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PeopleSoft HCM 9.2: PeopleSoft Human Resources Manage Positions

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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.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft 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. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help Website.

Locally Installed PeopleSoft Online Help

If you're setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the Oracle Software Delivery Cloud.

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment, and the documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, see Configuring Context-Sensitive Help Using a Locally Installed Online Help Website.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. 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.
& (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.

Typographical Convention	Description
⇒	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

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.

- Managing hosted Online Help.

- Managing locally installed PeopleSoft Online Help.

PeopleSoft HCM Related Links

Oracle Help Center

PeopleSoft Online Help Home

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

HCM Abbreviations

PeopleSoft Spotlight Series

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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" (Application Fundamentals)

"Entering Company Information" (Application Fundamentals)

"Maintaining Departments" (Application Fundamentals)

"Classifying Jobs" (Application Fundamentals)

"Setting Up Federal HCM Control Tables" (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

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

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

Updating Position Changes in the Job Data Component

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

*   The position is active.

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

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

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

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

Updated Field In Position Data Component	Updated Field In Incumbent's Job Record
Adds to FTE Actual	Adds to FTE Actual (E&G only)
Business Unit	Business Unit Department 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

Updated Field In Position Data Component	Updated Field In Incumbent's Job Record
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
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
"Changing Job Data" (PeopleSoft Human Resources Administer Workforce)
"Setting Up Implementation Defaults" (Application Fundamentals)
"Understanding Job Data" (PeopleSoft Human Resources Administer Workforce)
"Understanding the Process of Updating Person and Job Information" (PeopleSoft Human Resources Administer Workforce)
"Understanding PARs" (PeopleSoft Human Resources Administer Workforce)
"Understanding the Administering PAR System" (PeopleSoft 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:

• **Set Up HCM** > **Product Related** > **Organizational Development** > **Define Occupation Series** > **Define Occupation Series**

• **Organizational Development** > **Position Management** > **Define Position Data USF** > **Occupation Series report USF** > **Occupation Series report USF**

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.

Field or Control	Description
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:

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

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

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.

Field or Control	Description
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**

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 Standard Table	**Classification Factor Table**	Classification Level Table	Grade Conversion Table

Classification Standard SENIOR
Pay Plan/Series/Supv

Classification Standard Information   Find | View All   First ⊕ 1 of 1 ⊕ Last

Effective Date 01/01/2014   Active

Classification Factor Details   Find | View All   First ⊕ 1 of 1 ⊕ Last

*Classification Factor 06 🔍   Personal Contacts   ➕ ➖
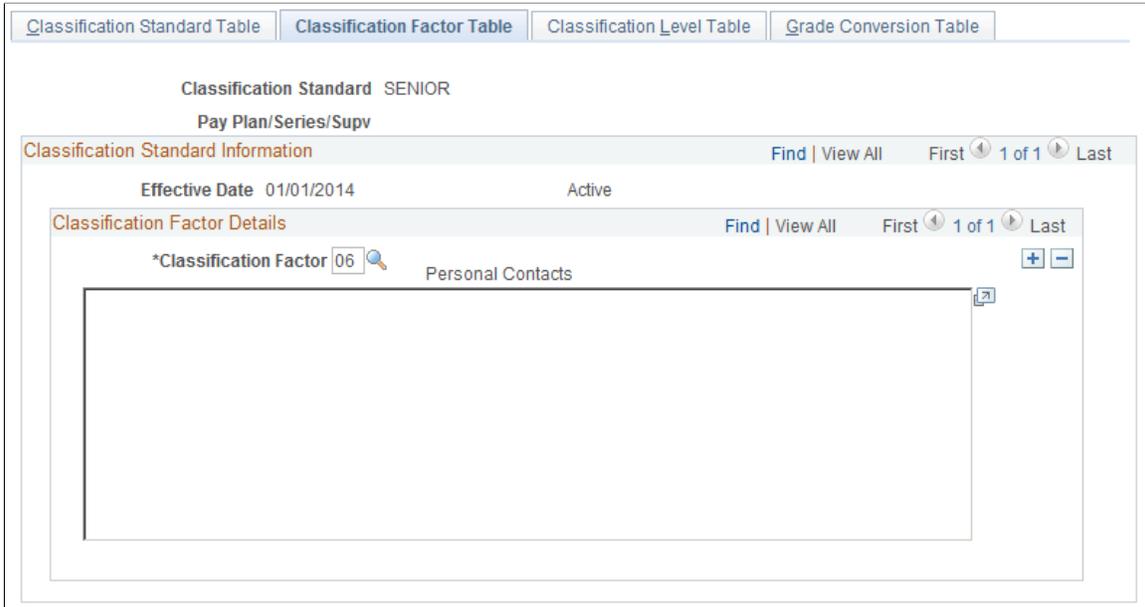
Field or Control	Description
Classification Factor	Select the classification factor to associate with the classification standard from the list of available options. You can associate multiple classification factors with this classification standard by inserting more rows.

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:

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.

Field or Control	Description
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**

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.

Field or Control	Description
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**

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

Cyber Security Specialty

Field or Control	Description
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

Field or Control	Description
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:

Set Up HCM > Product Related > Organizational Development > Cyber Security Specialty USF > Cyber Security Specialty USF

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 Position Title 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**

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.

Field or Control	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 Position Title 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 Position Title** > **Organizational Position Title**

•   **Organizational Development** > **Position Management** > **Define Position Data USF** > **Organizational Position Title** > **Organizational Position Title**

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 eProfile Manager Desktop) and "Performing Guided Self-Service Transactions in Manager Self-Service" (PeopleSoft eProfile Manager Desktop).

This topic gives an overview of the Manage Position search and add pages and 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.
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.

Note: Position Data pages have been replaced by equivalents pages in Fluid. For more information, see Creating Positions Using Fluid.

Understanding the Manage Position Search and Add Pages

With Position Management, you have the option to select from two different types of search pages: the standard PeopleTools delivered search page or the Enterprise Components configurable search page.

- Standard search page

  The standard delivered search page displays a set configuration. You can search by position number, description, or status of the position search results by business unit.

  Important! PeopleSoft Position Management delivers a configurable search page for Position Management to use in place of the PeopleTools standard search. In order to use the standard search page, the configurable search for the *Manage Position* content reference under *Organizational Development* foro the classic pages must be set to *Inactive*.

  For more information on standard search pages and pivot grids, see the *PeopleTools: Applications User's Guide*, "Retrieving Data Using Keys, Search Pages, and PeopleSoft Search Technology" and the *PeopleTools: Pivot Grids* documentation.

- Configurable search page

  The configurable search page takes advantage of the Configurable Search functionality, and gives your organization the ability to define how the search page will perform and what should be the search page layout. You have control over which fields should appear as criteria and search results, as well as their field order, allowing you to search for and locate positions using other means, such as location, department, or job code.

  With this framework, administrators can configure a search to:

  - Use Basic or Advanced Searches.

- Configure a keyword search.

- Use either a Search Record or Search Definition.

- Include a one-click search using the criteria from previous or frequent searches.

- Allow you to save your search criteria and easily reuse a saved search.

- Configure Search Criteria and Search Results fields and their order per your organization requirements.

- Use Correct History and Include History to access Position Data as per data entry requirements.

- Configure the behavior of the 'Add New' button and page when creating a new position.

This example illustrates the fields and controls on the Manage Position - Search Criteria page when using the configurable search page.

This example illustrates the fields and controls on the Manage Position - Search Criteria page showing the search results.

Important! The Position Management content references for classic and fluid are delivered with an *Inactive* status on the "Search Configuration Page" (Application Fundamentals). The configurable searches must be set to *Active* for the *Manage Position* content references to use this search page.

Note: The page name may vary based on the search configuration.

Field or Control	Description
  (icon link)	Click this button to open the page to create a new position.
Include History	Select to retrieve all rows for this position. Although you can view all the rows, you cannot make corrections to historical rows in this mode. **Note:** Update/Display is the default mode that gets applied if Include History or Correct History is not selected. You can add a new top row in this mode but you cannot view historical rows. Availability to access modes are based on your security access and modes may not be available for all users.

Field or Control	Description
Correct History	Select to retrieve all rows for this position. In this mode you can make corrections to historical rows.
Advanced Search or **Basic Search** links	Click these links to toggle between the Basic and Advanced Search pages. Access to these links and pages is based on the configuration settings. The search page can have access to just the Basic, Advanced, or both Basic and Advanced Search pages.

For an explanation of additional fields and controls that may appear on a configurable search page, see the Setting Up Search Configuration, "<Transaction Search or Add> Page" (Application Fundamentals) documentation.

You can configure the page to include elements such as saved searches, recent searches, search results, and more. For more information on setting up configurable searches, see "Setting Up Search Configuration" (Application Fundamentals).

This video provides an overview of the configurable search and add pages for Position Management:

Video: Image Highlights, PeopleSoft HCM Update Image 39: Configurable Search for Fluid Position Management

Using the Add / Create Pages

In Position Management, you add new positions directory from the search page. Consider the following to add a new position:

* From the standard search page:

   Select the + **Add** button from the search page to use the standard search Create Position page (POSITION_CREAT_SBF).

   Enter a position number and effective date for a new position.

* From the configurable search page:

   Select the + **Add New** icon link from the search page to use the configurable search create page (EOSF_SRCH_FL). Note that the page name will vary based on the "Add Configuration Page" (Application Fundamentals) setup for the Manage Position content reference in Fluid.

   Field options are based on the configuration of the "Add Configuration Page" (Application Fundamentals) but should include entering a position number and effective date for a new position.

When you add 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.

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**

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.

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

Field or Control	Description
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.

Field or Control	Description
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

Field or Control	Description
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" (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.

Field or Control	Description
Title	This field displays a title for the selected position. This field is defaulted from the title associated with the job code. 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

Field or Control	Description
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.

Field or Control	Description
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

Field or Control	Description
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

Field or Control	Description
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

Field or Control	Description
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

Field or Control	Description
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

Field or Control	Description
Package Template ID	Select a salary package template ID.
Package Rule ID	Select a salary package rule ID.

(CAN) Canada

Field or Control	Description
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:

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.

Field or Control	Description
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.

Field or Control	Description
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 Job code 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 primary 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.

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**

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.

Field or Control	Description
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.

Field or Control	Description
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 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.

Field or Control	Description
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 **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.
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. For the Remote Worker functionality in Fluid, select this check box to enable the Remote Worker tile for employees that hold this position and have been granted the *Fluid Remote Worker Employee* role. These videos provide an overview of the Fluid Remote Worker feature: Video: Image Highlight, PeopleSoft HCM Update Image 40: Remote Worker Video: PeopleSoft Remote Worker

(E&G) Education and Government

Field or Control	*Description*
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**

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.

Field or Control	Description
Current Budget	The **Current Budget** group box displays the position's **Head Count, Current Budgeted FTE,** and **Amount.**

Field or Control	Description
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.
Federal Position Titles - Run Control Page	PRCSRUNCNTL	Run the Position Title Table report (FGPER815) to list the Position Title Table records.
Federal Job Codes - 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.
Optional Form 8 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 and enable primary incumbent functionality, use the Position Data Installation (INSTALLATION_POSN) component.

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

The following video provides an overview of Fluid Position Management configuration:

Video: Image Highlights, PeopleSoft HCM Update Image 37: Usability Enhancement for Fluid Position Management

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.

Implementing and Maintaining Fluid Position Management

Important! You should be on People Tools 8.55 or above, to use Fluid Position Management.

To initiate and use Fluid Position Management, the following steps should be taken:

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

2. Synchronize Page Composer metadata with the Installation settings by navigating to **Enterprise Components** > **Page Composer Administrator** > **Installation Administration**, and click the **Synchronize with Installation** button as part of enabling Fluid Approvals.

3. Run the following one-time processes to synchronize data from classic to fluid Position Management records:

   (Navigate to **PeopleTools** > **Process Scheduler** > **Schedule Process Requests**)

   • *Sync Fluid Position Data* (POS_SYNC_FLU): Synchronizes Position Management data to the fluid records.

   Note: This should be run in two-tier mode.

This will carry forward the customizations from your existing Position Management system—adding the custom fields to the new effective sequence record.

- *Sync Incumbents* (POSN_PRI_SYNC): Assigns a primary incumbent for every position in the database, where incumbent is available for a position.

Note: You do not need to run *Sync Incumbents* (POS_PRI_SYNC) to use Fluid Position Management. This process is needed only if you are using the Manage Primary Incumbents feature.

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4. Run the *Nightly Refresh Primary Incumb* (POSN_PRI_AE) process on a regularly scheduled basis, or manually as needed, to maintain the current Position Management primary and incumbent information.

Note: You do not need to run *Nightly Refresh Primary Incumb* (POSN_PRI_AE) to use Fluid Position Management. This process is needed only if you are using the Manage Primary Incumbents feature.

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5. Assign the Fluid Position Management permission lists and roles, as needed:

Role or Permission List	*Usage*
Manage Positions Fluid (HCCPHRFL3100) permission list	Grants a user access to the Manage Position pages in fluid. Position Management • Manage Position • Position View Details • Related Information Guided Processes Menu • Grouplets • My Preferences • My Personalizations
Primary Incumbent Admin role	Grants the user Manage Primary Incumbent functionality access in fluid, if applicable. --- **Note:** Manage Primary Incumbent is a configurable feature for those who use Fluid Position Management but it's not mandatory. ---
Position Delete Administrator role	Allows the user to delete position data in fluid.

Note: Oracle highly recommends that once you begin using PeopleSoft Fluid Position Management, you should continue to use only the Fluid Manage Position pages to create and maintain positions. You should not use the classic Position Management interface pages (for example, the Add/Update Position Data component) for data entry. If for any reason you made changes using classic Position Data, rerun the *POSN_SYNC_FLU* to ensure the classic position data and fluid position effective sequence records are in sync.

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**

This example illustrates the fields and controls on the Position Management Installation page.

Field or Control	*Description*
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 <u>Manage Position Tile</u>, 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 assign the *Manage Positions Fluid* (*HCCPHRRFL3100*) permission list to the administrator role managing positions. **Important!** When you first enable Fluid Position Management functionality, you will need to run the one-time *Sync Fluid Position Data* (POS_SYNC_FLU) process to synchronize Position Management data from the existing classic records to the fluid records. See <u>Implementing and Maintaining Fluid Position Management</u>.
Manage Primary Incumbent	Manage Primary Incumbent is a configurable feature for those who use Fluid Position Management but it's not mandatory. Select to identify and track primary incumbents for your positions. This option is deselected (off) by default. If this option is deselect, when a user clicks the <u>Manage Primary Incumbents Tile</u>, the system will issue a warning that the user is not authorized to access the component and to enable Manage Primary Incumbent on this Installation table. **Note:** To track primary incumbent information, you must enable Fluid Position Management by selecting the **Fluid Position Management** check box on this page. When you select this check box, the page displays the **Primary Incumbent Selection Method** section on this page. The primary incumbent selection method allows you to use the delivered selection method, or override the delivered method and use a method that suits your organization requirements to identify primary incumbents. **Note:** To grant users Manage Primary Incumbent functionality in fluid, you must assign the *Primary Incumbent Admin* role to the administrator managing primary incumbents. **Important!** When you first enable the Manage Primary Incumbent functionality, you will need to run the one-time *Sync Incumbents* (*POSN_PRI_SYNC*) process to bring data from classic position management and have the system assign a primary incumbent for every position in the database wherever an incumbent is available for a position. Then run the *Nightly Refresh Primary Incumb* (POSN_PRI_AE) on a regular basis. See also <u>Implementing and Maintaining Fluid Position Management</u>.

Primary Incumbent Selection Method

This section is available when you select the **Manage Primary Incumbent** check box.

PeopleSoft Position Management delivers logic to auto assign a primary incumbent when the current primary incumbent leaves the position. You can accept the delivered logic, or use this section to enter your own custom app class method to define the selection logic.

Field or Control	Description
Override default section method	Select this check box to override the delivered logic of auto assigning a primary incumbent. This opens up the remaining fields in this section. Deselect to use the system delivered logic. **Note:** PeopleSoft selects the primary incumbent based on the same logic used in Job Data to show the Reports To manager information on the Job Data - "Job Information Page" (PeopleSoft Human Resources Administer Workforce), which selects the top most employee in the list of current incumbents.
Package Name	Select the ID of the application package that contains the method selection logic.
Path	Enter a path that uses a specific class within the package.
Class Name	Enter the name of the application class that contains the selection logic. **Note:** This application class method should retrieve an Empl ID that assigns this employee as the primary incumbent.
Method	Enter the method name of the application class ID that identifies the selection logic.

Running the Nightly Refresh Primary Incumbent Process

Important! You will need to run the *Nightly Refresh Primary Incumb* (*POSN_PRI_AE*) process on a regularly scheduled basis, or manually as needed, to maintain the current primary and incumbent information.

Approval Options

Use this section to configure approval related information for Fluid Position Management. You can define if approval is needed when creating or adding position data rows, when correcting existing position data rows, or for both.

Note: Approvals need to be enabled to use this functionality.

Field or Control	Description
Create Position and **Process ID**	Select to require approvals when a new position data row is added. Then, associate the approval process ID that should be used when entering new position data. The **Process ID** field is required if you have enabled the **Create Position** approval option. When you enable the approval check box, the process ID will prepopulated with the *NewPositionApproval* transaction, but you can override this.
Edit Position and **Process ID**	Select to require approvals when any position data is corrected. Then, enter the approval process ID that should be used when editing position data. The **Process ID** field is required if you have enabled the **Edit Position** approval option. When you enable the approval check box, the process ID will prepopulated with the *PositionApproval* transaction, but you can override this.

Note: You can associate the same process ID for the above mentioned Approval options.
If you enter your own approval process definition ID for creating a new row or for updating existing position data, you will also need to update the Approval Process definition ("Defining the Setup Process Definitions Component" (Approval Framework)), the Page Composer setup ("Understanding Page Composer" (Enterprise Components)), and Mobile Approvals options.

Field or Control	Description
Go to approval setup	Click this link to open a new browser window and access the approval setup "Register Transactions Page" (Approval Framework). You can then view or update the existing registered approval transaction setup for the process ID you entered. When no ID is entered, the system will direct you to the Register Transactions search page where you can review all transaction registries.

On the submission of a position transaction, the approval chain will appear on the following pages:

- Position Confirmation Page.

- Position Details Page, through the Approval Chain column and link.

  Status values on this page reflect the statuses as applicable for approvals.

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

Related Links

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 Homepages" (Application Fundamentals).

The following videos provide an overview of Fluid Position Management:

Video: PeopleSoft Fluid Position Management

Video: 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.

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.

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.

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.

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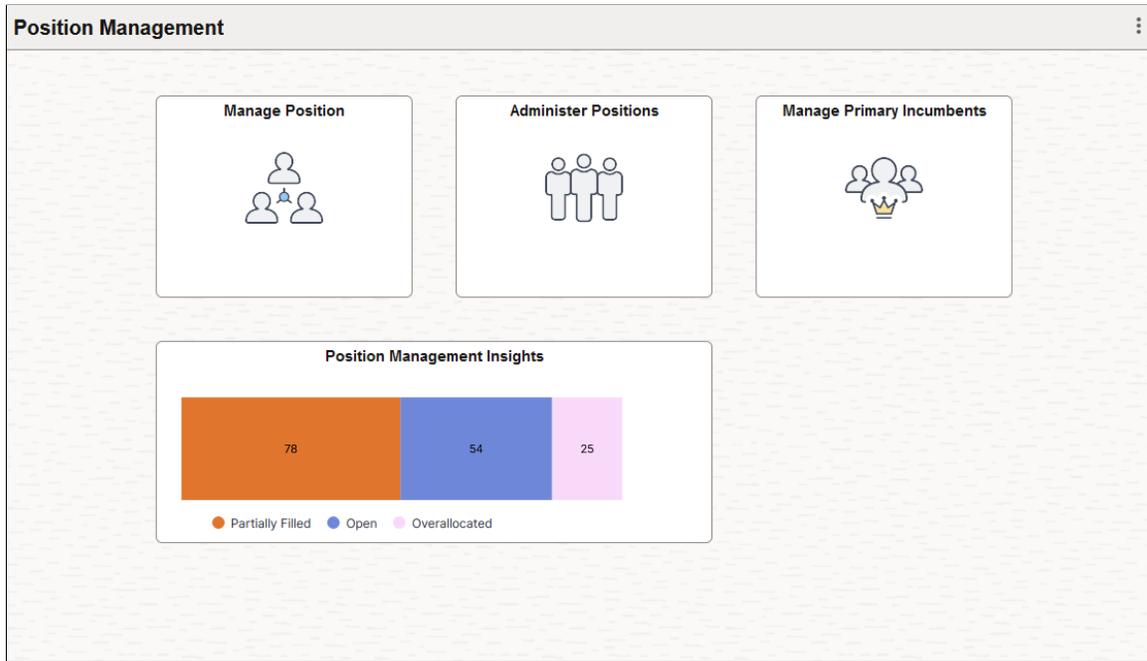
This Position Management dashboard enables administrators to access frequently-used Position Management components from one location.

Use the links in the table to access complete documentation for each tile transactions.

Tile Name	Usage
Manage Position Tile	Create and manage positions using the fluid pages.
Administer Positions Tile	View current and historical summary information, including incumbent history using the following classic pages: • Position Summary Page • Position History Page
Manage Primary Incumbents Tile	Manage primary incumbent information for a position.
Position Management Insights Tile	Access and view position management analytics.

Related Links

Creating Positions Using Fluid
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 search and add 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 Homepages" (Application Fundamentals).

The following videos provide an overview of Fluid Position Management:

Video: PeopleSoft Fluid Position Management

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

Video: Image Highlights, PeopleSoft HCM Update Image 33: Position Management Manage Primary Incumbent

Video: Image Highlights, PeopleSoft HCM Update Image 37: Usability Enhancement for 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.
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.
Edit Position Page	POSITION_EDIT_SCF	Update the effective date and reason for an existing row, if needed.

Page Name	Definition Name	Usage
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.
Current Incumbents Page	POSN_INCUM_DAT_SCF	View the reports to incumbents for a 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.
View Position Page	POSITION_VIEW_FL	View a complete summary of the position details by effective date.

Understanding the Manage Position Search and Add Pages

Fluid Position Management supports the use of the standard PeopleTools Configurable Search.

Field or Control	*Description*
+ Add button	Select the **+ Add** button from the search page to use the standard search Create Position page (POSITION_CREAT_SBF). Enter a position number and effective date for a new position.
Include History	Select to retrieve all rows for a position. Although you can view all the rows, you cannot make corrections to historical rows in this mode. **Note:** Update/Display is the default mode that gets applied if Include History or Correct History is not selected. You can add a new top row in this mode but you cannot view historical rows. Availability to access modes are based on your security access and modes may not be available for all users.
Correct History	Select to retrieve all rows for this position. In this mode you can make corrections to historical rows.

Using the Create Position Pages

In Position Management, you add new positions directly from the search page.

When you add 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.

Manage Position Tile

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

Navigation:

From the "Workforce Administrator Homepage" (Application Fundamentals) in fluid, click the Position Management Tile to access the Position Management Dashboard.

The Manage Position tile is delivered 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.

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.

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 a position from the search page.

This example illustrates the fields and controls on the Position Details page.
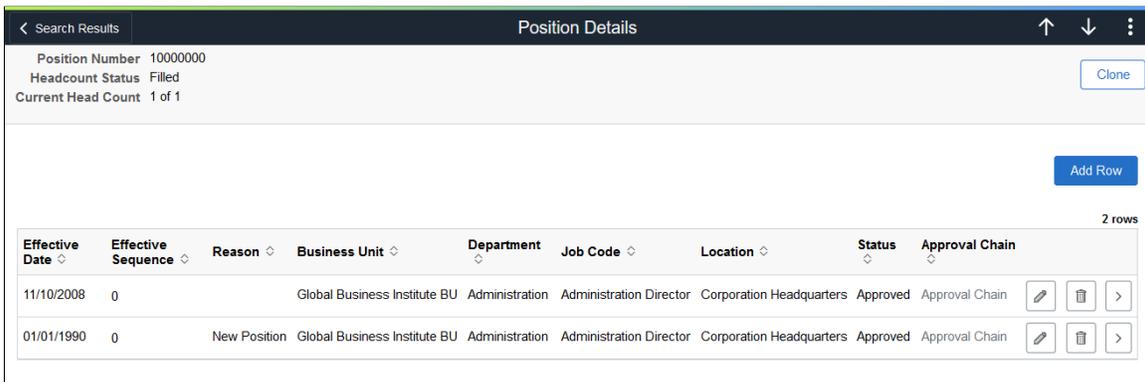
The position header (gray sub-banner) displays the unique number assigned to the position as well as the headcount status information. When you add or clone a position, you can specify the position number when creating a new position or you can enable the system to assign the next number for you (when you save) by accepting the default value 00000000.

Modifying the Effective Date of a row will not modify the Effective Sequence in the remaining rows automatically

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.

Field or Control	Description
![up arrow] (Previous in List) and ![down arrow] (Next in List) icon buttons	Click the up and down arrow icon buttons to scroll through the position search results list that was generated in previous step of this process.
Clone (Clone) button	Click to clone the properties of this position. The system will open the Clone Page where you will enter a new position number and effective date.
Add Row (Add 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.

Note: (Configurable Search users) When accessing this page, the default view will display in Update/ Display mode, showing only current and future rows. To view historical rows, you must select either the Include History or Correct History check box. Availability to access modes are based on your security access and modes may not be available for all users.

Field or Control	Description
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 icon] Edit button	Click this button for an effective dated row to access the Manage/Create Position - Position Data Page and view or update this position.
![delete icon] Delete button	Click to remove this effective dated row.
![view detail icon] View Detail button	Click the View Details button to access the View Position Page 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>.

This example illustrates the Clone page.

Field or Control	Description
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.

Administrators use this page to initiate a correction of an existing Position Data row. They can also correct the **Effective Date** as part of the correction process.

Navigation:

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

This example illustrates the Request Details page.

Field or Control	Description
Effective Date	Update the effective date if it needs to be changed as part of the correction process.
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.

Edit Position Page

Use the Edit Position page (POSITION_EDIT_SCF) to update the effective date and reason for an existing row, if needed.

Navigation:

Click the Edit (pencil) button from the Position Details Page.

This example illustrates the Edit Position page.

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 header, 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" (Enterprise Components) documentation.

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:

Field or Control	Description
✕ Exit (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 Page 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.

Field or Control	Description
‹ Previous 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 › 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 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 header (sub-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.

Field or Control	Description
<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:

Video: Image Highlights, PeopleSoft HCM Update Image 18: Simplified Analytics

Video: PeopleSoft Simplified Analytics

Navigation:

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

This example illustrates the supplementary panel options for the Manage Position pages.

Field or Control	Description
(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. • Manage Primary Incumbents Click this link to open the Manage Primary Incumbents Page in a new browser window where you can identify and manage primary incumbents for this position. **Note:** This link is available when primary incumbents is enabled on the Position Management Installation Page. **Note:** Users will need security access to these pages to view or update information.

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" (Enterprise Components)

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 Position Management Dashboard, select the Manage Position Tile, then do one of the following:

- Click the **+ Add** button from the Manage/Create Position search page to add a new position.

- 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 **Add Row** button to add a new effective dated row.

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

This page displays first by default, or click the **Previous** button or select the Position Data tab from the left panel navigation steps if you have moved to another page.

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

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

Work Location

*Reg Region	USA	United States	Company	GBI Global Business Institute 9999
*Department	27000	Customer Service	Dot-Line	
Location	KUOK00	Oklahoma	Security Clearance	
Reports To	10000004	Director-Customer Services		

View Current Incumbents

Supervisor Level

Salary Plan Information

Salary Admin Plan	KU01		Grade	004
Standard Hours	40.00		Step	
Work Period	W	Weekly		

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.00	8.00	8.00	8.00	8.00		

▼ **Specific Information**

Mail Drop ID		Telephone	
Health Certificate		Signature Authority	

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

▼ **USA**

FLSA Status	Nonexempt
Bargaining Unit	8888

▼ **Germany**

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

From Grade		To Grade	
Step		Step	

▼ **Australia**

Salary Packaging

Package Template ID	
Package Rule ID	

▼ **Canada**

Employment/Labour Std Status	Non-Exempt

Position Information

Field or Control	Description
Filed Status	Indicate when the position is *Approved, Frozen,* or *Proposed.*

Field or Control	Description
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 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. For the Remote Worker functionality in Fluid, select this check box to enable the Remote Worker tile for employees that hold this position and have been granted the *Fluid Remote Worker Employee* role.

Job Information

Field or Control	Description
Business Unit	Enter the business unit for the position.

Field or Control	Description
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" (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 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.

Field or Control	Description
Description	Enter a detailed position description, if required, for this position.

Work Location

Field or Control	Description
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. Click the **View Current Incumbents** link next to this field to view persons assigned to this reports to position. 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.
View Current Incumbents	This link is available when you have populated the **Reports To** field. Click this link to open the Current Incumbents Page and view incumbents of the reports to position. If no incumbent exist for this reports to position, clicking the link will create a message stating there are no incumbents,
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.

Field or Control	Description
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

Field or Control	Description
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

Field or Control	Description
Mail Drop ID and **Telephone**	Enter the mail drop ID and work phone number assigned to this position, if applicable.

Field or Control	Description
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

Field or Control	Description
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

Field or Control	Description
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

Field or Control	Description
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)

Field or Control	Description
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

Field or Control	Description
Package Template ID	Select a salary package template ID.
Package Rule ID	Select a salary package rule ID.

(CAN) Canada

Field or Control	Description
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:

Field or Control	Description
Occupational Series	Enter the occupational series that is associated with this position.

Field or Control	*Description*
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 job code 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 primary 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*.

Field or Control	Description
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.

Current Incumbents Page

Use the Current Incumbents page (POSN_INCUM_DAT_SCF) to view the reports to incumbents for a position.

Navigation:

Click the View Current Incumbents link on the Manage/Create Position - Position Data Page.

This example illustrates the Current Incumbents page.

Current Incumbents   ✕

Position Number 10000001 Manager-Compensation/Benefits

2 rows

Name	Empl ID	Empl Record
Ram Charan	0059	0
Sylena Tyler	KU0050	0

Field or Control	Description
⬤ (Primary Incumbent icon)	Indicates the primary incumbent for this reports to position. **Note:** This icon will display only when the Manage Primary Incumbent functionality is enabled on the <u>Position Management Installation Page</u> and a primary incumbent has been defined on the <u>Manage Primary Incumbents Page</u> for this reports to position.

This video provides an overview of the Manage Primary Incumbent feature:

Video: <u>Image Highlights, PeopleSoft HCM Update Image 33: Position Management Manage Primary Incumbent</u>

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 or Create Position pages, start at the <u>Position Management Dashboard</u>, select the <u>Manage Position Tile</u>, then do one of the following:

- Click the **+ Add** button from the Manage/Create Position search page to create a new position.

- 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 **Add 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, click the **Previous** or **Next** button or select the Additional Information tab from the left panel navigation steps.

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

Step 2 of 5: Additional Information

Effective Date 11/10/2008	Reason Code
Effective Sequence 0	Approval Status Approved

Education and Government

Position Pool ID   [🔍]

*Pre-Encumbrance Indicator   Encumber Immediatel ⌄

*Encumber Salary Option   Salary Step ⌄

Encumber Salary Amount   0.000

*Classified Indicator   Classified ⌄

FTE   0.000000

Adds to FTE Actual Count   (No)

(E&G) Education and Government

Field or Control	Description
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.

Field or Control	Description
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 or Create Position pages, start at the Position Management Dashboard, select the Manage Position Tile, then do one of the following:

- Click the **+ Add** button from the Manage/Create Position search page to add a new position.

- 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 **Add 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.

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

Step 3 of 5: Attachments								
Effective Date 11/09/2020				Reason Code				
Effective Sequence 0				Approval Status Not Available				
Attachments								
Add Attachment								1 row
Attachments ⬍	Description ⬍			Document Type ⬍	Category ⬍	Attached By ⬍	Attached ⬍	Status ⬍
JobDescription.png	Updated Job Description			Position Management	Position Management	Betty Locherty	11/09/20 01:06:59 PM	Active 🗑

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.

Field or Control	Description
Add Attachment **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:

Video: 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.
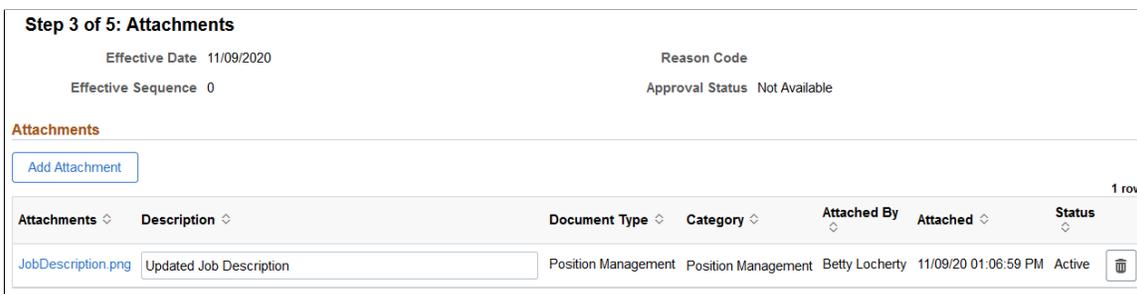
Navigation:

To access the Manage Position pages start at the Position Management Dashboard, select the Manage Position Tile, then do one of the following:

- Click the **+ Add** button from the Manage/Create Position search page to add a new position.

- 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 **Add 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, click the **Previous** or **Next** button or select the Budget Incumbents tab from the left panel navigation steps.

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

Step 4 of 5: Budget Incumbents

Effective Date 01/01/1990	Reason Code NEW New Position
Effective Sequence 0	Approval Status Approved

Current Budget

Head Count 0	Amount 0.000
Current Budget FTE 0.00	

Incumbents

Update Incumbents No
Include Salary Plan/Grade No
Force Update for Title Changes No

Current Incumbents   3 rows

	Name	Empl ID	Empl Record	Full/Part	Stnd Hrs/Wk	Effective Date	Action	Action Reason	Override Position Data	Job Data
↻	Alexa Mendosa	KU0203	0	Full-Time	40.00	12/31/2015	Pay Rate Change		Y	Job Data
	Alicia Jones	KU0205	0	Full-Time	40.00	11/22/2015	Pay Rate Change		N	Job Data
	Terry Carter	XRH1	0	Full-Time	40.00	12/12/2001	Hire		N	Job Data

Current Budget

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

Incumbents

Field or Control	Description
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 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.

Field or Control	Description
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. |

Current Incumbents

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

Field or Control	Description
(Primary Incumbent icon)	This icon is available when Manage Primary Incumbents is enabled on the Position Management Installation Page and a person has been defined as the primary incumbent.

Indicates that this person is the current primary incumbent.

To manage primary incumbents for a position see the Managing Primary Incumbent Information for a Position topic. |
| **Job Data** | Select this link to open a new browser window and access the Job Data component for this employee. From here you can review the employee's job data.

When Fluid Job Data is not enabled, the system will direct the user to the classic Job Data pages (see the "(Classic) Adding Organizational Instances" (PeopleSoft Human Resources Administer Workforce) documentation for viewing job data).

When Fluid Job Data is enabled on the "Person and Job Installation - Job Data Page" (PeopleSoft Human Resources Administer Workforce), the system will open the "Job Actions Summary Page" (PeopleSoft Human Resources Administer Workforce) in fluid, based on the access of the user. |

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 Position Management Dashboard, select the Manage Position Tile, then do one of the following:

- Click the **+ Add** button from the Manage/Create Position search page to add a new position.

- 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 **Add 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, click the **Next** button or select the Review and Submit tab from the left panel navigation steps.

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

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

Field or Control	Description
Submit button	The Submit button appears on this page only. 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:** Your position data will not be saved 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 Manage/Create Position - Review and Submit Page.

This example illustrates the fields and controls on the Position Confirmation page when approvals are turned off.
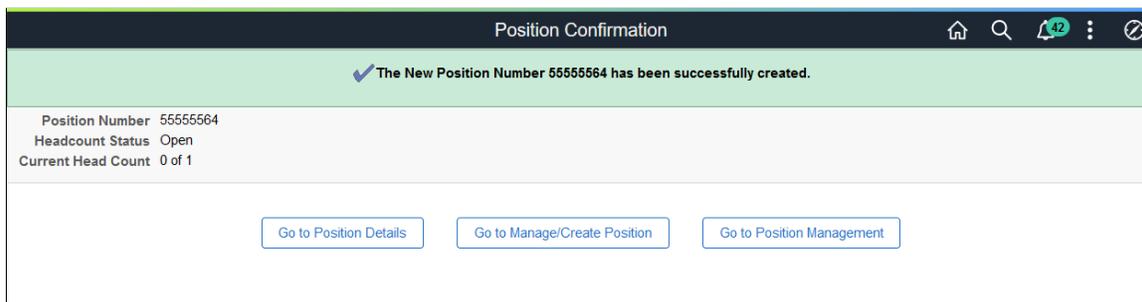
This example illustrates the fields and controls on the Position Confirmation page when approvals are required.
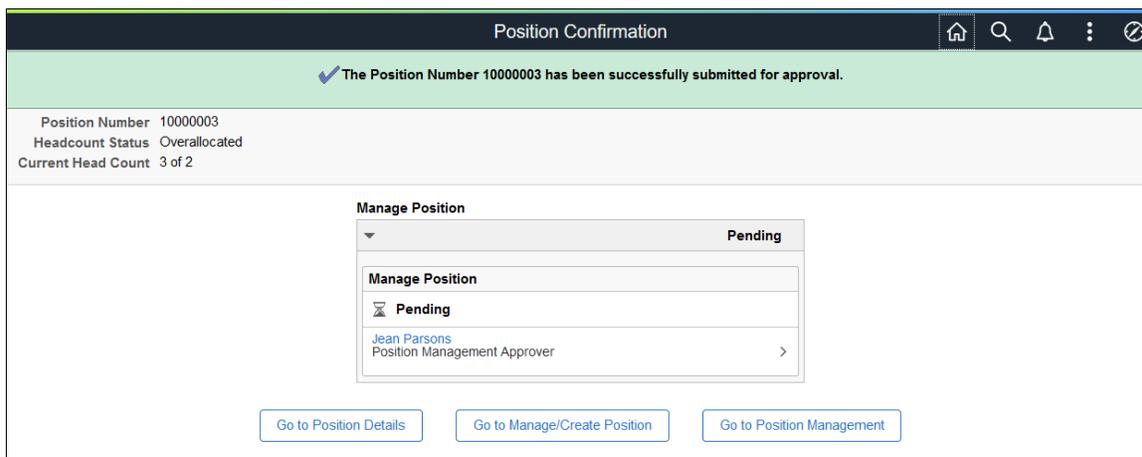
When approvals are configured and enabled on the Position Management Installation Page, the message at the top of the page will indicate that it was submit for approvals and the approval status fields will show the approval status and approval chain of the request. The position administrator can enable approvals when creating a new position or for editing an existing position.

Field or Control	Description
Go to Position Details button	Click this button to go to the Position Details Page for this position.
Go to Manage/Create Position button	Click this button to return to the search page and create another position or look up an existing position.

Field or Control	Description
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.

Approving Managers will use the <u>Pending Approvals - Create Position Page or Pending Approvals - Manage Position Page</u> to review and respond to position transaction requests.

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>

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

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

Field or Control	Description
<< 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, as listed is this documentation:

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

Viewing Position Summary Information as an Administrator Using Fluid

This topic lists the pages that administrators can access from a single location in the PeopleSoft Fluid User Interface to view position summary information.

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

Pages Used to View Position Summary Information as an Administrator Using Fluid

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

Administer Positions Tile

Use the Administer Positions tile to access a navigation collection of classic page to view current and historical summary information.

Navigation:

This example illustrates the Administer Positions tile.

Click the Administer Positions tile to access the Position Administration navigation collection.

Navigation:

This example illustrates the Position Administration navigation collection.

Use the Position Administration navigation collection pages to quickly access classic pages to view current and historical summary information, including incumbent history, from one fluid location. The left panel of this page lists the components. The right panel displays the component selected in the left panel.

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

Managing Primary Incumbent Information for a Position

PeopleSoft Fluid Position Management enables you to identify primary incumbents for your positions using the Manage Primary Incumbents page.

When the Primary Incumbents features is enabled on the Position Management Installation Page, the Direct Reports framework will take the Manage Primary Incumbent information [*4 - Reports To Position* (full Position Management), *5 - Position / Supervisor ID* (partial Position Management with supervisor ID), and *6 - Position / Dept Manager* (partial Position Management with department manager ID)] to populate the approver ID in the Direct Reports Build Process where the position manager is used for

routing or for displaying the manager. The system routes approvals to the correct incumbent of the manager position when that manager position has multiple incumbents. For example, the system will use Manage Primary Incumbent information to route guided-self service transactions or ePerformance auto-transfer documents to the appropriate position incumbent.

This topic discusses how to manage primary incumbent information for a position.

This video provides an overview of the Manage Primary Incumbent feature:

Video: Image Highlights, PeopleSoft HCM Update Image 33: Position Management Manage Primary Incumbent

Related Links
"Configuring Direct Reports Functionality" (Application Fundamentals)

Pages Used to Manage Primary Incumbent Information for a Position

Page Name	Definition Name	Usage
Manage Primary Incumbents Tile	HC_HR_MANAGE_PRI_ INCUMBENTS_FL (this is the cref for the tile)	Access primary incumbent information for positions.
View Primary Incumbents (Search) Page	N/A	Search for a position to manage position incumbent data.
Manage Primary Incumbents Page	POSN_PRI_INCUMB_FL	Review position incumbent data and assign a primary incumbent for a position.
Primary Incumbent History Page	POSN_PRI_HIST_SCF	Review historical primary incumbents for a position.
Position Incumbents Page	POSN_INCUM_ALL_FL	View a list of incumbents associated with a position.

Manage Primary Incumbents Tile

Use the Manage Primary Incumbents tile to access primary incumbent information for positions.

Navigation:

From the "Workforce Administrator Homepage" (Application Fundamentals) in fluid, click the Position Management Tile to access the Position Management Dashboard.

The Manage Primary Incumbents tile is delivered as part of the Position Management dashboard by default, but the location may be different if you change the delivered home pages or if administrators personalize their home pages.

Note: To grant Manage Primary Incumbent functionality in fluid to users, you must assign the *Primary Incumbent Admin* role to the administrator managing primary incumbents.

This example illustrates the Manage Primary Incumbents tile.
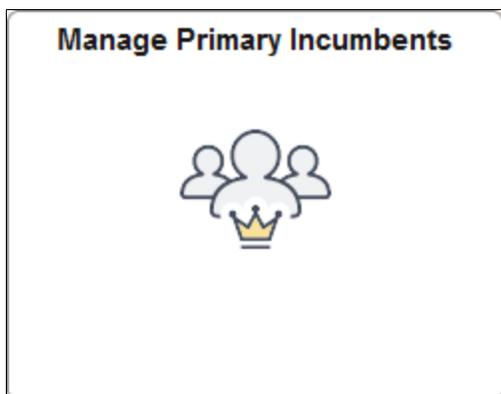
Click the tile to open the <u>View Primary Incumbents (Search) Page</u> and search for a position.

Important! You must have Manage Primary Incumbent enabled on the <u>Position Management Installation Page</u> to be able to access this tile and pages.

View Primary Incumbents (Search) Page

Use the View Primary Incumbents search page to search for a position for which you want to manage primary incumbent information.

Navigation:

• From the <u>Position Management Dashboard</u> click the <u>Manage Primary Incumbents Tile</u>.

• **Organizational Development** > **Position Management** > **Manage Primary Incumbents**

Note: To grant users Manage Primary Incumbent functionality in fluid, you must assign the *Primary Incumbent Admin* role to the administrator managing primary incumbents.

This example illustrates the fields and controls on the View Primary Incumbents (Search) page.
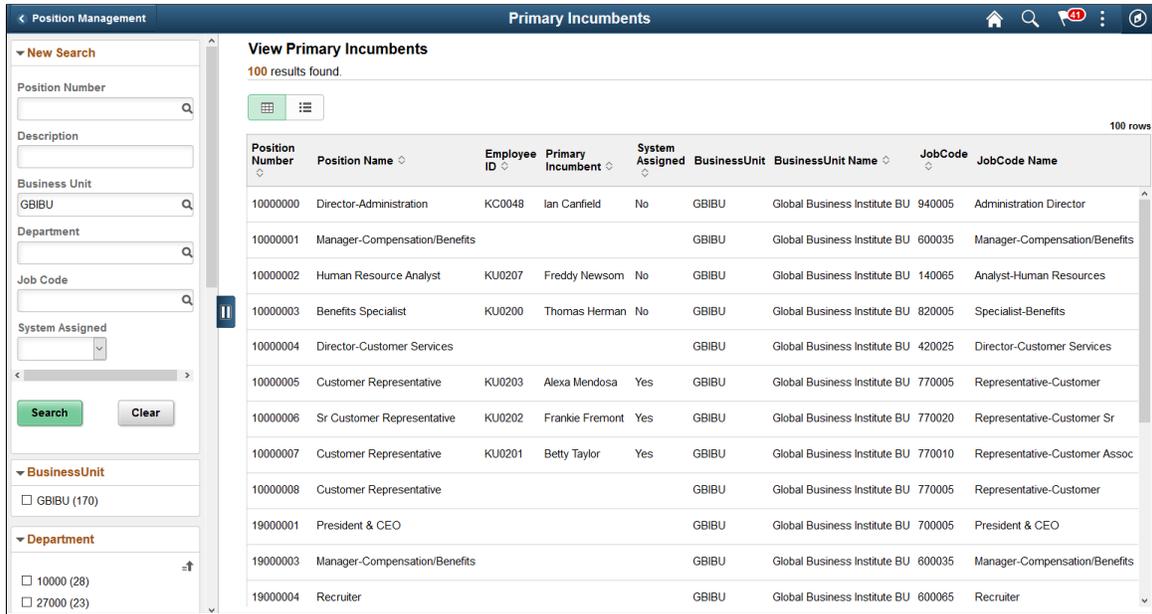
Important! After you first enable the Manage Primary Incumbent functionality, you will need to run the one-time *Sync Incumbents* (*POSN_PRI_SYNC*) process (**PeopleTools** > **Process Scheduler** > **Schedule Process Requests**) to have the system assign a primary incumbent for every position in the database.

Left Search/Facet Panel

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

Field or Control	Description

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**
	
	• **Business Unit**
	
	• **Department**
	
	• **Job Code**
	
	• **System Assigned**:
	
	    • *No* — Positions where you have manually assigned a primary incumbent.
	
	    • *Not Applicable* — Positions that have not been assigned a primary incumbent.
	
	    • *Yes* — Positions where the system assigned a primary incumbent.
	
	Enter the search criteria and click Search. Partial word searches are not valid.
	
	After you enter the initial search criteria, the main panel will display the results, and the search/facet panel will display addition facets that correspond to the positions listed in the search results.

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

View Primary Incumbents Panel

Search results appear in the main panel of the page. Use this section to view valid positions from your search results.

Field or Control	Description
(Grid view) or (List view)	Click either the Grid icon or List icon to display data represented by the icon type. Grid view is the default display.

Field or Control	Description
Position Number and **Position Name**	Displays the position number and name of those positions that meet the search criteria.
Employee ID and **Primary Incumbent**	Displays the ID and name of the employee who has been assigned as the primary incumbent for this position. When there is no current primary incumbent, these fields will be blank.
System Assigned	Displays the following values: • *Yes*: Indicates that system automatically assigned this incumbent to this position. • *No*; Indicates that you manually assigned this incumbent to this position. • <Blank>: Indicates that there are no current incumbents assigned to this position.

The remaining columns on this page help identify the job of this position.

Select a row to access the Manage Primary Incumbents Page and view or edit incumbent data and assigned primary incumbent details.

Related Links

Creating Positions Using Fluid
Manage/Create Position - Budget Incumbents Page

Manage Primary Incumbents Page

Use the Manage Primary Incumbents page (POSN_PRI_INCUMB_FL) to review position incumbent data and assign a primary incumbent for a position.

Navigation:

• Select the Manage Primary Incumbents Tile from the Position Management Dashboard.

• **Organizational Development** > **Position Management** > **Manage Primary Incumbents**.

Then select a position from the View Primary Incumbents (Search) Page search results.

This example illustrates the fields and controls on the Manage Primary Incumbents page.

Important! After you first enable the Manage Primary Incumbent functionality, you will need to run the one-time *Sync Incumbents* (*POSN_PRI_SYNC*) process to have the system assign a primary incumbent for every position in the database.

Note: The system will not submit an approval request when a primary incumbent is not defined.

This page shows a list of incumbents assigned to this position, sorted first by primary incumbent and then by those identified as future primary incumbents. If no current incumbents exist for this position, the list will display the message that there are no current incumbents.

Field or Control	Description
Include Future Incumbents	Swipe to *Yes* to have the list display any employees that have been assigned to this position with a future effective date. • If no future incumbents exist, the system will issue a message that there are no future incumbents for this position. • If future incumbents exist, they will appear in the list with an **Incumbent Status** of *Future*. Swipe to *No* to show only those employees who are current incumbents of this position.
View Incumbent History link	Click this link to access the Primary Incumbent History Page and view previous primary incumbents for this position. If no previous primary incumbents exist, a message will display indicating that there is no primary incumbent history to view.

Field or Control	Description
(Primary Incumbent icon)	This crown icon indicates who is the current primary incumbent for this position. **Note:** There can be only one primary incumbent at a time. Use the **Start Date** on this page to indicate when a person should assume the role of the primary incumbent. The person with the most current start date is considered the primary incumbent. If the current primary incumbent leaves the position, the system will use the selection method defined on the Position Management Installation Page to auto assign the next primary incumbent. When a primary incumbent leaves the position, the system will send a push notification to the position administrator to review this page and make changes if necessary.
Name / ID - Record	Displays the name, ID, and employment record number of the incumbents for this position. The primary incumbent will also appear at the top of the list. Any other incumbents that are marked as a primary incumbent for a future date will appear under the current primary incumbent.
Incumbent Status	Indicates if this is a current or future incumbent of this position. **Note:** Run the *Nightly Refresh Primary Incumb* (*POSN_PRI_AE*) process (**PeopleTools** > **Process Scheduler** > **Schedule Process Requests**) manually or on a regularly scheduled basis to ensure all future dated rows that have become current are updated.
Position Date Range	Shows when the person entered this position. If a person was previously in this position and has since returned to this position, the date fields will show the initial date range (start and end dates) this person was in this position. It does not show the date he or she reentered this position.
Primary Incumbent	Swipe the **Primary Incumbent** field to *Yes* to indicate that this person should be defined as either the current or future incumbent. When you select *Yes*, you are required to enter the start date that this person became or will become the primary incumbent. **Note:** Only one current primary incumbent is allowed at a time, but you can indicate several individuals for a future date.

Field or Control	Description
Start Date	Enter the date the person became or will become the primary incumbent. You cannot enter a date that precedes the date of the current primary incumbent or the date that this person enters the position. When primary incumbents are identified, the page will sort the incumbents first by the **Start Date** value. **Note:** Only one primary incumbent is allowed at a time, but you can indicate several individuals for the future role of primary incumbent. When the start date for a person becomes current, he or she will be assigned as the primary incumbent, and the previous primary incumbent will return to the incumbent list. To see the history of who has held the position of primary incumbent, select the View Incumbent History link at the top of the page.

System Assigned	Displays how the person was assigned as a primary incumbent. Valid values are:
	
	• *Yes*: Indicates that system automatically assigned this incumbent to this position.
	
	Auto assignments may occur under the following conditions:
	
	  • You ran the *Sync Incumbents (POSN_PRI_SYC)* process to have the system assign a primary incumbent to positions that have incumbents but no primary assigned.
	
	  • The current primary incumbent has moved out of this position and this person was the next in line based on the auto assign logic defined on the <u>Position Management Installation Page</u>.
	
	  • You assign a person to a position that does not currently have a primary incumbent. This person will become the primary incumbent, even if another incumbent already exists.
	
	• *No*; Indicates that you manually assigned this incumbent to this position.
	
	If a person has been marked as a future primary incumbent and the nightly build identifies the **Start Date** value as current, the system will assigned a value of *No*, since you manually identifies this person as a primary incumbent.
	
	• *N/A*: Indicates that this person has not been assigned as a current or future primary incumbent for this position.

Field or Control	Description
View Job Data	Click this link to open a new browser window and view the person's Job Data.
	When Fluid Job Data is not enabled, the system will direct the user to the classic Job Data pages (see the "(Classic) Adding Organizational Instances" (PeopleSoft Human Resources Administer Workforce) documentation for viewing job data).
	When Fluid Job Data is enabled on the "Person and Job Installation - Job Data Page" (PeopleSoft Human Resources Administer Workforce), the system will open the "Job Actions Summary Page" (PeopleSoft Human Resources Administer Workforce) in fluid, based on the access of the user.
	To return to the Manage Primary Incumbents page, select the appropriate browser window.
Save	Click to save any changes you made to this page. You must select at least one primary incumbent to save the page. This can be future dated. Note that future dated primary incumbents will not appear in the Primary Incumbent field on the View Primary Incumbents (Search) Page.
	The HR and position primary incumbent administrators will be notified of any changes to this page.

Understanding How Job Data Changes Affect the Primary Incumbent Status

Although the primary incumbent administrator will manually maintain the primary incumbent information for a position using the Manage Primary Incumbents Page, updates to a person's job data may also impact the status of the primary incumbent. The Primary Incumbent functionality will make changes to the primary incumbent when theses Job Data events occur:

- An employee moves into a position as a result of hire, transfer-in, or position change.

- An employee moves out of a position as a result of transfer or position change.

- An employee's HR or Payroll Status changes.

When the HR administrator makes Job Data changes and saves the page, the system issues the following types of warning messages on the Job Data pages, informing the user that this update will impact the primary incumbent of the position:

- Assigning a primary incumbent to position

- Removing a primary incumbent from a position

When the message is accepted, the system will assign or remove an employee as the primary incumbent for a position and the Manage Primary Incumbents Page will reflect the change. In cases where an employee is removed from the position due to a job change or change in **Payroll Status** value, the primary incumbent will be reset and the next primary incumbent will be assigned according to the selection method defined on the Position Management Installation Page.

Note: The system also sends a push notification to the primary incumbent administrator to notify him or her of the change and to review the Manage Primary Incumbents Page for the position.

Important! You should also schedule to run the *Nightly Refresh Primary Incumb (POSN_PRI_AE)* Application Engine process (**PeopleTools** > **Process Scheduler** > **Schedule Process Requests**) on a nightly basis to identify future incumbents and have the system mark them as the primary incumbent, if applicable. Be aware that when the nightly build process results in changes to the Manage Primary Incumbent table, the system does not issue a warning or send a push notification to the primary incumbent administrator.

The following are some scenarios that demonstrate what happens to the primary incumbent status when changes are made to the employee's job data. Other scenarios may apply to your situation.

—Scenario 1: Employee Assigned to a Position—

Job data Actions that may result in an employee getting assigned to a position may include a Transfer, Promotion, Location Change, Department Change, and so forth.

This example demonstrates what happens to the primary incumbent flow when an employee is assigned to a position.
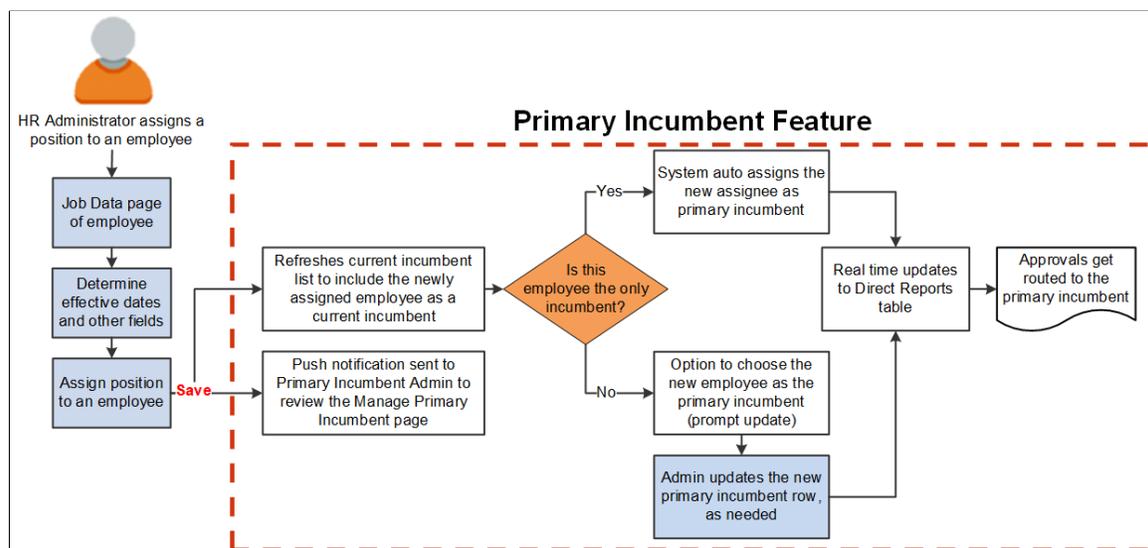
When an HR administrator updates an employee's Job Data, which assigns an employee to a position, the system performs the following steps:

1. Sends the primary incumbent administrator a push notification informing him or her to review the Manage Primary Incumbents Page.

2. Updates the incumbent list for the position to include the employee that was just assigned to the position.

3. Checks to see if the position to which the employee was just assigned has any incumbents.

   • If this employee is the only incumbent, the system automatically assigns this person as the primary incumbent.

- If this employee is not the only incumbent, the primary incumbent administrator can review and update the Manage Primary Incumbent page as needed.

4. The Direct Reports table is updated to reflect the new primary incumbent, if any. Any new approval requests will be sent to the current primary incumbent.

—Scenario 2: Employee Moves Out of a Position—

Job data Actions and reasons that may result in an employee moving out of a position may include a Transfer, Promotion, Location Change, Department Change, Death, Retirement with Pay, Retirement, Termination, Terminated with Pay, Retirement-Pension Administration, and so forth.

This example demonstrates what happens to the primary incumbent flow when an employee moves out of a position.

When an HR administrator updates an employee's Job Data, which removes the employee from a position, the system performs the following steps:

1. Sends the primary incumbent administrator a push notification informing him or her to review the Manage Primary Incumbents Page.

2. Updates the incumbent list for the position to exclude the employee that was just removed from the position.

3. Checks to see if the employee being removed from the incumbent list is the primary incumbent.

- If this employee is not the primary incumbent, nothing needs to happen.

- If this employee is the primary incumbent, the system determines how many employees are in the position prior to this employee's removal.

  – If there is more than one incumbent, the system uses the auto assignment selection method, as defined on the Position Management Installation Page, to assign the next primary incumbent. The primary incumbent administrator can review and update the Manage Primary Incumbent page as needed.

  – If there is only the one incumbent, the system will mark this position as a vacant position and no primary incumbent is assigned. The primary incumbent administrator can view the Primary Incumbent History Page to see that the employee that left the position has been moved to history.

4. The Direct Reports table is updated to reflect the new primary incumbent information. Any new approval requests will be sent to the new primary incumbent, if any.

—Scenario 3: Employee is Associated with a Position but Temporarily Not Working—

Job data Actions and reasons that may result in an employee temporarily not working may include a Leave of Absence, Leave with Pay, Suspension, Short Work Break, and so forth.

This example demonstrates what happens to the primary incumbent flow when an employee is in a position but temporarily is not working.
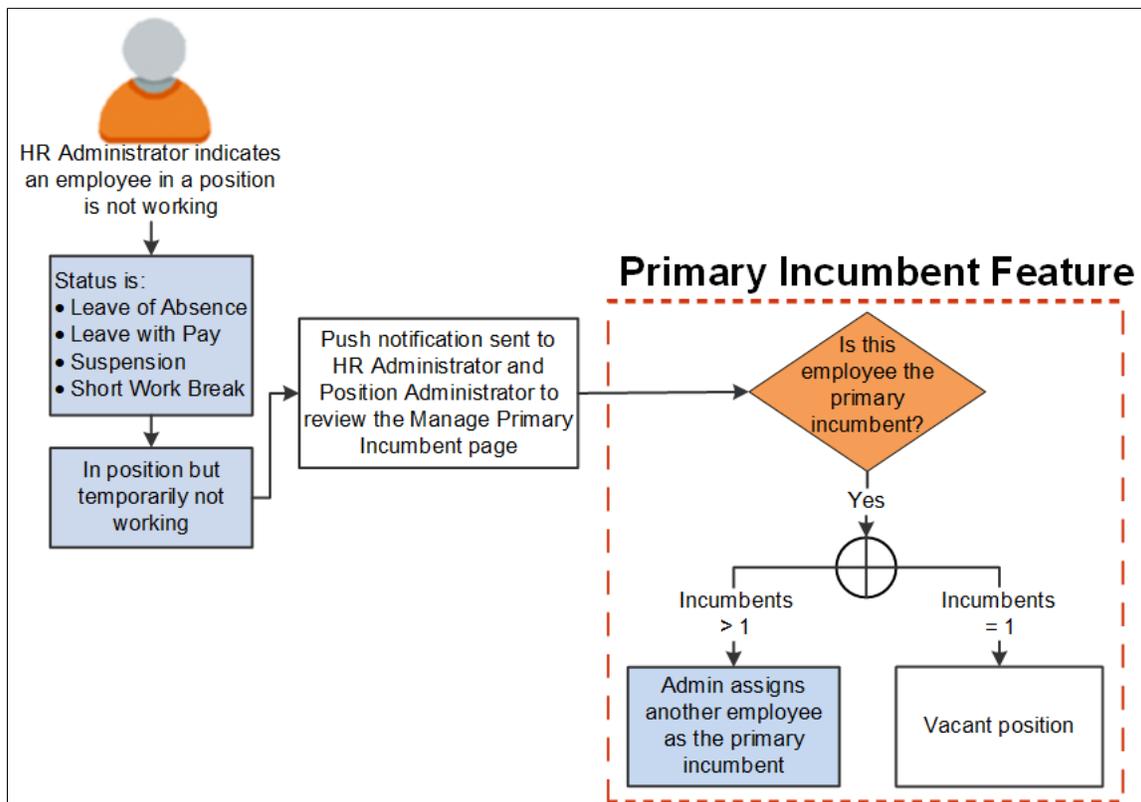
When an HR administrator updates an employee's Job Data in such a way that the employee is still in a position but is temporarily not working (i.e.- Leave of Absence, Leave with Pay, Suspension, or Short Work Break), the system performs the following steps:

1. Sends the primary incumbent administrator a push notification informing them to review the <u>Manage Primary Incumbents Page</u>.
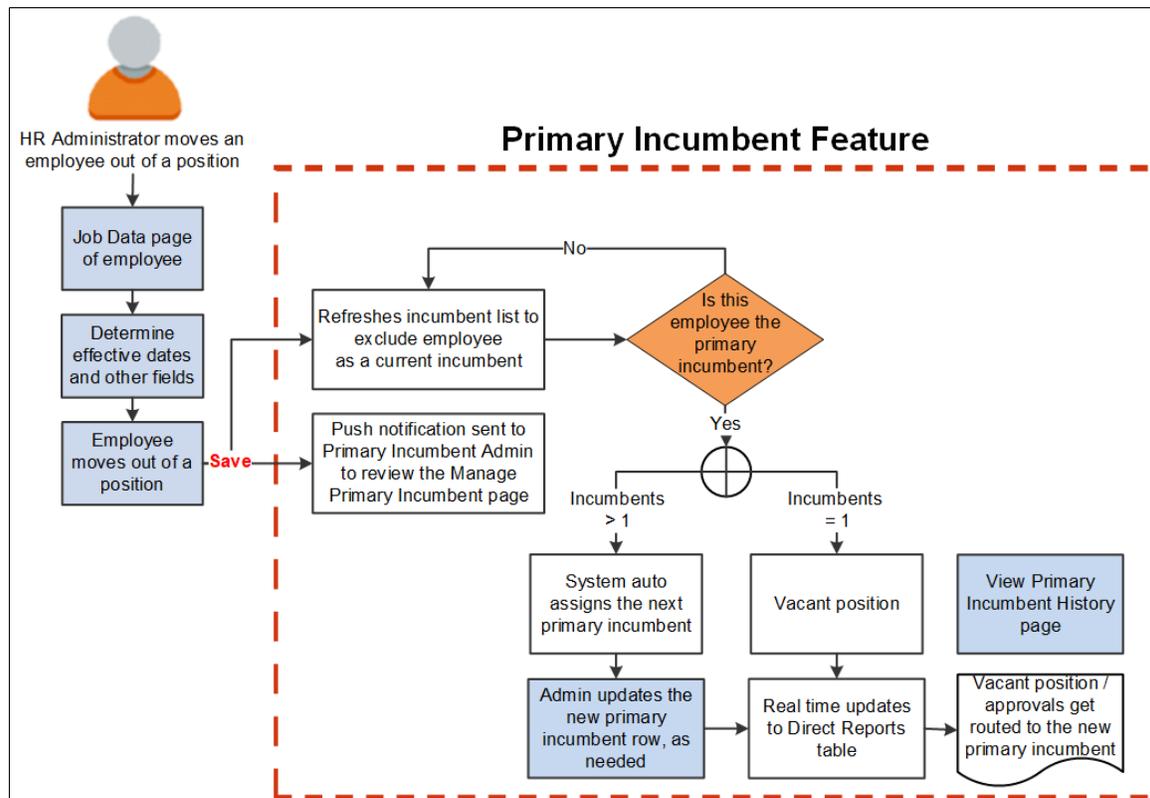
2. Checks to see if the employee is the primary incumbent.

    *   If this employee is not the primary incumbent, nothing needs to happen.

    *   If this employee is the primary incumbent, the system determines how many employees are in the position.

        – If there is more than one incumbent, the primary incumbent administrator should review and update the Manage Primary Incumbent page to assign a new primary incumbent.

        – If there is only the one incumbent, the system will mark this position as a vacant position and no primary incumbent is assigned.

Running the Nightly Refresh Primary Incumbent (POSN_PRI_AE) Process

You will need to run the *Nightly Refresh Primary Incumb* (*POSN_PRI_AE*) process (**PeopleTools** > **Process Scheduler** > **Schedule Process Requests**) on a regularly scheduled basis, or manually as needed, to maintain the current primary and incumbent information.

The *POSN_PRI_AE* process performs the following:

*   Identifies the new primary incumbents when the **Start Date** has become current.

*   Updates historical primary incumbent information for those who have moved out of the primary incumbent position.

*   Changes future incumbent's statuses to *Current* when they have reached the **Position Date Range** start date.

*   Manages job data changes that result in an employee moving out a of position or getting assigned to a position.

Primary Incumbent History Page

Use the Primary Incumbent History page (POSN_PRI_INCUMB_FL) to review historical primary incumbents for a position.

Navigation:

Click the Review Incumbent History link on the <u>Manage Primary Incumbents Page</u>.

This example illustrates the fields and controls on the Primary Incumbent History page.

View the date range that a person served as the primary incumbent. Only those individuals that have been identified as a primary incumbent will appear on this page.

Field or Control	Description
Position Date Range	Displays the date range the person was in this position. **Note:** When a primary incumbent's Job Data row is deleted using Correct History mode, the **Position Date Range** field will be blank. Since the employee was once associated to this position, this page maintains the history of all primary incumbents (even those with deleted rows) but displays the date range as blank.
Primary Incumbent Start Date and **Primary Incumbent End Date**	Indicates the beginning and end date of when this person served as the primary incumbent.

Position Incumbents Page

Use the Position Incumbents page (POSN_INCUM_ALL_FL) to view a list of incumbents associated with a position.

Navigation:

Select one of the following links for a position within the **Position Details** grid of the Position Management Insights Dashboard.

• **Incumbents List** link

• **"Reports To" Incumbents List** link

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

Position Incumbents

Position Number	QDP00007
Description	Associate 7
Current Head Count	2 of 3

Current Incumbents   2 rows

Name ↑↓	Empl ID ↑↓	Empl Record ↑↓	Full/Part ↑↓	Stnd Hrs/Wk ↑↓	Effective Date ↑↓	Action ↑↓	Action Reason ↑↓	Override Position Data ↑↓
Alida van der Ence	QDE07	0	Full-Time	42.00	01/01/2010	Position Change	Transfer	N
George Encyclopedia	QDE16	0	Full-Time	42.00	01/01/2010	Position Change	Transfer	N

Using Fluid Approvals to Approve Position Data

This topic provides and overview of granting edit abilities to an approver and 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 (this includes the cloning of a position).

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

Note: Position administrators use the AWE framework and the Position Management Installation Page to specify which of these position transaction types require approvals.

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

The following videos provide an overview of Fluid Position Management:

Video: PeopleSoft Fluid Position Management (Approvals)

Video: 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

Understanding How to Grant Edit Abilities to an Approver

The PeopleSoft Manage Positions business delivers the *Position Edit Administrator* role, which enables you to provide your approvers the ability to make edits to a new or updated position request. When this role is assigned to a user's profile (**PeopleTools** > **Security** > **User Profiles** > **User Profiles** > **Roles**) the **Edits Details** link will appear on the Pending Approvals page for a position request.

Multiple Approvers

When a position approval request has more than one person in the approval chain, the **Edits Details** link will be available only for the final approver in the chain, provided that person has been given the *Position Edit Administrator* role.

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.

This example illustrates the fields and controls on the Pending Approvals - Create Position page. In this particular example, the approver has been assigned the *Position Edit Administrator* role so the Edit Details link is available.

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" (Application Fundamentals).

Field or Control	Description
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 proposed changes requested for the position. For updates to existing positions, the group box will show the proposed and current values.

Additional Details Section

Field or Control	Description
View Position Details	Click this link to access the View Position Page where you can review details about the position. <hr> **Note:** The approver must have access to the Position View page to review this information.
Edit Details	Click this link to access the fluid Manage Position component (Manage/Create Position - Position Data Page) where you can make updates to the position and submit the request. You will be returned to the approval pages where you will see your changes. You will need to approve the request for these changes to take place. <hr> **Note:** The approver must be assigned the *Position Edit Administrator* role to see the link and be given access to the Manage Position pages in fluid to make the edits.

Attachment Details Section

Field or Control	Description
Attachments	Click this item to open the Attachments Page, where you can review the attachment associated with this position.

Approver Comments and Approval Chain Sections

Field or Control	Description
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.

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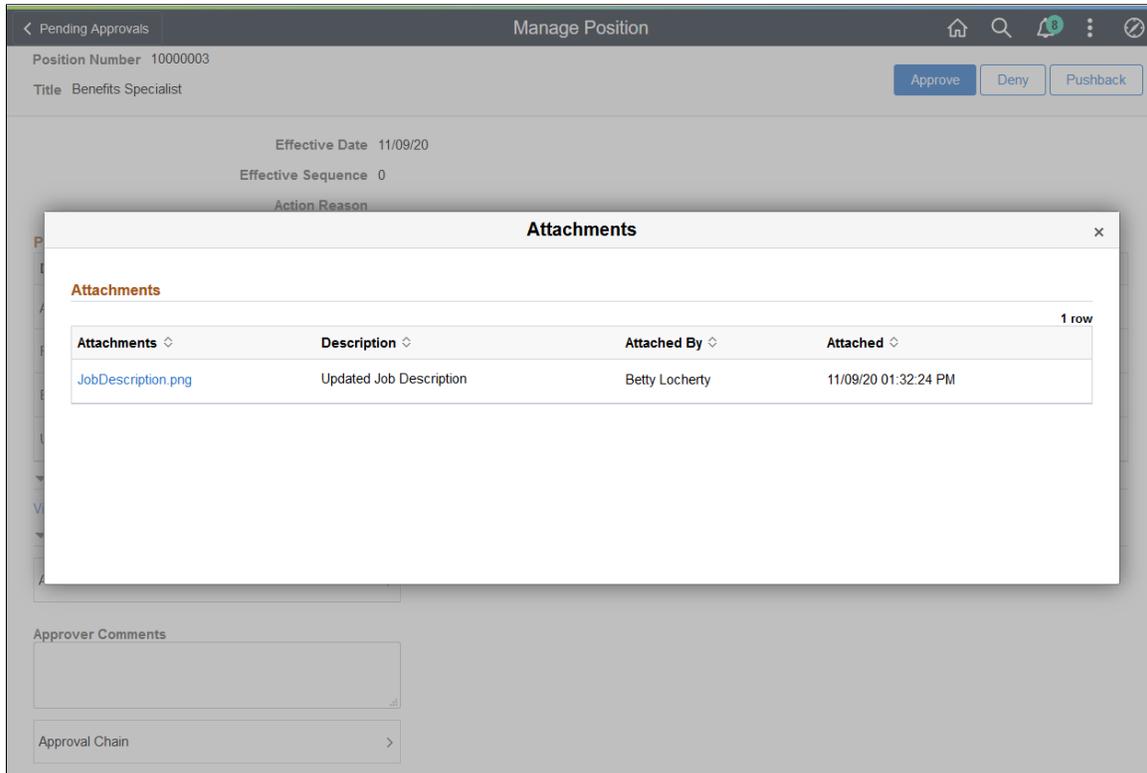
Click the Attachments link to download and view an attachment using fluid. Note that attachments are not accessible from the classic pages.

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

Video: PeopleSoft Fluid HCM Attachments

Viewing Position Management Insights

Administrators can use the Position Management Insights dashboard to evaluate position data. This dashboard allows administrators to visualize open positions, open headcount data, position requests awaiting approval and rework, and take action from the position details based on the logged in user's security access.

The PeopleSoft Position Management Insights dashboard is built on the PeopleSoft Insights platform, which relies on an underlying analytics engine and search engine. This dashboard is built on position data and uses search index *HC_POSITION_DATA_INDEX*. The index uses real-time updates to the indexed data and is designed to fetch Position Data for positions in *Approved*, *Pending Approval*, and *Rework* workflow statuses.

This topic provides an overview of how to set up the Insights dashboard for Position Management Insights analytics, lists common elements and controls, and discusses the PeopleSoft Insights Position Management Insights dashboard.

Understanding PeopleSoft Insights

PeopleSoft Insights is an analytical engine that provides visual reports (visualizations) in the form of charts, tables, graphs and so on. The visualizations are based on queries that retrieve data from the PeopleSoft Search Framework.

These videos provide an overview of the Insights feature:

Video: Insights with PeopleSoft

Video: PeopleSoft HCM Insights

For information on Insights dashboards, see:

• "Understanding PeopleSoft Insights" (Application Fundamentals)

• *PeopleTools Search Technology:* "Monitoring PeopleSoft Search Framework and OpenSearch" and "Working with Insights Dashboards for PeopleSoft Application Data" documentation.

Pages Used to View Position Management Insights

Page Name	Definition Name	Usage
Position Management Insights Tile	HC_POSITION_DATA_INSIGHTS_FL (this is the cref for this tile)	Access and view position management analytics.
Position Management Insights Dashboard	KIBANA_COMP (this is the cref for the dashboard)	Review and analyze position data using visualizations.

Understanding How to Set Up the Insights Dashboard for Position Management Analytics

Before administrators can access the visualizations for position management data, perform the following steps:

1. Deploy the *HC_POSITION_DATA_INDEX* (Position Data Index) index.

   (**PeopleTools** > **Search Framework** > **Search Admin Activity Guide** > **Administration** > **Deploy/Delete Object**)

2. Build the *HC_POSITION_DATA_INDEX* search definition.

   (**PeopleTools** > **Search Framework** > **Search Admin Activity Guide** > **Administration** > **Schedule Search Index**)

3. Deploy the *Position Management Insights Tile* and *Position Management Insights* dashboard.

   (**PeopleTools** > **Search Framework** > **Administration** > **Deploy Insights Dashboards**)

   Note: The full index must be run before the dashboard can be deployed

4. Assign the *HR Administrator* role to users that should be granted access the Position Data Insights dashboard.

Note: It is recommended that the Position Management Insights dashboard be applied on a database with PeopleTools 8.59.21 / 8.60.07 or higher.

Real Time Indexes for Position Management Insights Visualizations

The Position Data Index (HC_POSITION_DATA_INDEX) search index supports real time indexing (RTI) with PeopleTools versions 8.59.22A, 8.60.10A, and 8.61 and higher. When enabled, RTI allows real-time updates to the indexed data to provide a search using the latest information.

For more information about Real Time Indexing, refer to *PeopleTools: Search Technology*, "Administering Real Time Indexing."

Related Links

"Understanding PeopleSoft Insights Using PeopleSoft Search Framework" (Application Fundamentals)
"Understanding Real Time Indexing in HCM" (Application Fundamentals)

Common Elements and Controls

This section lists the common elements and controls that are used in Insights analytics.

For more information on working with PeopleSoft Insights and filters, see *PeopleTools: Search Technology,* "Working with Insights Dashboards for PeopleSoft Application Data" documentation.

Search and Filter Options:

Note: Filtering options apply to all visualizations, which allows users to drill down on all the charts at once.

Enter criteria to filter data on the visualizations. You can apply filters in a number of ways:

- Enter queries in the Search field.

- Use the + **Add filter** link to create filters using fields, operators and field values.

- Use delivered filter fields.

- Select a chart item from a visualization.

- Use the filter options in the **Remote Worker Details** grid to add or exclude items.

- Use the legend to add or exclude items.

Field of Control	*Definition*
Search field	Enter a query to filter data, if applicable.

Field of Control	*Definition*
(Change all filters) and **+ Add filter** icon and link	Added filters are displayed next to the **+ Add filter** link for reference. When you select a chart item, the filter is automatically added to your filters list. When you select some items, the system will prompt you to add multiple filters, since some items consists of more than one filter. For example, the **Open vs partially filled position by Department** visualization bars use both the *Department* and *Open/Filled* filter information. Click the **Change all filters** icon for a list of actions that can be performed on *all* filters, for example, disable them temporarily, remove them permanently, or invert inclusion (show data that does not meet filter criteria). Click a filter item for a list of similar actions that can be performed on it individually.
(Calendar) or **Show dates** icon and link	Click to select a different time period for the analytics. You can enter it manually, or choose from commonly used date ranges provided the system as well as recently used selections. When a new period is selected, all visualizations are refreshed automatically to reflect that change. If you have selected a commonly used date range, for example, *This week*, or *Last 30 days*, click the **Show dates** link to view the approximate date period in relation to the current date. For example, the current date is on a Tuesday and the selected date range is *This week*. Clicking the **Show dates** link displays *~ 3 days ago —> ~ in 4 days*, because it's the third day of the week with four more to complete the week.
Business Unit, **Regulatory Region**, **Department**, **Locations**, **Jobcode**, **Position Title**, **Reports To**, **Remote Worker Eligibility**, **Approval Status**, and **Position Filled Status** fields	Select to filter position data by business unit, followed by regulatory region, then by department, and so on. ─────────────────────────── **Note:** Additional filters are available in the index, even though they are not delivered to automatically show on this page. These include **Salary Plan**, **Grade**, **Job Function**, **Job Sub-function**, **Job Family**, and (USA only)**EEO Category**. ───────────────────────────

Field of Control	Definition
Apply changes button, **Chancel Changes** link, and **Clear form** link	These buttons are available after you select filers. Select the **Apply changes** button after you select filters to update all visualizations. Select the **Chancel Changes** link to remove any update you entered since the last time you applied changes. Select the **Clear form** link to remove all the values from the fields in this section. You must select the **Apply changes** button to update the visualizations.

Visualization Options:

When you pause over a visualization, the visualization displays the **Options** and **Legend** icons (if applicable) in the top right and bottom left corners respectively. Use them to inspect the chart or table and view the details of that visualization and toggle the legend display.

Field or Control	Definition
(Options) icon	Click the Options icon to select one of these options: • *Inspect*: Select this option to have a slide out page appear providing the details in a grid format. You can also download data from this page. • *Maximize panel* or *Minimize*: Select *Maximize panel* to have the page display this visualization in full screen. Select *Minimize* to return to the dashboard and display all visualizations.
(Toggle legend) icon	Click this icon to hide or display the legend for the chart, if available. You can click an item in the legend to change its color, or add it as a filter (if applicable).
Chart item (bar, pie slice, and so forth)	Pause over a chart item, such as a bar item or pie slice, to view a summary of details for that item. Select a chart item to add a filter for it to apply to all visualizations.

Position Management Insights Tile

Use the Position Management Insights tile to access and view position management analytics.

Note: The tile shows position data relevant to the logged in user's security access.

Navigation:

Workforce Administrator home page > **Position Management tile** > **Position Management Insights tile**

This example illustrates the fields and controls on the Position Management Insights tile.
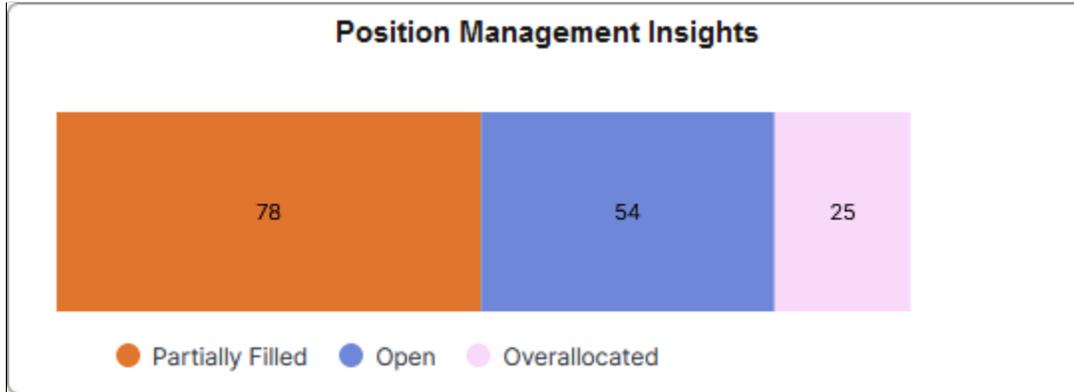
The Position Management Insights tile displays a horizontal bar graph for approved positions with a *Partially Filled*, *Open*, and *Overallocated* status. *Filled* positions are excluded.

The tile and dashboard show position data relevant to the logged in user's security access.

Select this tile to access the Position Management Insights Dashboard and analyze visualizations related to position data for the organization.

Position Management Insights Dashboard

Use the Position Management Insights dashboard to review and analyze position data using visualizations.

Note: The dashboard shows position data relevant to the logged in user's security access.

Navigation:

Workforce Administrator home page > **Position Management tile** > **Position Management Insights tile** > **Position Management Insights dashboard**

Note: You must be assigned the *HR Administrator* role to view this dashboard.

This example illustrates the fields and controls on the Position Management Insights dashboard (1 of 7).

This example illustrates the fields and controls on the Position Management Insights dashboard (2 of 7).

This example illustrates the fields and controls on the Position Management Insights dashboard (3 of 7).

This example illustrates the fields and controls on the Position Management Insights dashboard (4 of 7).

This example illustrates the fields and controls on the Position Management Insights dashboard (5 of 7).
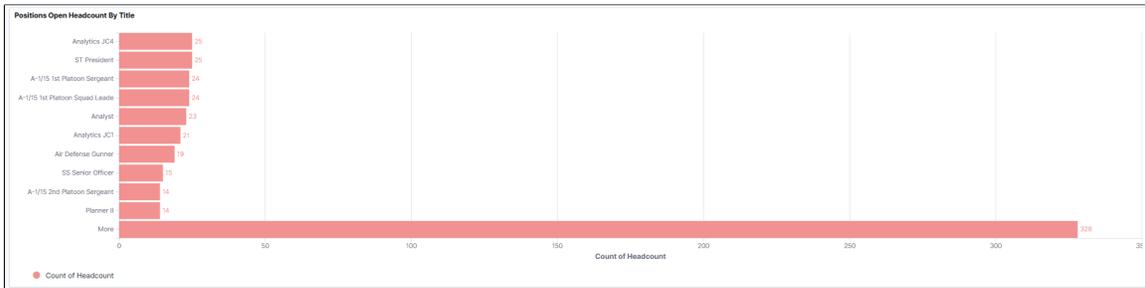
This example illustrates the fields and controls on the Position Management Insights dashboard (6 of 7).

This example illustrates the fields and controls on the Position Management Insights dashboard (7 of 7).

Warning! PeopleSoft Insights dashboards may not render properly if you access them using unsupported platforms.

The Position Management Insights dashboard provides you with different visualizations to analyze position data. When you select filters or chart items, Insights dynamically updates all visualizations using the sources from the index.

Each visualization enables you to inspect the chart or table to view the details of that visualization. Pause over a visualization to have the have additional page elements appear, view numbers, or click items to add filters to your visualizations.

For a list of pre-delivered filters that are available at the top of the dashboard, see the <u>Common Elements and Controls</u> section in this topic.

For more information on working with PeopleSoft Insights and filters, see *PeopleTools: Search Technology,* "Working with Insights Dashboards for PeopleSoft Application Data" documentation.

Position Metrics

Use this section to view Position Management visualizations for position metrics.

Visualization	Description
Total Positions number count	This panel displays the number counts of all approved (not pending or pushed back) positions.
<Type> - Position number counts • **Open** • **Partially Filled** • **Filled** • **Overallocated**	This panel displays the number counts for positions that have not been filled, those that have filled part of the headcount allotment, those that are filled, and those that are over headcount for the position. Select individual counts to drilldown to those position details.
Eligible for Remote Work number count	This panel displays the number counts of positions that allows remote work.
Full-Time vs Part-Time Positions	This panel displays the number and percentage of approved (not pending or pushed back) positions that are full-time and part-time.
Regular vs Temporary Position	This panel displays the number and percentage of approved (not pending or pushed back) positions that are regular and temporary.

Visualization	*Description*
Position Filled Statuses	This doughnut chart visualization displays the percentage of approved (not pending or pushed back) positions that are vacant, partially filled, filled, and positions that are over headcount.
Open vs partially filled position by Department	This horizontal bar graph visualization displays the top ten departments with open positions that have been approved (not pending or pushed back). Each department lists the number of open and partially filled positions. Select the **More** bar item to see the next 10 departments with vacancies.
Position Without Manager	This doughnut chart visualization displays active positions (not pending or pushed back) that depict two aspects where you may need to review the manager of a position. These include: • When a manager position has been assigned to a position but the manager position is vacant. • When a position doesn't have a manager position assigned to it.

Position Headcount Metrics

Use this section to view position headcount-related visualizations for active positions.

Visualization	*Description*
Positions Total Head Count number count	This visualization displays the full headcount allocated for all active positions.
Positions Open Head Count number count	This visualization displays a count of positions that have open or partially filled headcounts. Select the number count to dynamically update the dashboard to show those open positions.
Positions Open Headcount by Department	This horizontal bar graph visualization displays the top 10 departments and the number of open headcount positions. This applies to approved positions (not pending or pushed back). Select the **More** bar item to see the next 10 departments with vacancies.

Visualization	Description
Positions Open Headcount by Title	This horizontal bar graph visualization displays the top 10 job titles and its number of open headcount positions. This applies to approved positions (not pending or pushed back). Select the **More** bar item to see the next 10 job titles with open headcount.

Approval Status of Position Requests

Use this section to view Position Management visualizations for position request approval statuses.

Visualization	Description
Days Approval In Progress	This visualization enables you to specify a range of days to determine if there are any position requests that fall outside an acceptable days awaiting approval range. For example, if you enter 10 as the minimum number and 30 as the maximum, the **Pending Approvals Status** chart will display the percentage of pending and pushed back requests that were sent more than 10 days ago, but not more than 30 days ago. Enter numbers, use the up of down buttons, or move the slider bar to indicated a minimum and maximum number of days. Select the **Apply changes** button to update the **Pending Approvals Status** chart.
Pending Approval Status	This pie chart visualization displays the percentage of position requests pending approval or pushed back for rework. This is chart is based on the **Days Approval In Progress** range.

Position Details

Use this section to view a detailed list of positions that meet the visualization specifications and filters.

Field or Control	Description
⬍ (Sort column heading) icon	Select a column heading to sort grid rows by the column value in ascending or descending order.

Field or Control	Description
(Filter for value) and (Filter out value) icons	These filter icons appear when you pause next to a field value. These icons are available for all column values in the grid, and provide a quick way to add filters to the dashboard. Click the **Filter for value** (+ magnify glass) icon to add the shown field value as a filter. For example, if you click to filter for a **Department** value, all visualizations will refresh to show employee documents for that department. Click the **Filter out value** (- magnify glass) icon to remove the shown field value from the filtering process. For example, if you click to filter out the *Human Resources* value in the **Department** column, visualizations will refresh to show information for all departments except *Human Resources*. Filters can be removed from the Filters area at the top of the page.
Go To: Manage Position	Select this link to access the <u>Position Details Page</u> in a new browser window or tab. This allows you to review or edit the position details, based on your security access.
Go To: Incumbents List	Select this link to access the <u>Position Incumbents Page</u> in a new browser window or tab. This allows you to view a list of all incumbents associated with a position.
Go To: "Reports To" Incumbents List	Select this link to access the <u>Position Incumbents Page</u> in a new browser window or tab. This allows you to view a list of all manager incumbents in the **Reports To** field associated with the position.
Export links: • **Raw** • **Formatted**	Click to export data from the grid into a .csv file format.

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" (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

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.

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

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.

Field or Control	*Description*
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 Report 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)
Position 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

Field or Control	*Description*
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.

Field or Control	Description
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 Set Up HCM, Common Definitions, Configurable Matrices, Define Configurable 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** > **Position Budget Update** > **Position Budget Update**

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

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

Budget Periods

Field or Control	Description
Budget End Date	Enter the date the budget ends.
Budget Level	Displays the budget level that you specified on the Department Table.

Field or Control	Description
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

Field or Control	Description
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.

Field or Control	Description
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 Position Budget Update 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.

Field or Control	Description
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.

Field or Control	Description
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" (Application Fundamentals)

"Understanding Fiscal Year Budgets in PeopleSoft Human Resources" (PeopleSoft 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.

Page Name	Definition Name	Usage
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 > Position Budget Status > Position Budget Status

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

Position Budget Status

Position Number	19000030	Systems Analyst		☑ Budgeted
Position Status	Active	Approved	Status Date	01/01/1980
Business Unit	GBIBU	Global Business Institute BU		
Job Code	140080	Systems Analyst		
Department	11000	Information Systems		

Current Budget

Max Head Count	5	Actual Head Count	4	
Total Budget FTE	4.00	Total Budget Amount	276,006.400000	USD
Current Budget Head Count	0			
Current Budget FTE		Current Budget Amount		
Head Count Variance	4			
FTE Variance	4.00	Amount Variance	276,006.40	

▼ Current Incumbents   🔍 | ◀◀ ◀ | 1 of 4 | ▶ ▶▶ | View All

Name	Alain Gasse	Empl ID	KU0081	
Position Entry Date	07/27/1995	Payroll Status	Active	
Annual Rate	48,006.40	USD	Components	
Full/Part Time	Full-Time	Reg/Temp	Regular	
Standard Hours	40.00	FTE	1.000000	
Sal Plan	KU01	Grade	004	Step

Current Budget

Field or Control	Description
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 Position Budget Update page.
Current Budget FTE	Displays the current budgeted FTEs for this position. FTE budgets are defined on the Position Budget Update 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.

Field or Control	Description
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 Position Budget Status page.

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

Field or Control	Description
Compensation Rate	Displays the position incumbent's compensation rate.
Compensation Frequency	Displays the position incumbent's compensation frequency.

Amounts Tab

Select the Amounts tab.

Field or Control	Description
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.

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.

Field or Control	Description
Manually Updated	Indicates that the rate for this rate code was manually updated on the Job compensation record.

Field or Control	Description
Details	This link shows the rate code definition.

Changes Tab

Select the 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.

Field or Control	Description
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.

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.

Field or Control	Description
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.

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.

Field or Control	Description
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 Report - 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**

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.

Note: Select the tabs to view additional information.

Common Page Information

Field or Control	Description
Total Vacant Positions	Displays the total number of vacancies in the department.

Position Information Tab

Field or Control	*Description*
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 temporary)	Displays if the vacant position is *Regular* or *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" (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 and 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.
Position 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)

Page Name	Definition Name	Usage
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

Field or Control	Description
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 <u>Position Management Dashboard</u>, then click the <u>Administer Positions Tile</u>.

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

1-2 of 2

| 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

Field or Control	Description
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* for Yes or *N* for No.

Work Location Tab

Field or Control	Description
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

Field or Control	Description
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 Administer Positions 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.

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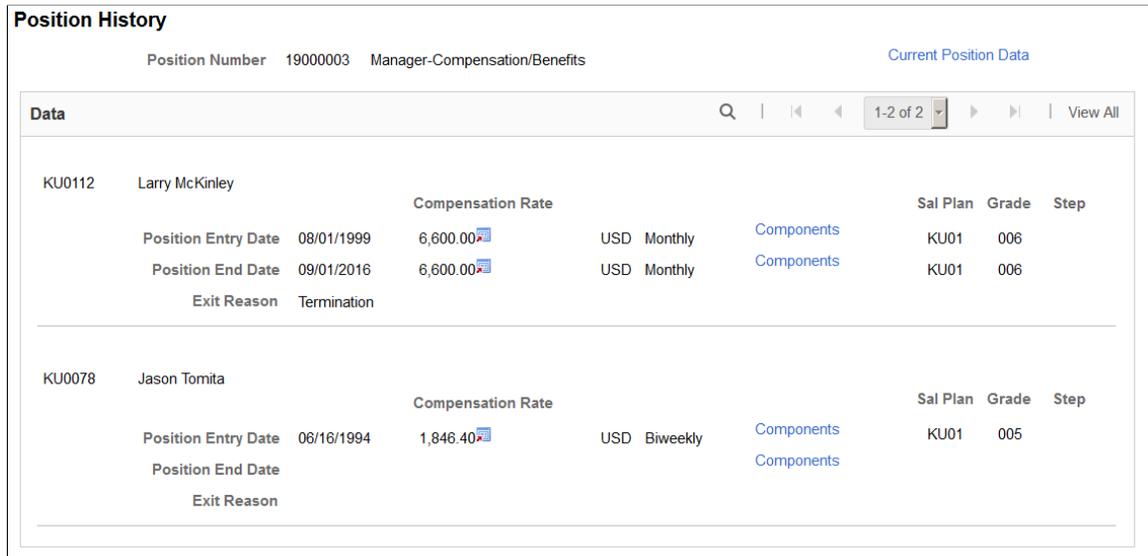
Displays incumbent salary information, which you can use for budgeting and to anticipate the approximate salary a new incumbent will receive. By examining the exit reasons, you can find ways to reduce incumbent turnover in a position.

Field or Control	Description
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 Position History - Salary Components Page. You can view the salary components information associated with the position at the incumbent's position begin and end dates. Click the **Components** link that is 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.

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.
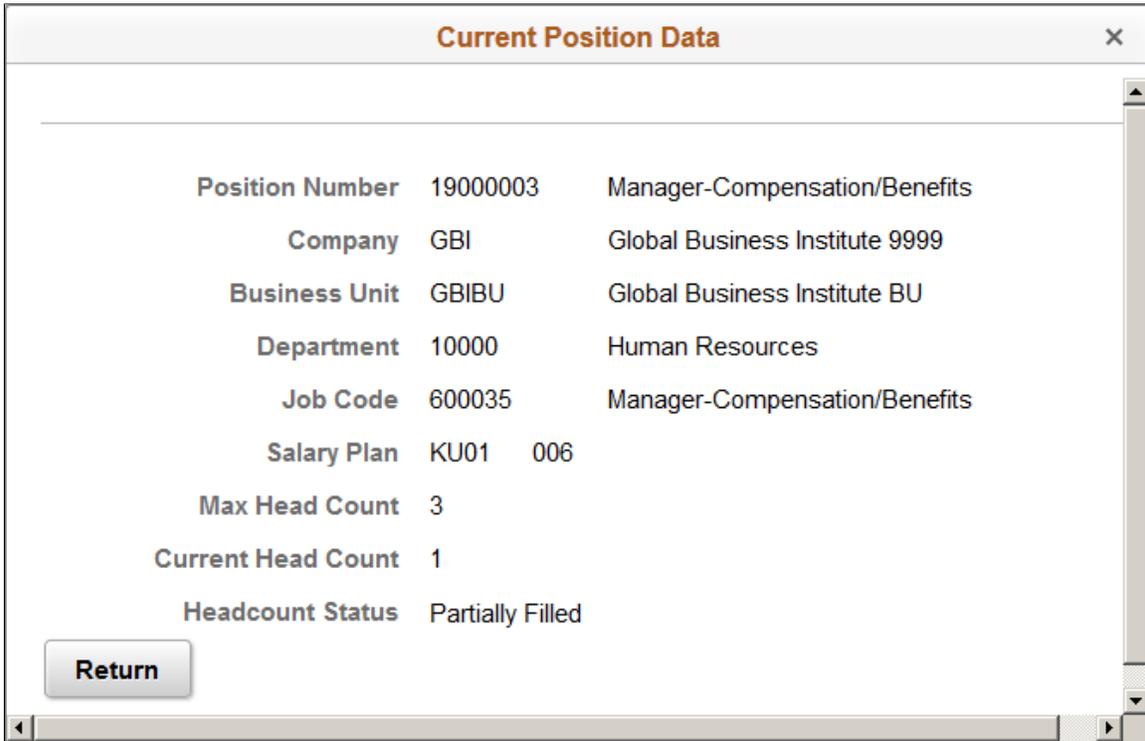
Field or Control	Description
Salary Plan	Displays the position's salary plan.
Current Head Count	Displays the current headcount assigned to this position.
Headcount Status	Displays the headcount status for this position.

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.

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

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

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.
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**

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.

Field or Control	Description
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.