Approvals to Approve Position Data

This topic describes how to approve dotted line requests using Fluid Approvals.

Fluid Approvals supports the following Position Management approval transaction types:

•   *Create Position*: When a requestor has created a new position.

•   *Manage Position*: When a requestor has updated an existing position.

For using the common Pending Approvals and Approvals History pages, see also "Using PeopleSoft Fluid User Interface Self-Service Approval Transactions" (PeopleSoft HCM 9.2: Application Fundamentals).

The following video provides an overview of Fluid Position Management:

     Image Highlights, PeopleSoft HCM Update Image 29: Fluid Position Management

Pages Used to Approve Position Data

Page Name	Definition Name	Usage
Pending Approvals - Create Position Page or Pending Approvals - Manage Position Page	EOAWMA_TXNHDTL_FL	Review and take action on position-related requests.
View Position Page	POSITION_VIEW_FL	View a complete summary of the position details by effective date.
Attachments Page	POSITION_ATT_SCF	View attachments linked to a position request

Pending Approvals - Create Position Page or Pending Approvals - Manage Position Page

Use the Pending Approvals - Create Position page or Pending Approvals - Manage Position page (EOAWMA_TXNHDTL_FL) to review and take action on position-related requests.

Navigation

Click the Approvals tile on the Manager Self-Service home page or the Notifications button in the Oracle banner to access the Pending Approvals page. Then click a *Create Position* or *Manage Position* transaction row on the Pending Approvals page.

Image: Pending Approvals - Create Position Page

This example illustrates the fields and controls on the Pending Approvals - Create Position page.

Image: Pending Approvals - Manage Position Page

This example illustrates the fields and controls on the Pending Approvals - Manage Position page.

Approval Options

The approval options on this page are common to all fluid approval transactions, as described in the documentation for the "Pending Approvals - <Transaction Details> Page" (PeopleSoft HCM 9.2: Application Fundamentals).

Approve , **Deny**, and **Pushback**	Use these buttons to take action on the requested approval.

Proposed Changes Section

Use this section to view summary information identifying each position field that was updated in the transaction that you are being asked to approve. The section will show changes requested for the position. For example, the preceding *Manage Position* screen shot displays an example of a transaction that shows three position fields that have been changed.

Additional Details Section

View Position Details	Click this link to access the View Position Page where you can review details about the position.
	Note: The approver must have access to the Position View page to review this information.

Attachment Details Section

Attachments	Click this item to open the <u>Attachments Page</u>, where you can review the attachment associated with this position.

Approver Comments and Approval Chain Sections

Approver Comments	Enter any comments related to the approval action you take.
Approval Chain	Click this item to open the Approval Chain page, where you can review information about all approvers for the transaction.

Attachments Page

Use the Attachments page (POSITION_ATT_SCF) to view attachments linked to a position request.

Navigation

Click the Attachments item row on the Pending Approvals - Create Position page or Pending Approvals - Manage Position page.

Image: Attachments Page

This example illustrates the Attachments page.
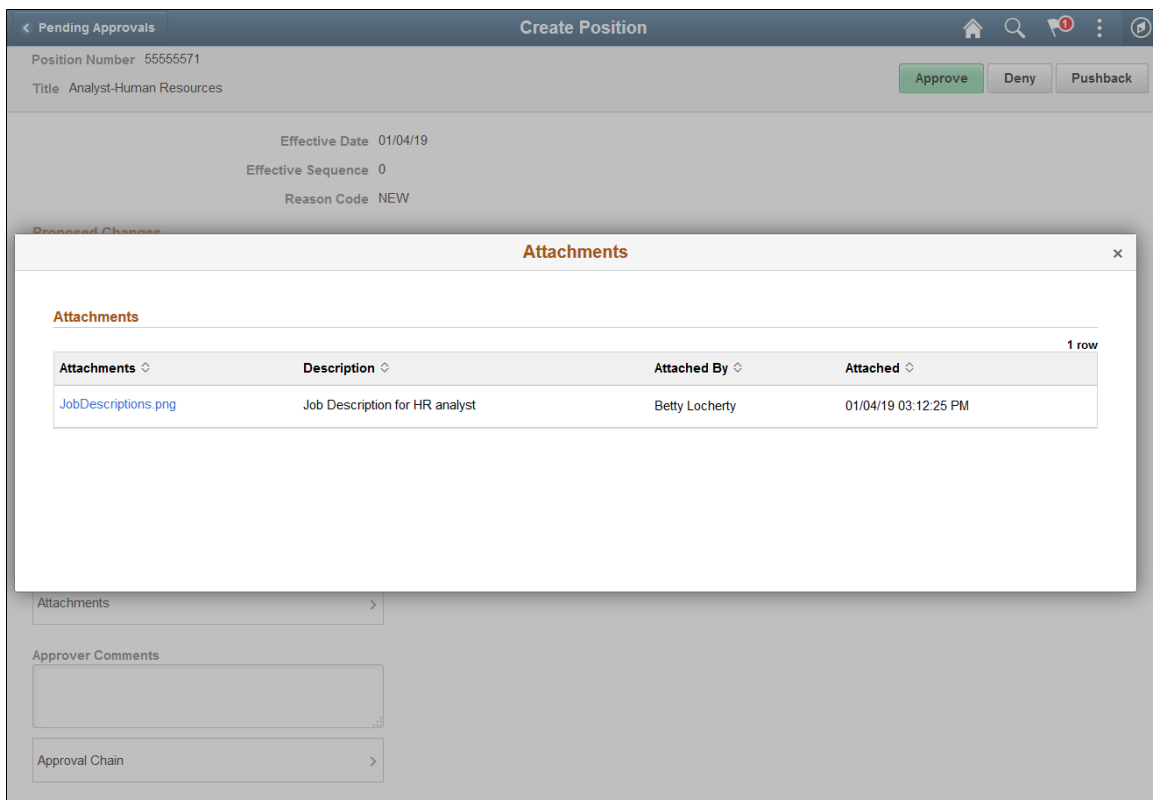
Click the Attachments link to download and view an attachment using fluid. Note that attachments are not accessible from the classic pages.

The following video provides an overview and demonstration of the Fluid Attachment framework:

 [PeopleSoft Fluid HCM Attachments](#)

Chapter 5

Managing 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.

These topics discuss how to:

- Determine where to update data.

- (USF) Update the data.

- (E&G) 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: (USF) 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.

(E&G) Changing FTE Data

Education and Government users should take care when updating position records to avoid an unexpected effect on the Job record. The following should be considered:

- To have the system automatically calculate the position FTE, select the Adds to FTE Actual Count field (so it is set to *Yes*).

- To maintain the position FTE manually, without automatic calculation, deselect the Adds to FTE Actual Count field (so it is set to *No*).

Important! Regardless of how you maintain position FTE, if you update any position data that will trigger an update to the incumbent's job data, then verify that the position FTE is accurate before you save the record, as the position FTE will be copied to Job Data FTE.

If you need to maintain a different FTE value on the employee's Job record from that which is on the Position Data, then you must do one or both of the following:

•   Deselect, or set the Update Incumbents box to *No*, in Position Data.

•   Select the Override Position Data on the employee's Job record.

Note: These actions will prevent the position data from overriding the Job FTE. Remember that you will need you will need to update the Job record manually with any appropriate changes.

Distinguishing Incumbent and Position Data

These topics discuss:

•   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.

Related Links
Creating Positions

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.

These topics discuss:

- 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.

Related Links
"Understanding PeopleSoft Security" (PeopleSoft HCM 9.2: Application Fundamentals)

Updating Incumbent Job Data

These topics discuss how to:

- Follow guidelines.

- Update job data.

- Insert new rows.

- Use the Refresh Person Org Assignments page to update Business Tile and Position Phone for the Employment Data..

- Delete rows.

- Make corrections.

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

Pages Used to Update Incumbent Data

Page Name	Definition Name	Usage
Refresh Person Org Assignments Page	PERORGASGN_REFRESH	Run the Refresh Person Org Assignments (HR_PERORGASN) batch process to update Business Title and Position Phone field values in Employment 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 topics 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 - HCM 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 appears. 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 HCM 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.

Refresh Person Org Assignments Page

Use the Refresh Person Org Assignments page (PERORGASGN_REFRESH) to run the Refresh Person Org Assignments (HR_PERORGASN) batch process to update Business Title and Position Phone field values in Employment Data.

Navigation

Set Up HCMSystem AdministrationDatabase ProcessesRefresh Person Org AssignmentsRefresh Person Org Assignments

Image: Refresh Person Org Assignments Page

This example illustrates the fields and controls on the Refresh Person Org Assignments page. You can find definitions for the fields and controls later on this page.

Image Highlights, PeopleSoft HCM Update Image 19: Mass Updates for Business Titles

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Business Title and Position Phone fields present in Employment Data get their values from the position corresponding to the current Job record, provided position data is not overridden. Use the Refresh Person Org Assignments application engine batch process to update the Employment Data record with the Business Title and Position Phone fields for future dated rows that have become current. This batch process also takes into consideration related language values. This batch process can be used as a refresh process to update data whenever required or as a nightly refresh.

Refresh Mode	Select the refresh mode to indicate what rows of data the process should update. Values include:

                                                                   •   *Incremental*: The process will update records based on incremental changes done to Job Data and Position Data.

                                                                        When you select this value, the As Of Date field becomes available.

                                                                  •   *Full Refresh*: The process will refresh data for all current active Job records.

Batch Mode	Select the batch mode to indicate how the process should execute the updates. Values include:

                                                                  •   *Bulk using SQL*: The updates are done in bulk using SQL.

                                                                  •   *Row by row using CI*: The updates are done row by row using the Component Interface.

As Of Date	Specify the date to determine the incremental changes done to Job Data and Position Data.

                                                           Note: Leave this field blank when you schedule this run control ID to run on a recurring basis. The system will use the current system date each time it runs.

                                                           This field is available when the *Incremental* option is selected for the *Refresh Mode* value.

This process will update the Business Title and Position Phone field values in Employment Data for active current Job records and Job records which have a future dated row with *HIR*, *REH*, *ADD*, and *POI* actions.

This process will also update existing related language entries with new values, delete existing entries that have become invalid, and insert new related language entries that are not present.

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	Usage
Exception/Override USF Page	RUNCTL_FGHR028	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 Page	RUNCTL_POS008	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 6

Maximizing Position Data

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 topic 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.

These topics discuss how to create departmental budgets.

- 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	Usage
Update Dept Budget Data Page	POSN_BUDGET_DATA	Establish department, job code, or position budgets.
Position Budget Detail Page	POSN_BUD_DATA_DTL	View details about the department.

Update Dept Budget Data Page

Use the Update Dept Budget Data page (POSN_BUDGET_DATA) to establish department, job code, or position budgets.

Navigation

Organizational Development > Position Management > Maintain Positions/Budgets > Update Dept Budget Data > Update Dept Budget Data

Image: Update Dept Budget Data page

This example illustrates the fields and controls on the Update Dept Budget Data page. You can find definitions for the fields and controls later on this 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.

Position Budget Detail Page

Use the Position Budget Detail page (POSN_BUD_DATA_DTL) to view details about the department.

Navigation

Click the Department Position Details link on the Update Dept Budget Data page.

Image: Position Budget Detail page

This example illustrates the fields and controls on the Position Budget Detail page. You can find definitions for the fields and controls later on this 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.

Related Links

"Setting Up Implementation Defaults" (PeopleSoft HCM 9.2: Application Fundamentals)
"Understanding Fiscal Year Budgets in PeopleSoft Human Resources" (PeopleSoft HCM 9.2: Human Resources Manage Commitment Accounting)

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.

These topics discuss how to view budget summary information.

Pages Used to View Budget Summary Information

| Page Name	Definition Name	Usage
Budget Status Page	POSN_BUDGET_STATUS	View a summary of budgeted and actual figures for departments.
Salary Components Page	COMP_POSN_BUDG_SEC	Review detailed salary information about the position incumbents at the position entry date and the position end dates.
Rate Code Details Page	WCS_RTCD_DETAILS	Display component rate code information.

Budget Status Page

Use the Budget Status page (POSN_BUDGET_STATUS) to view a summary of budgeted and actual figures for departments.

Navigation

Organizational Development > Position Management > Review Position/Budget Info > Budget Status > Budget Status

Image: Budget Status page

This example illustrates the fields and controls on the Budget Status page. You can find definitions for the fields and controls later on this page.
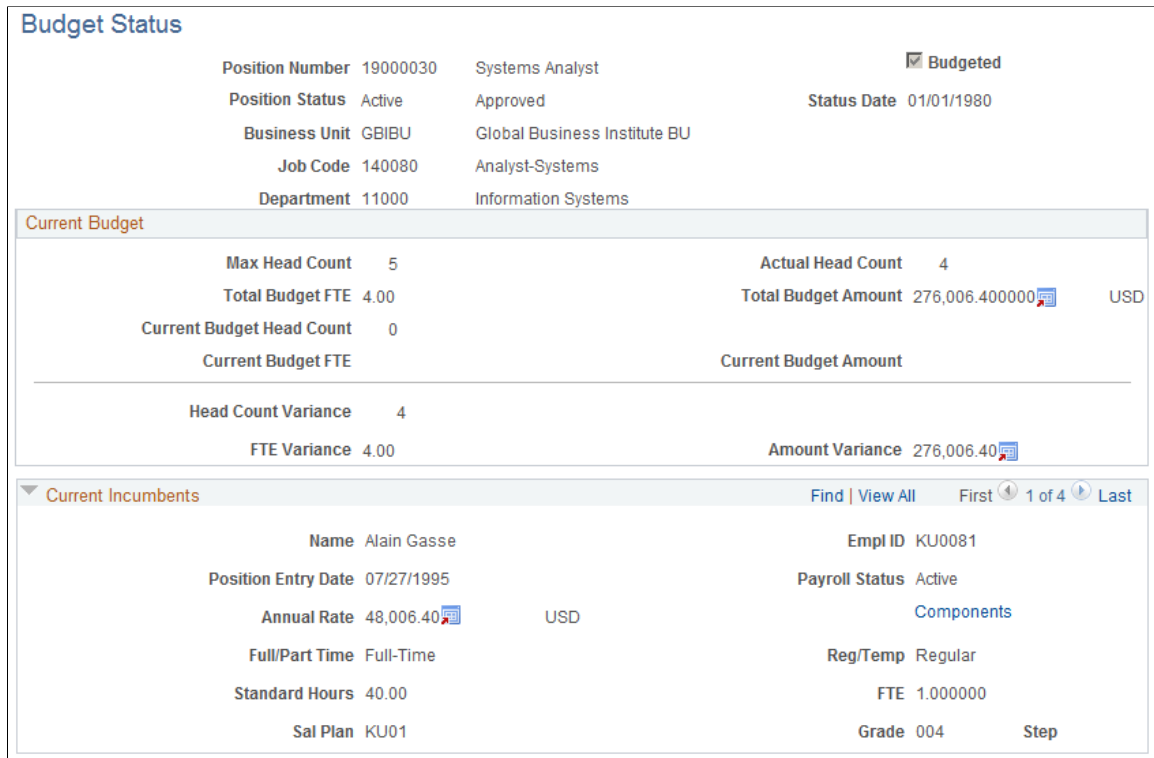
Current Budget

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.

Salary Components Page

Use the Salary Components page (COMP_POSN_BUDG_SEC) to review detailed salary information about the position incumbents at the position entry date and the position end dates.

Navigation

Click the Components link on the Budget Status page.

Image: Salary Components page: Amounts tab

This example illustrates the fields and controls on the Salary Components page: Amounts tab. You can find definitions for the fields and controls later on this page.

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.

Image: Salary Components page: Controls tab

This example illustrates the fields and controls on the Salary Components page: Controls tab. You can find definitions for the fields and controls later on this page.
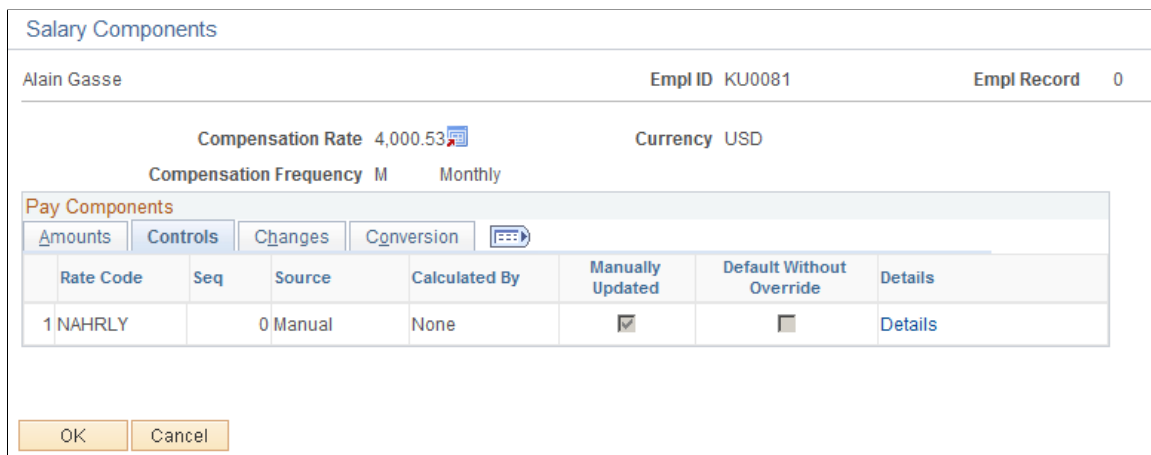
Manually Updated	Indicates that the rate for this rate code was manually updated on the Job compensation record.
Details	This link shows the rate code definition.

Changes Tab

Select the Changes tab.

Image: Salary Components page: Changes tab

This example illustrates the fields and controls on the Salary Components page: Changes tab. You can find definitions for the fields and controls later on this page.

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.

Image: Salary Components page: Conversion tab

This example illustrates the fields and controls on the Salary Components page: Conversion tab. You can find definitions for the fields and controls later on this page.

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.

Rate Code Details Page

Use the Rate Code Details page (WCS_RTCD_DETAILS) to display component rate code information.

Navigation

Click the Details link on the Controls tab of the Salary Components page.

Image: Rate Code Details page

This example illustrates the fields and controls on the Rate Code Details page. You can find definitions for the fields and controls later on this 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 topic discusses how to view department vacant position information.

Pages Used to Run Reports on Vacant Budgeted Positions

Page Name	Definition Name	Usage
Vacant Budgeted Positions Page	POSN_BUDGET_VACANT	View position information about the positions currently vacant in a department and the attendant position information.
Vacant Position - Run Control Page	PRCSRUNCNTL	Run the Vacant Position report (POS007) that lists all currently vacant, budgeted positions in your organization.

Vacant Budgeted Positions Page

Use the Vacant Budgeted Positions page (POSN_BUDGET_VACANT) to view position information about the positions currently vacant in a department and the attendant position information.

Navigation

Organizational Development > Position Management > Review Position/Budget Info > Vacant Budgeted Positions

Image: Vacant Budgeted Positions page

This example illustrates the fields and controls on the Vacant Budgeted Positions page. You can find definitions for the fields and controls later on this page.

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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 part-time) Displays if the vacant position is *Full-Time* or *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.

Related Links

"Manage Positions Reports" (PeopleSoft HCM 9.2: Application Fundamentals)

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.

These topics list common elements and discuss how to review position summary information.

Pages Used to View and Run Reports of Position Summary Information

Page Name	*Definition Name*	*Usage*
Position Summary Page	POSITION_SUMMARY	View general current and historical information about a position.

Page Name	Definition Name	Usage
Position History Page	POSITION_HISTORY	View information on incumbents currently and previously assigned to a position.
Position History - Current Position Data Page	CURRENT_POSN_DATA	View current position details.
Position History - Salary Components Page	COMP_POSN_HIST_SEC	View detailed salary information about the position incumbents at the position entry date or the position end dates.
Position Status Page Active Position History Page	RUNCTL_ASOFDATE	Run the Position Status report (POS001), which inventories the types of positions in your organization, and lists all filled and vacant positions. Run the Active Position History report (POS004), which report lists all current and historical data related to a position, for all active positions in the organization.
Active/Inactive Positions Page	RUNCTL_POS002	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.
Active/Inactive Positions USF Page	RUNCTL_FGHR025	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.
Incumbent History Page	RUNCTL_ASOFDT_COMP	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)
Incumbent History USF Page Active Position History USF Page	RUNCTL_FGASOFDT	Run the Incumbent History USF report (FGHR026), which 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. Run the Active Position History USF report (FGHR027), which lists all current and historical data related to a position, for all active positions in the organization.

Common Element Used to View and Run Reports of Position Summary Information

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

Position Summary Page

Use the Position Summary page (POSITION_SUMMARY) to view general current and historical information about a position.

Navigation

- Organizational Development > Position Management > Review Position/Budget Info > Position Summary > Position Summary

- Click the Position Management tile from the Workforce Administrator home page in fluid to access the Position Management Dashboard, then click the Position Administration Tile.

Image: Position Summary page: General tab

This example illustrates the fields and controls on the Position Summary page: General tab. You can find definitions for the fields and controls later on this page.

Position Summary

Position Number 19000003   Manager-Compensation/Benefits

Position Data

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

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.

Position History Page

Use the Position History page (POSITION_HISTORY) to view information on incumbents currently and previously assigned to a position.

Navigation

• Organizational Development > Position Management > Review Position/Budget Info > Position History > Position History

• Click the Position Management tile from the Workforce Administrator home page in fluid to access the Position Management Dashboard, then:

   • Click the Position Administration Tile, then select the Position History tab from the left navigation panel.

   • From the Manage Position Tile and access or create a new position. Access the supplemental panel on the right of the Manage Position pages and click the Position History link.

Image: Position History page

This example illustrates the fields and controls on the Position History page. You can find definitions for the fields and controls later on this 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 <u>Position History - Salary Components Page</u>. 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 displayed 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.

Position History - Current Position Data Page

Use the Position History - Current Position Data page (CURRENT_POSN_DATA) to view current position details.

Navigation

Click the Current Position Data link on the Position History page.

Image: Position History - Current Position Data page

This example illustrates the fields and controls on the Position History - Current Position Data page. You can find definitions for the fields and controls later on this 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.

Position History - Salary Components Page

Use the Position History - Salary Components page (COMP_POSN_HIST_SEC) to view detailed salary information about the position incumbents at the position entry date or the position end dates.

Navigation

Click the Components link on the Position History page.

Image: Position History - Salary Components page

This example illustrates the fields and controls on the Position History - Salary Components page.

Salary Components								×
Larry McKinley				ID KU0112				Empl Record 0
	Compensation Rate 6,600.00			Currency USD				
	Compensation Frequency M Monthly Monthly							

Pay Components

Amounts	Controls	Changes	Conversion	||▶				
Rate Code	**Seq**	**Comp Rate**	**Currency**	**Frequency**	**Points**	**Percent**	**Rate Code Group**	
1 NAANNL	0	79,200.00	USD	Annual				

OK	Cancel

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.

Related Links

Salary Components Page

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.

These topics discuss 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 topic 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.
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.

Field	Value
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 the product documentation for *PeopleTools: Tree Manager*

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 topic discusses how to run the Organizational Structure report.

Pages Used to Run the Organizational Structure Reports

Page Name	Definition Name	Usage
Build Position Structure Page	RUNCTL_ASOFDATE	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.

Page Name	Definition Name	Usage
Create Organizational Report Page	RUNCTL_POS006	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.

Create Organizational Report Page

Use the Create Organizational Report page (RUNCTL_POS006) to 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.

Navigation

Organizational Development > Position Management > Create Organization Structure > Create Organizational Report > Create Organizational Report

Image: Create Organizational Report page

This example illustrates the fields and controls on the Create Organizational Report page. You can find definitions for the fields and controls later on this 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.