



State of Oklahoma Project ENCORE

Exercise Guide: Human Capital Planning

Deloitte.

July 2014

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PSPB_Training

HCP

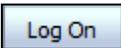
Position Budget Preparation

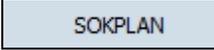
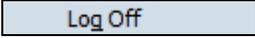
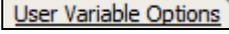
3.10 - Setting Preferences

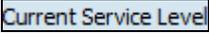
In this topic you will open the SOKPLAN application upon subsequent logons. User will also have the correct base dimensions set to Budget, Agency (Agency Request), FY16, and Current Service Level.

Procedure



Step	Action
1.	<p>To begin using the application, we must first Log On.</p> <p>The user name is not case-sensitive.</p> <p>Enter the desired information into the field. Enter "<User Name>".</p>
2.	<p>Enter the desired information into the field. Enter "<Password>".</p>
3.	<p>Click the Log On button.</p> 

Step	Action
4.	Click the File menu. 
5.	Click the Preferences... menu. 
6.	Click the Content list. 
7.	Click the Application list item.
8.	Click the Application: list. 
9.	Click the Planning list item.
10.	Click the SOKPLAN list item. 
11.	Click the OK button. 
12.	Click the File menu. 
13.	Click the Log Off menu. 
14.	Click the Yes button. 
15.	<i>Log In again</i> Enter the desired information into the field. Enter " Password ".
16.	Click the Log On button. 
17.	<i>Navigate to the bottom left of the page</i> Click the Preferences Expand button. 
18.	Click the User Variable Options tab. 
19.	<i>Navigate to the "Selected Member" column (contains a field and button)</i> Click the Scenario Member Selector button. 
20.	Click the Budget list item. 
21.	Click the Add button. 

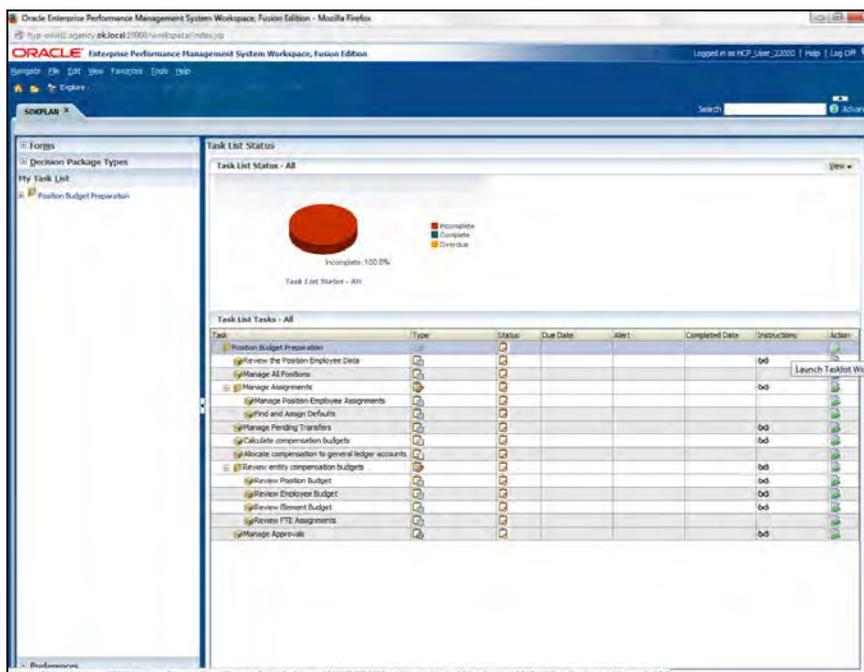
Step	Action
22.	Click the OK button. 
23.	<i>Navigate to the "Selected Member" column (contains a field and button)</i> Click the Version Member Selector button. 
24.	Click the Agency list item. 
25.	Click the Add button. 
26.	Click the OK button. 
27.	<i>Navigate to the "Selected Member" column (contains a field and button)</i> Click the Year Member Selector button. 
28.	Click the All Years Expand button. 
29.	Click the FY16 list item. 
30.	Click the Add button. 
31.	Click the OK button. 
32.	<i>Navigate to the "Selected Member" column (contains a field and button)</i> Click the Request Member Selector button. 
33.	Click the Total Request Expand button. 
34.	Click the Current Service Level list item. 
35.	Click the Add button. 
36.	Click the OK button. 
37.	Click the Save button. 

Step	Action
38.	<p><i>User Preferences have been saved.</i></p> <p>Click the OK button.</p> 
39.	<p>Navigate to the view pane</p> <p>Click the My Task List Expand button.</p> 
40.	<p>End of Procedure.</p>

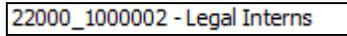
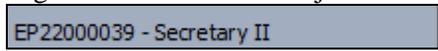
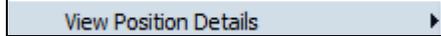
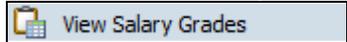
3.10B - Review the Position Employee Data

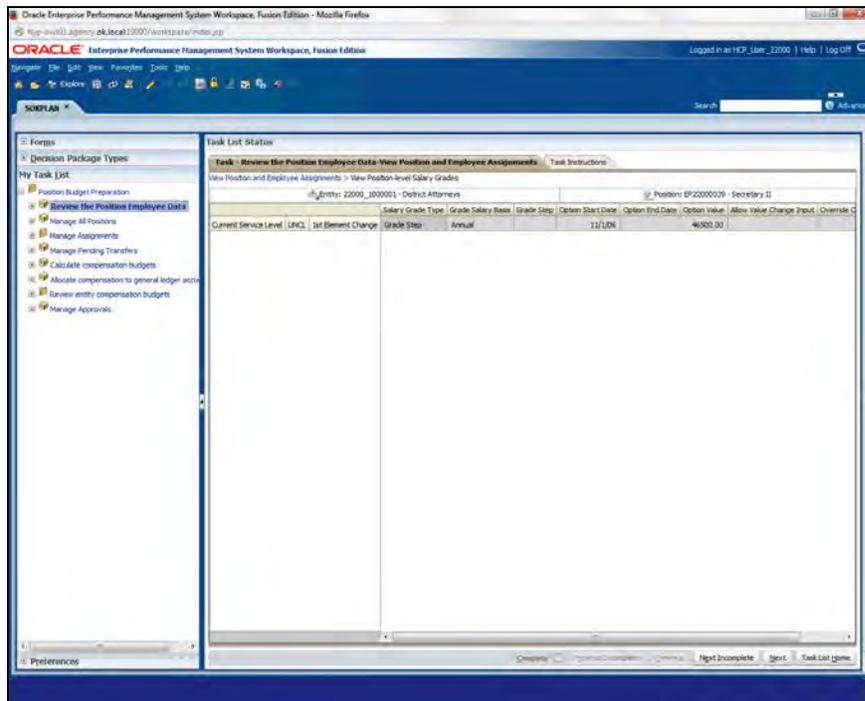
In this topic you will review all positions and employees pre-loaded for a specific department. Other elements, i.e. benefits, taxes, additional earnings, and allocations, will be reviewed.

Procedure

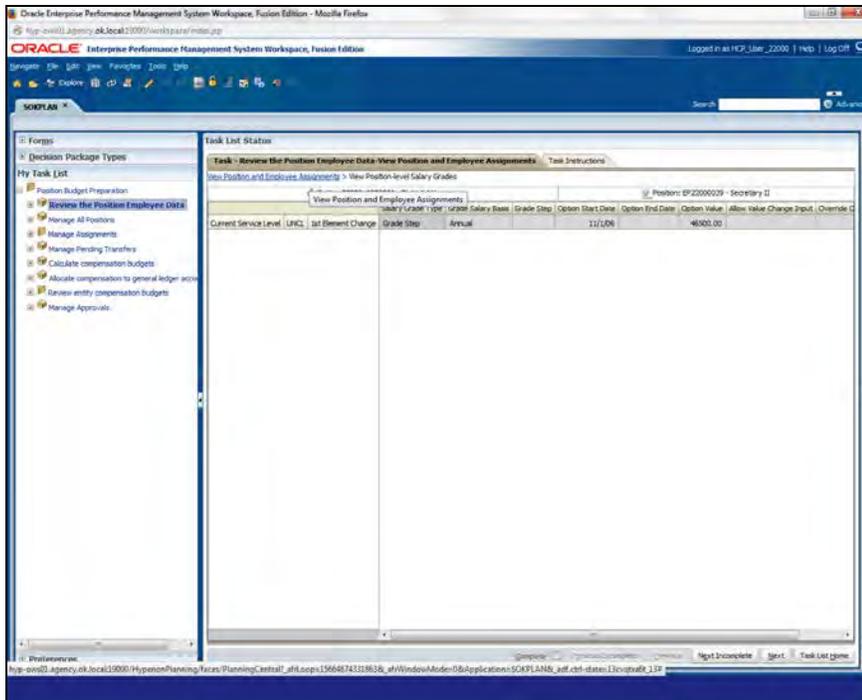


Step	Action
1.	<p>Click the Position Budget Preparation Action button.</p> 

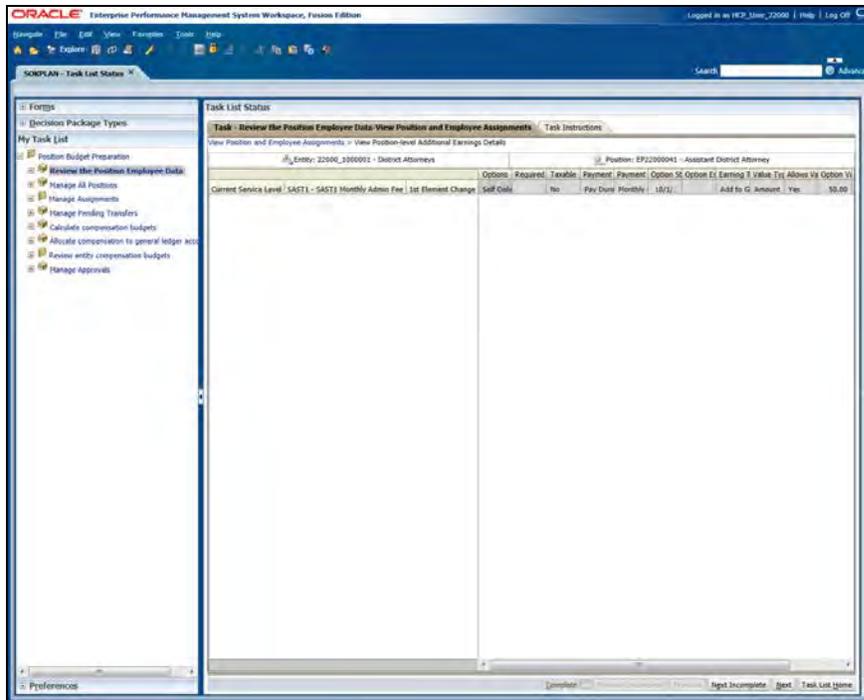
Step	Action
2.	<p>Locate the Entity field under the "Position's Employee Assignments" tab</p> <p>Click the Entity dropdown button to activate the menu.</p> 
3.	<p>E.g.:</p> <p>Click in the 22000_1000001 - District Attorneys field.</p> 
4.	<p>Click the Go button.</p> 
5.	<p>Right-click any of the positions</p> <p>Right-click the Positon object.</p> 
6.	<p>Click the View Position Details list item.</p> 
7.	<p>Click the View Salary Grades list item.</p> 



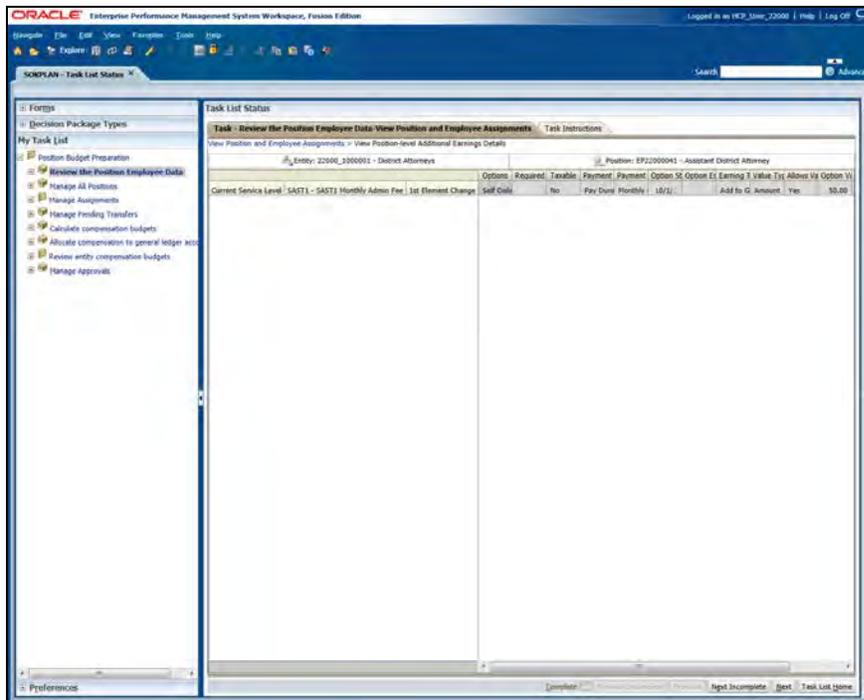
Step	Action
8.	Review Salary Grade information

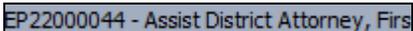
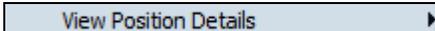
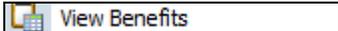


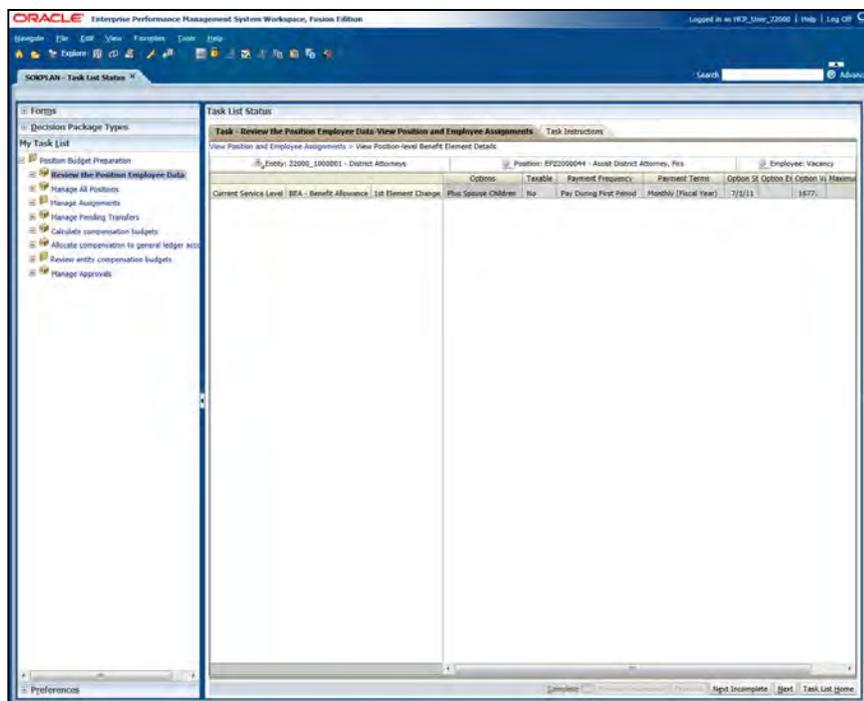
Step	Action
9.	Click the View Position and Employee Assignments link. View Position and Employee Assignments
10.	<i>E.g.:</i> Right-click in the EP22000041 - Assistant District Attorney field. EP22000041 - Assistant District Attorney
11.	Click the View Position Details list item. View Position Details
12.	Click the View Additional Earnings list item. View Additional Earnings



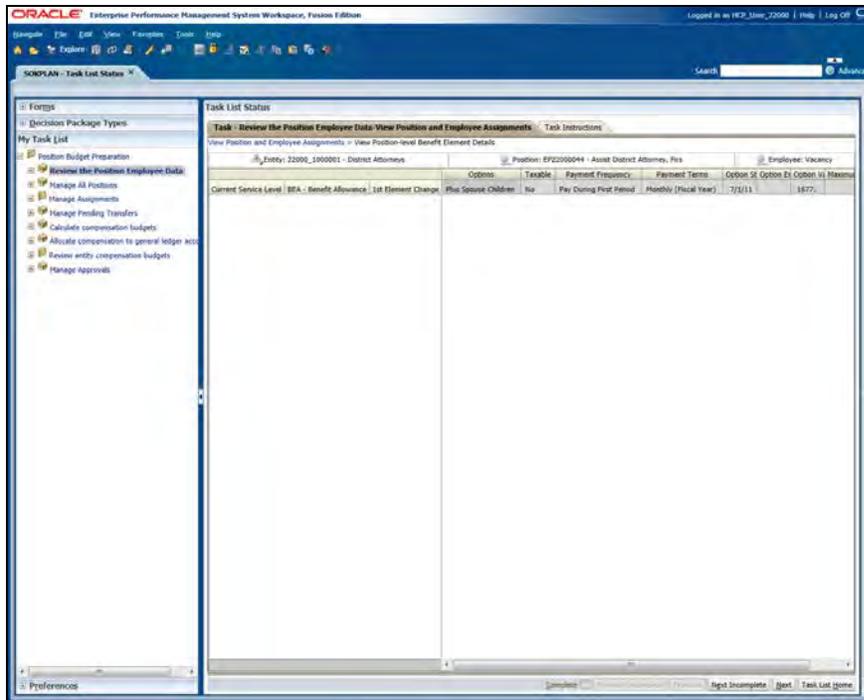
Step	Action
13.	Review Additional Earnings information (if any)



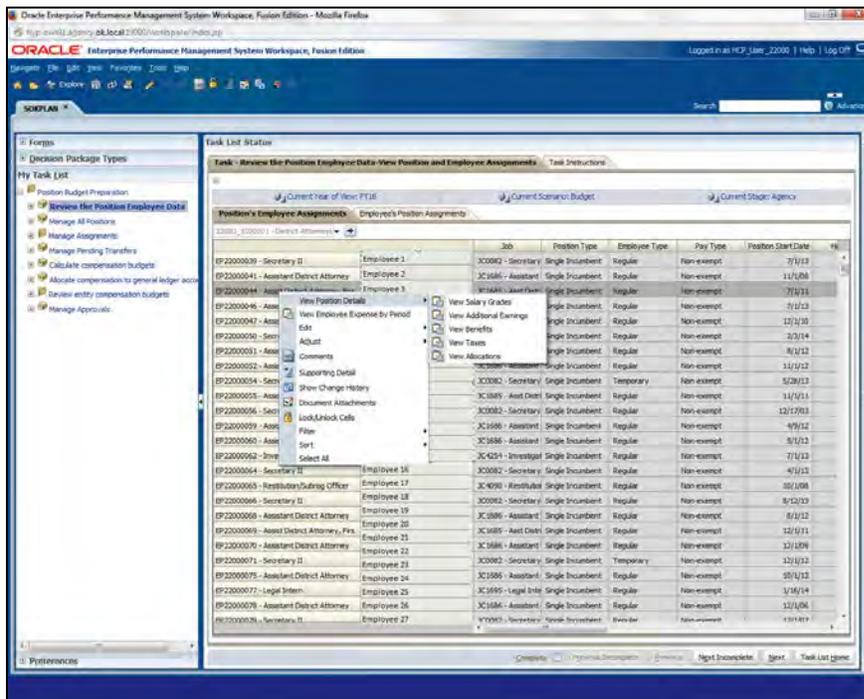
Step	Action
14.	Click the View Position and Employee Assignments link. 
15.	<i>E.g.:</i> Right-click in the EP22000044 - Assist District Attorney, Firs field. 
16.	Click in the View Position Details field. 
17.	Click in the View Benefits field. 

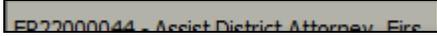
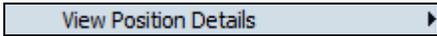
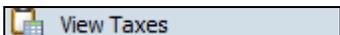


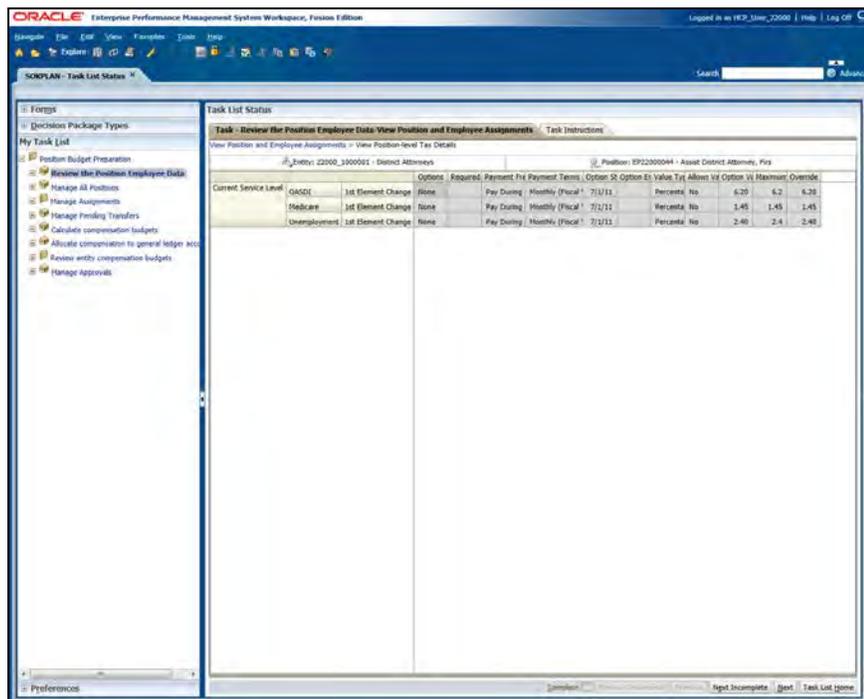
Step	Action
18.	Review Benefits information (if any)



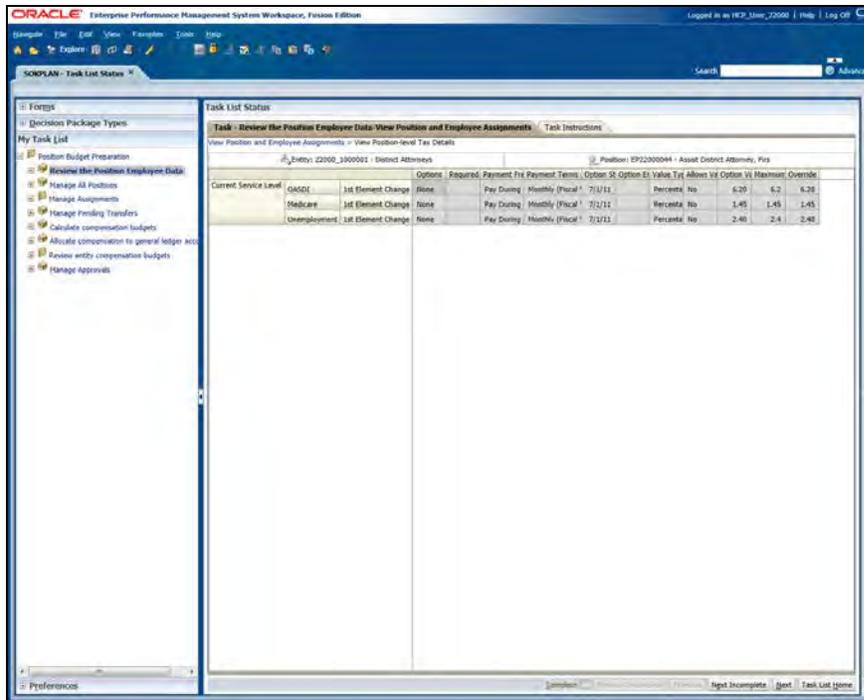
Step	Action
19.	Click the View Position and Employee Assignments link. View Position and Employee Assignments



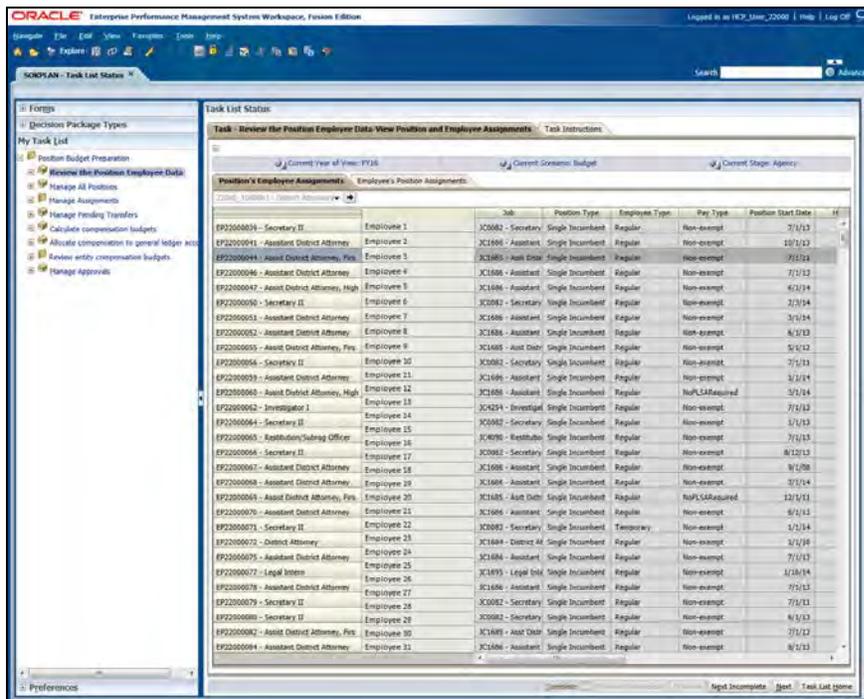
Step	Action
20.	<p><i>Right-click any of the positions</i></p> <p>Right-click in the Any Position field.</p> 
21.	<p>Click in the View Position Details field.</p> 
22.	<p>Click in the View Taxes field.</p> 



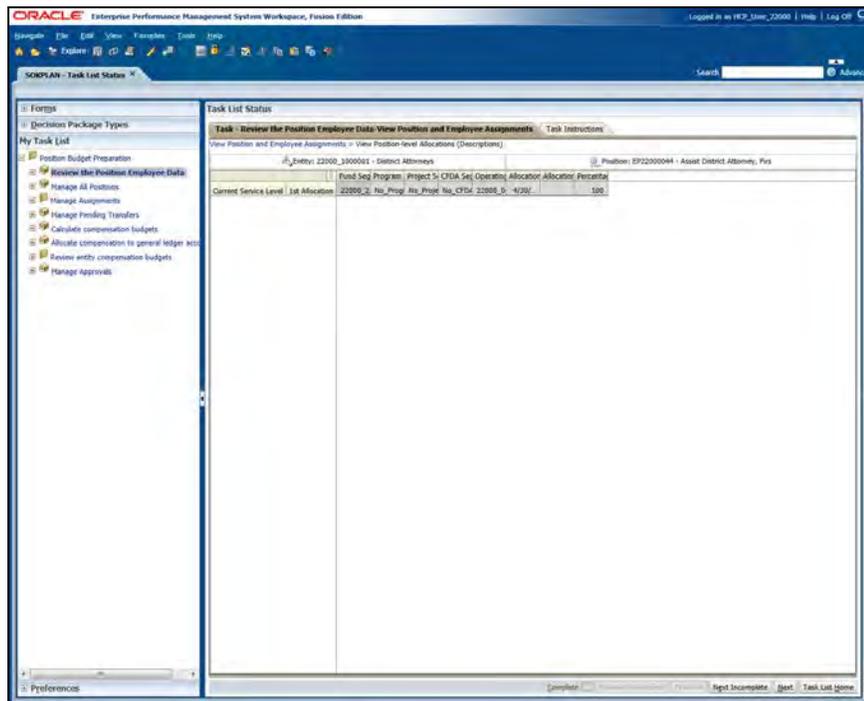
Step	Action
23.	Review View Taxes information (if any)



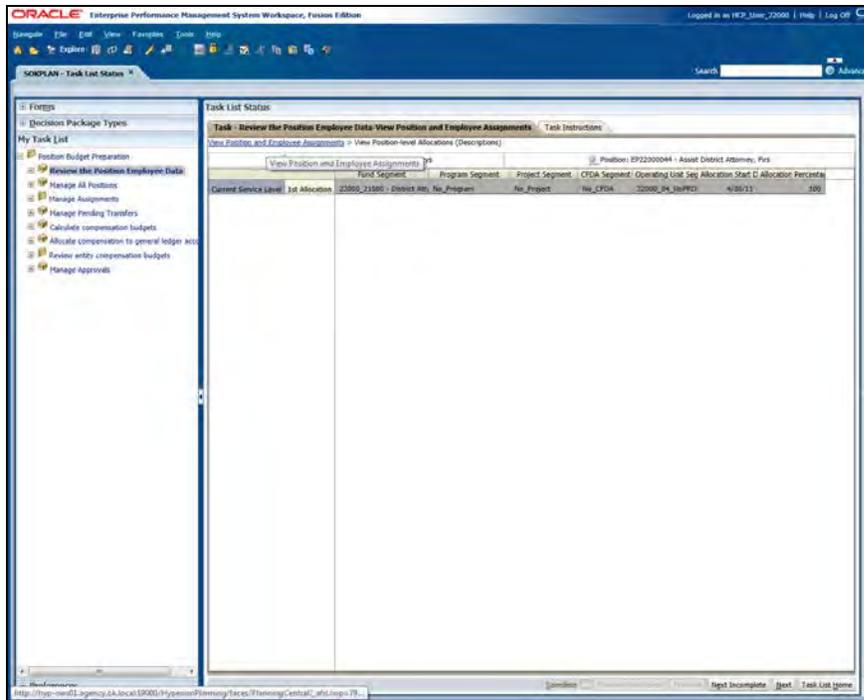
Step	Action
24.	Click the View Position and Employee Assignments link. View Position and Employee Assignments



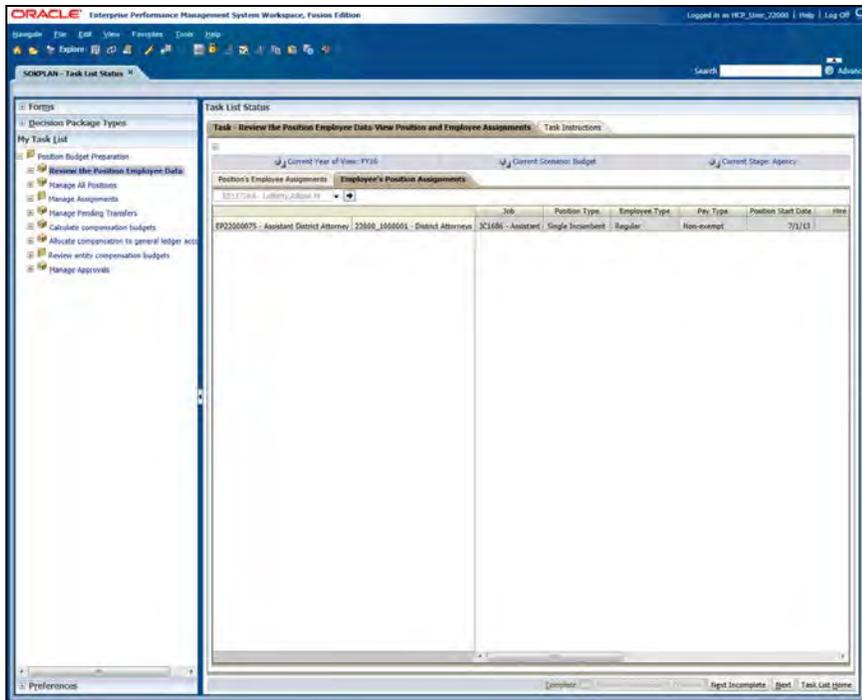
Step	Action
25.	<p><i>E.g.:</i></p> <p>Right-click the EP22000044 - Assist District Attorney, Firs object.</p> <p>EP22000044 - Assist District Attorney, Firs</p>
26.	<p>Click the View Position Details menu.</p> <p>View Position Details</p>
27.	<p>Click the View Allocations menu.</p> <p>View Allocations</p>



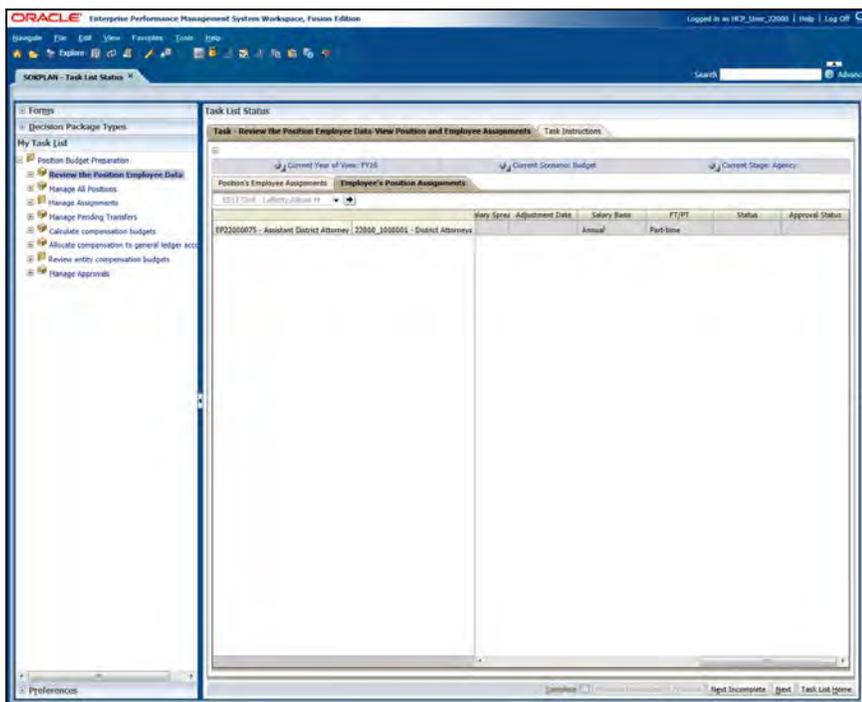
Step	Action
28.	<p><i>-Expand the columns as necessary</i></p> <p><i>-Review the allocation data</i></p>
29.	<p>Review Allocation information (if any)</p>

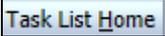


Step	Action
30.	Click the View Position and Employee Assignments link. View Position and Employee Assignments
31.	Click the Employee's Position Assignments tab. Employee's Position Assignments
32.	Click the Employee dropdown button to activate the menu. 
33.	<i>[NOTE: Please note that Users will be able to view all the State employees in the dropdown list but will be able to view data only for their agency users. Agency data is limited to the agency users only in this form.]</i> <i>Users can use this form to review all the positions and departments; the selected employee has been assigned to, during the current budget cycle.]</i> Enter the desired information into the Member field. Enter " EE117364 ".
34.	<i>E.g.:</i> Click the EE117364 - Lafferty, Allison M cell. EE117364 - Lafferty, Allison M
35.	Click the Go button. 



Step	Action
36.	-Use the horizontal scroll bar to scroll to the right of the page
37.	-Review the Employee Assignments



Step	Action
38.	Complete the "Review the Position Employee Data" Task Click the Complete option.
39.	Click the Task List Home button. 
40.	End of Procedure.

3.11 - Edit Position Details

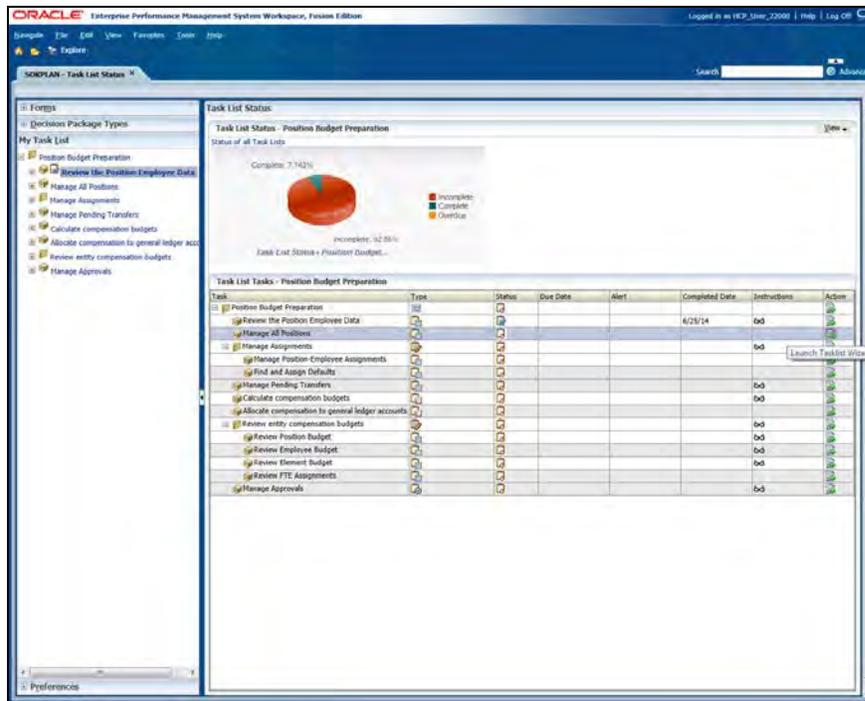
In this topic you will update salary grades, additional earnings, benefits, and allocations for a position.

You will review tax information.

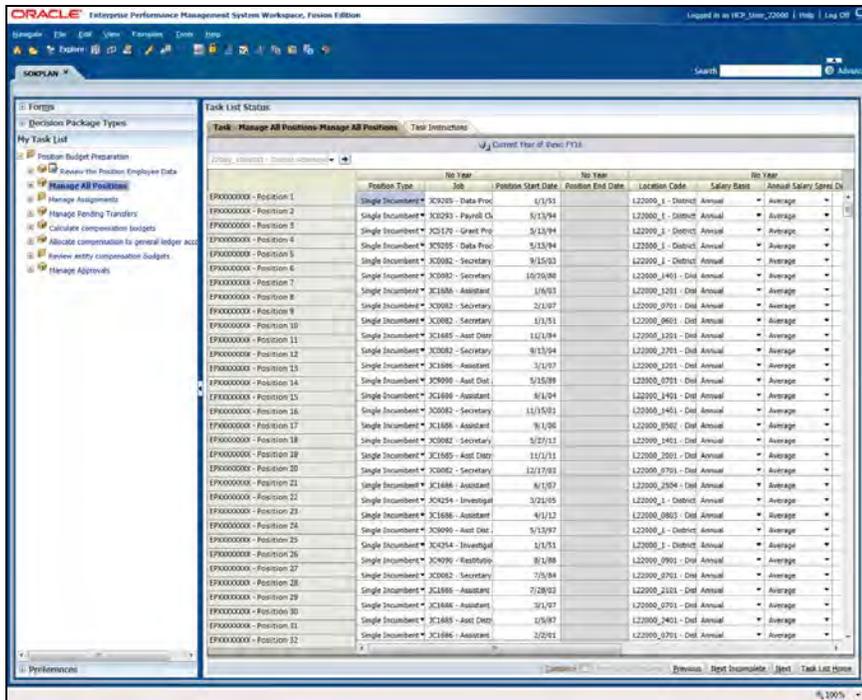
A to-be-hired employee will be assigned to a position.

An employee will be successfully transferred out, transferred in, and a transfer will be reversed.

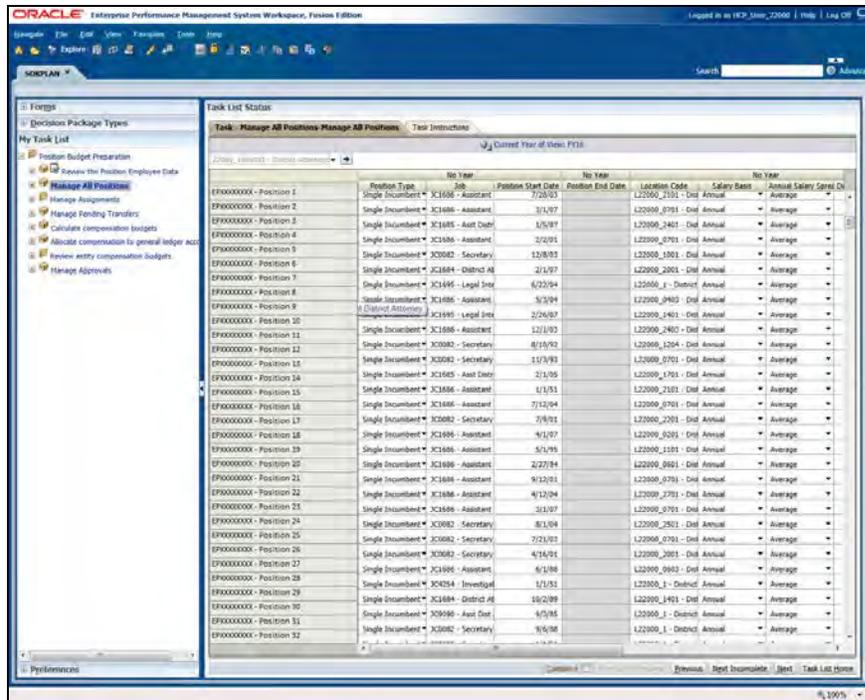
Procedure



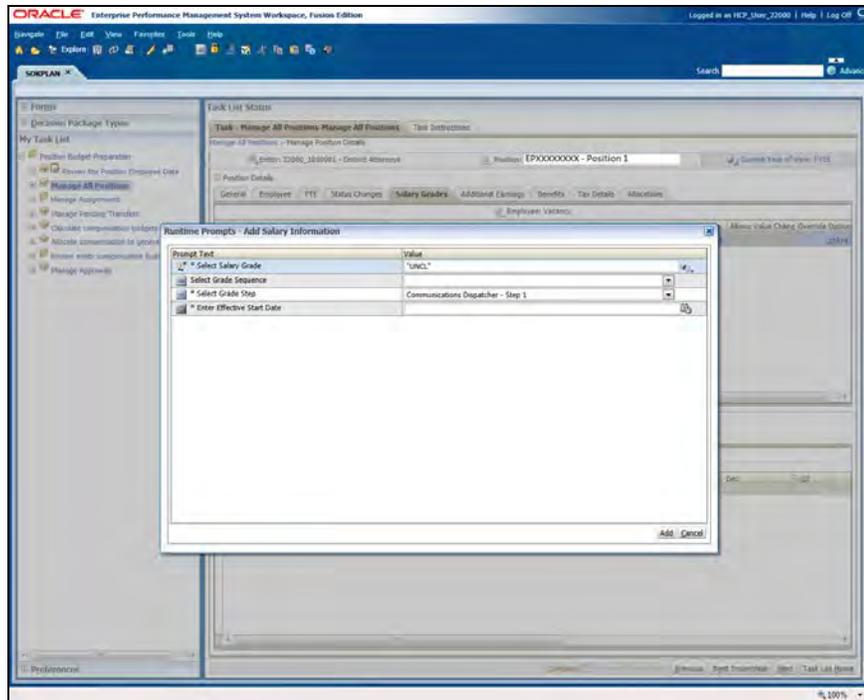
Step	Action
1.	Click the Mange All Positions Action button. 



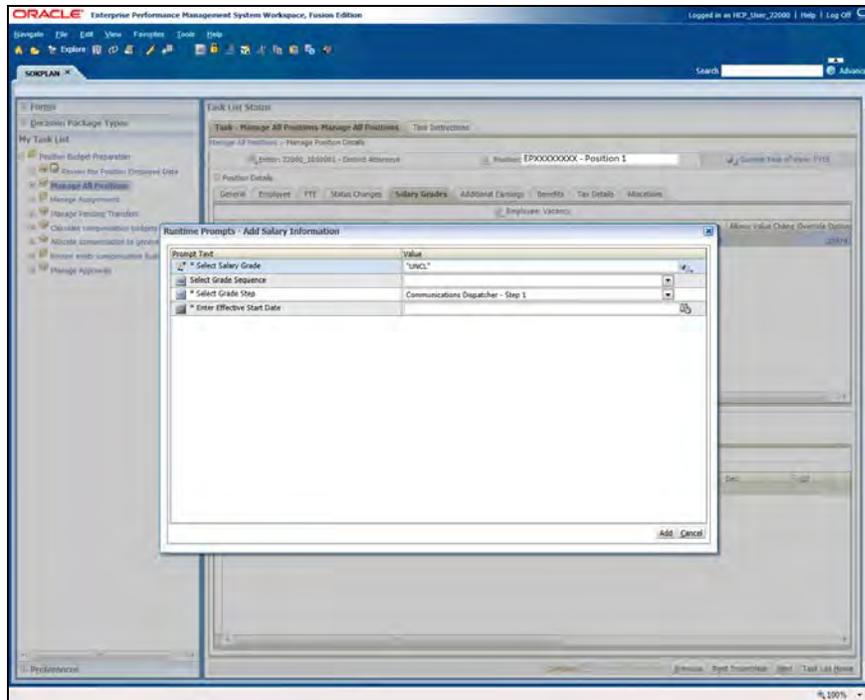
Step	Action
2.	<p><i>Manage All Positions:</i> <i>Entity should already be selected, if not please:</i> <i>-Select Entity in Page as < Select Desired DEptID> for example: 22000_1000001</i></p> <p><i>Once you click on Go: the form will display all the positions, filled as well as vacant in the form.</i> <i>Unlike, Review the position Employee Data that shows only filled positions.</i></p> <p>22000_1000001 - District Attorneys</p>
3.	<p><i>Use the vertical Scroll Bar to navigate to any position.</i></p> <p><i>E.g.:</i></p> <p><i>EP22000075 - Assistant District Attorney</i></p> <p>EP22000075 - Assistant District Attorney</p>

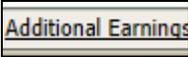
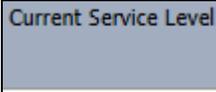


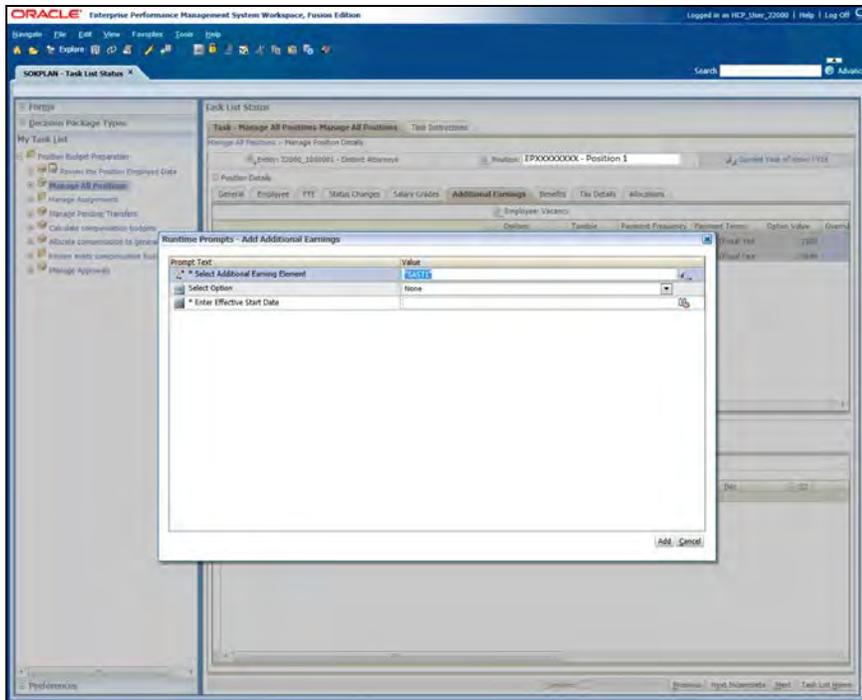
Step	Action
4.	<p><i>Right-click a position</i></p> <p><i>E.g.:</i></p> <p>Right-click the Position 8 object.</p> <div style="border: 1px solid black; padding: 2px; width: fit-content;">EPXXXXXXXX - Position 8</div>
5.	<p>Click the Edit Position Details menu.</p> <div style="border: 1px solid black; padding: 2px; width: fit-content;">  Edit Position Details </div>
6.	<p>Click the Salary Grades tab.</p> <div style="border: 1px solid black; padding: 2px; width: fit-content;">Salary Grades</div>
7.	<p>Right-click the Row Header object.</p> <div style="border: 1px solid black; padding: 2px; width: fit-content;">Current Service Level</div>
8.	<p>Click the Add Salary Information list item.</p> <div style="border: 1px solid black; padding: 2px; width: fit-content;">Add Salary Information</div>



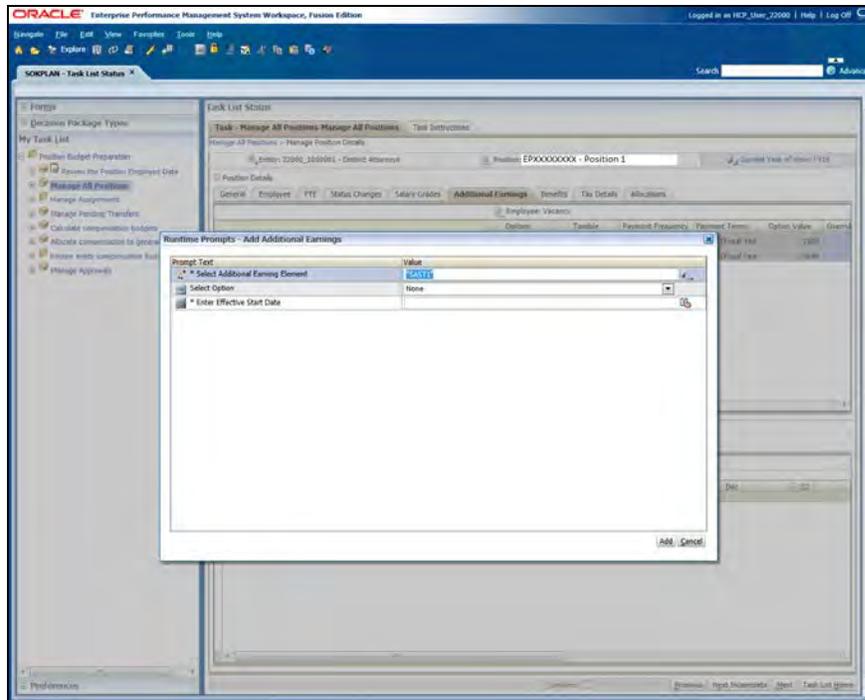
Step	Action
9.	<p><i>Add Salary Information</i></p> <p><i>-Enter/Select values for all the fields:</i></p> <p><i>Select Salary Grade: CLAS-A</i></p> <p><i>Select Grade Step: Communications Dispatcher - Step 1</i></p> <p><i>Enter Effective Start Date: 1/1/14</i></p>



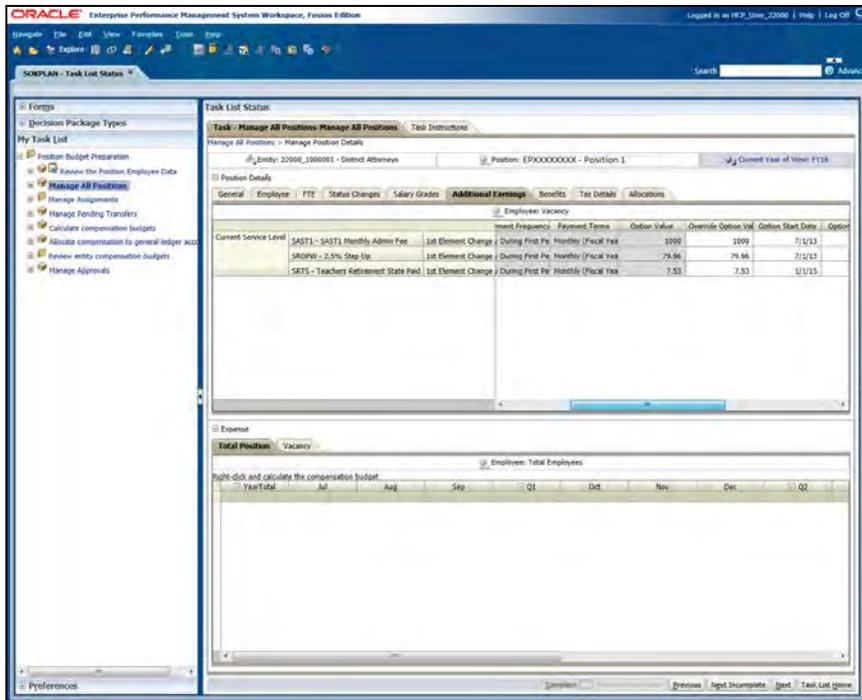
Step	Action
10.	Enter the desired information into the *Select Salary Grade field. Enter " CLAS-A ".
11.	Enter the desired information into the *Enter Effective Start Date field. Enter " 1/1/14 ".
12.	Click the Add button. 
13.	A message appears reading "AddSalElement was successful" Click the OK button. 
14.	Click the Additional Earnings tab. 
15.	Right-click the Row Header row header. 
16.	Click the Add Additional Earnings list item. 



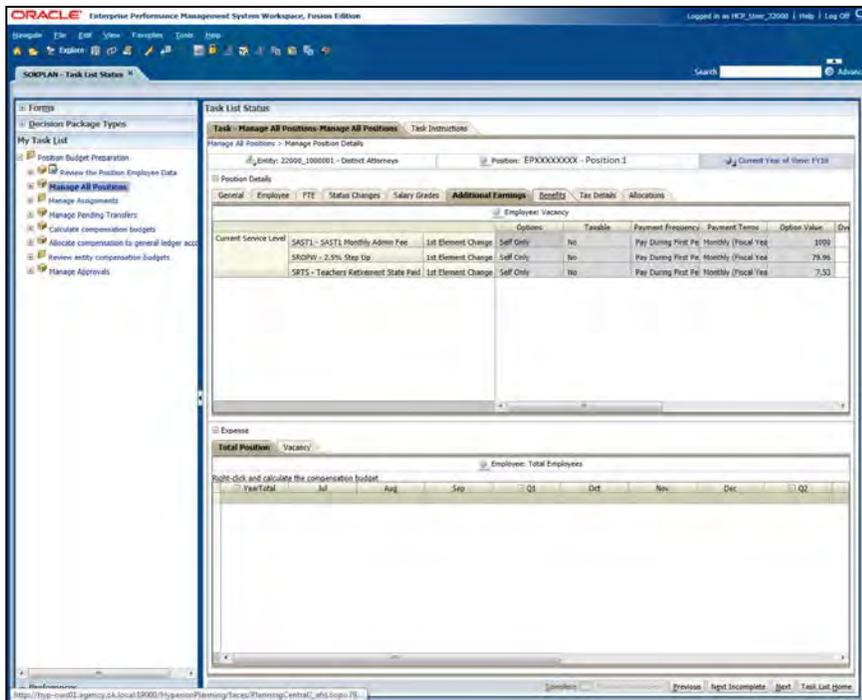
Step	Action
17.	<p><i>Add Additional Earnings</i></p> <ul style="list-style-type: none"> -Enter/Select values for all the fields Select Additional Earnings: SRTS Select Option: Self Only Enter Effective Start Date: 1/1/15 -Click the "Add" button

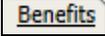
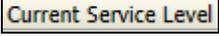
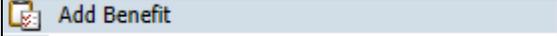


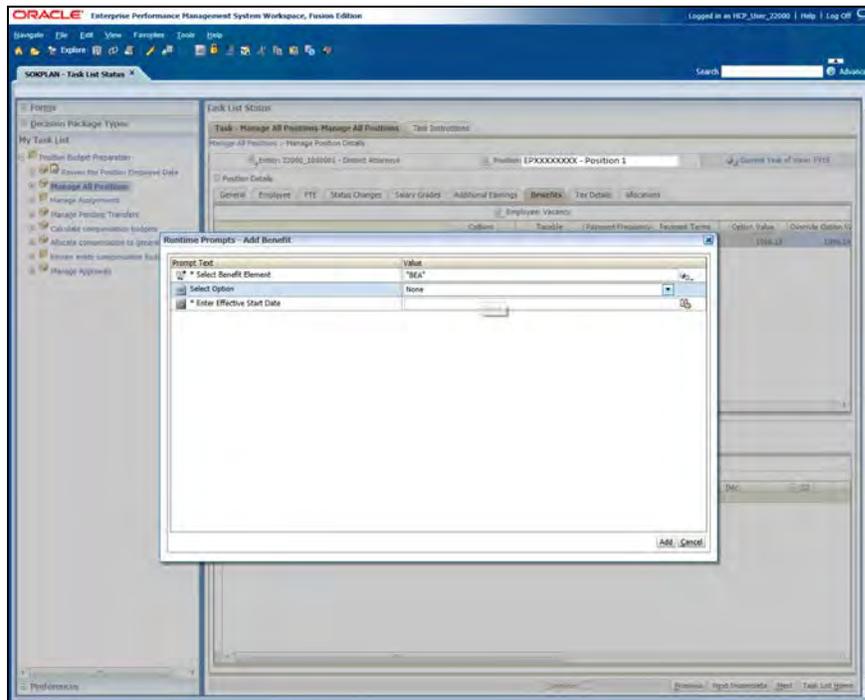
Step	Action
18.	Enter the desired information into the *Select Additional Earning Element field. Enter "SRTS" .
19.	Click the Select Option list.
20.	Click the Self Only list item.
21.	Enter the desired information into the *Enter Effective Start Date field. Enter "1/1/15" .
22.	Click the Add button. 
23.	A message displays reading: <i>"AddAdditionalEarning was successful"</i> Click the OK button. 



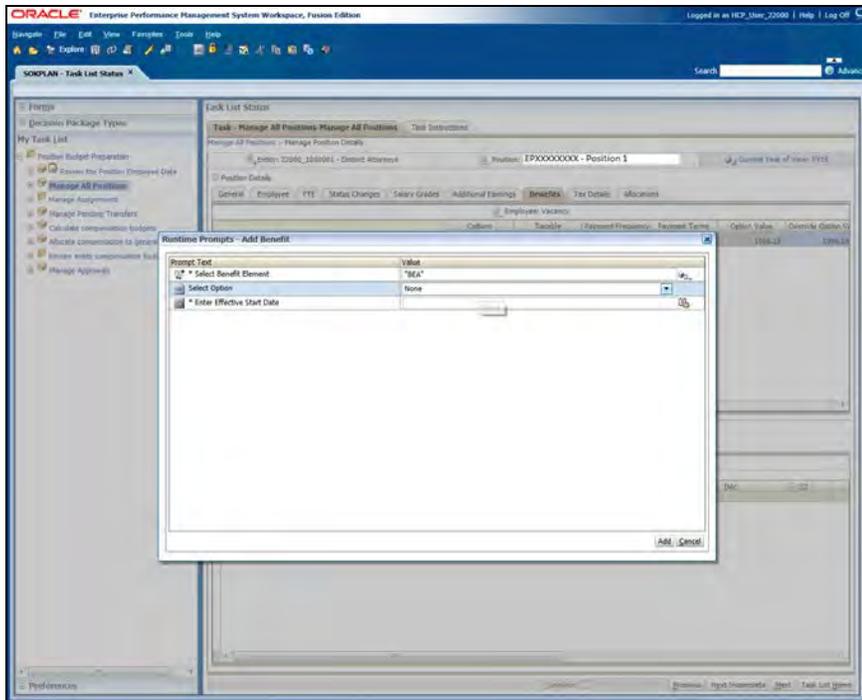
Step	Action
24.	Use the horizontal scroll bar to scroll to the end of the form

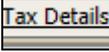


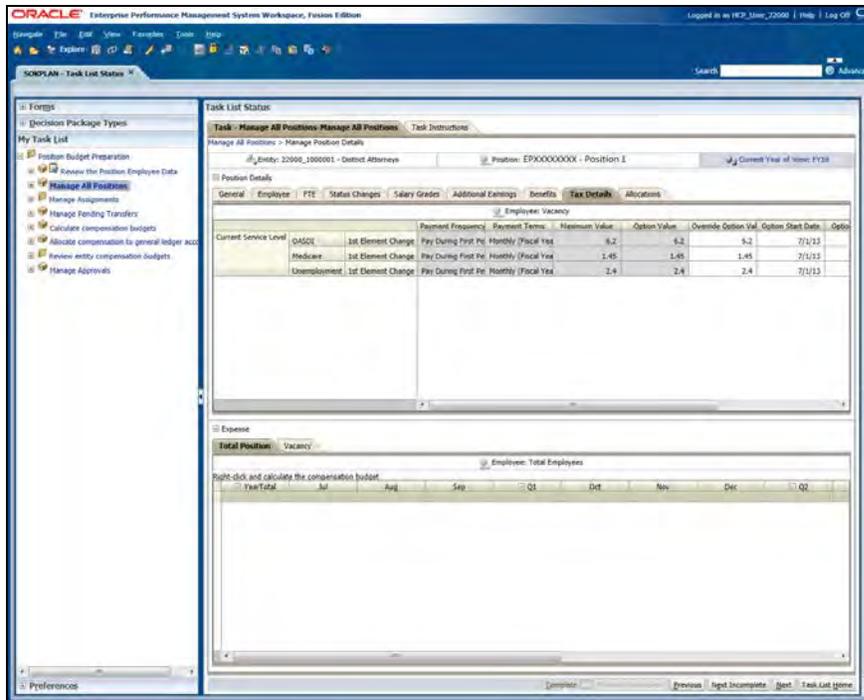
Step	Action
25.	Click the Benefits tab. 
26.	Right-click the Row Header object. 
27.	Click the Add Benefit menu. 



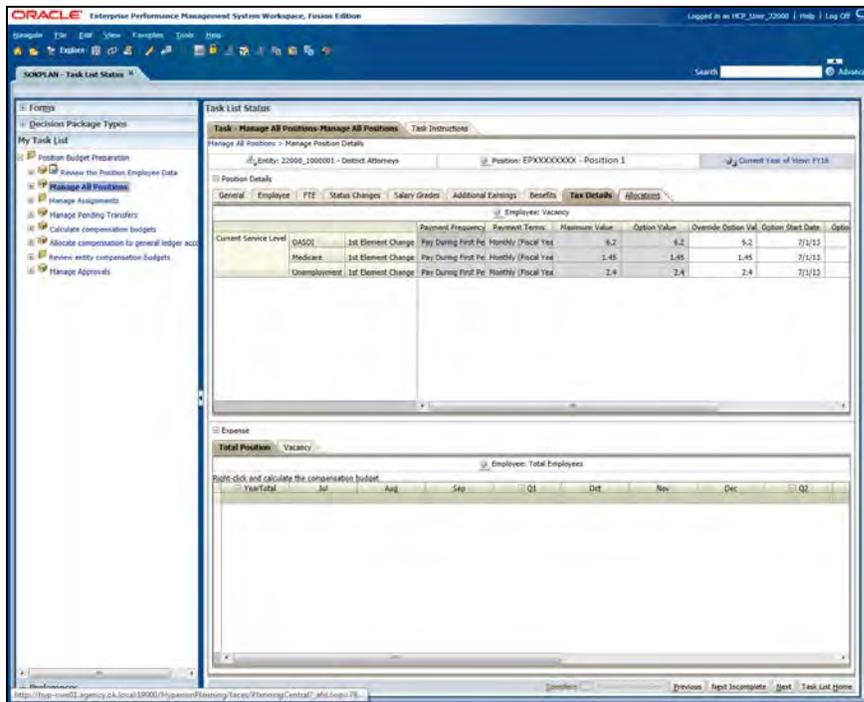
Step	Action
28.	Verify that "BEA" is selected benefit element

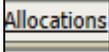
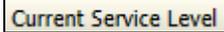
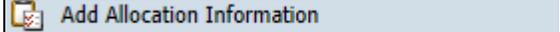


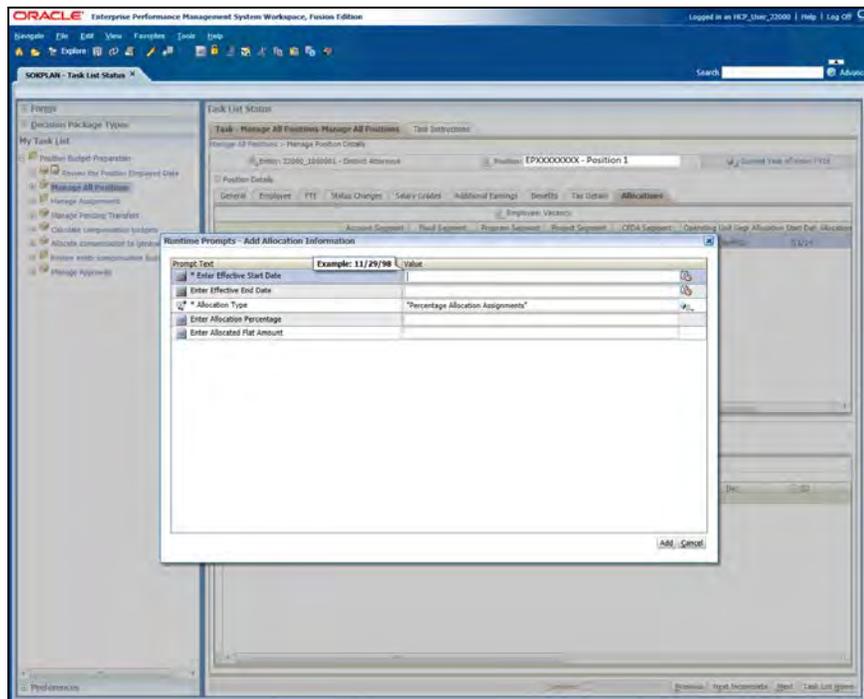
Step	Action
29.	Click the Select Option list.
30.	Click the Plus Spouse list item.
31.	Enter the desired information into the *Enter Effective Start Date field. Enter "1/1/15" .
32.	Click the Add button. 
33.	A message displays reading "AddBenefitElement was successful." Click the OK button. 
34.	Click the Tax Details tab. 



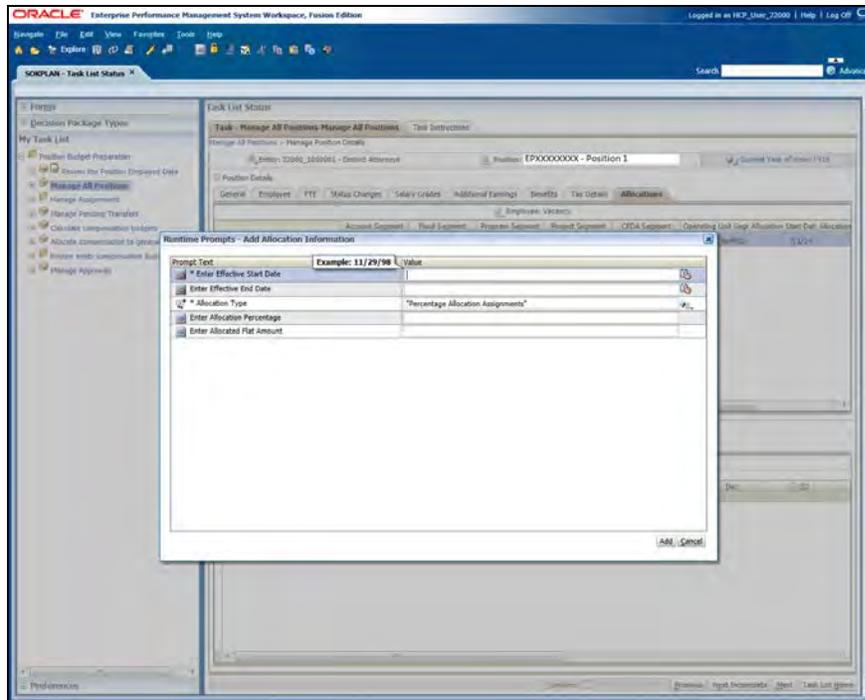
Step	Action
35.	Review the tax details

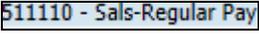


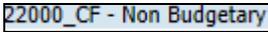
Step	Action
36.	Click the Allocations tab. 
37.	Right-click the Row Header object. 
38.	Click the Add Allocation Information menu. 

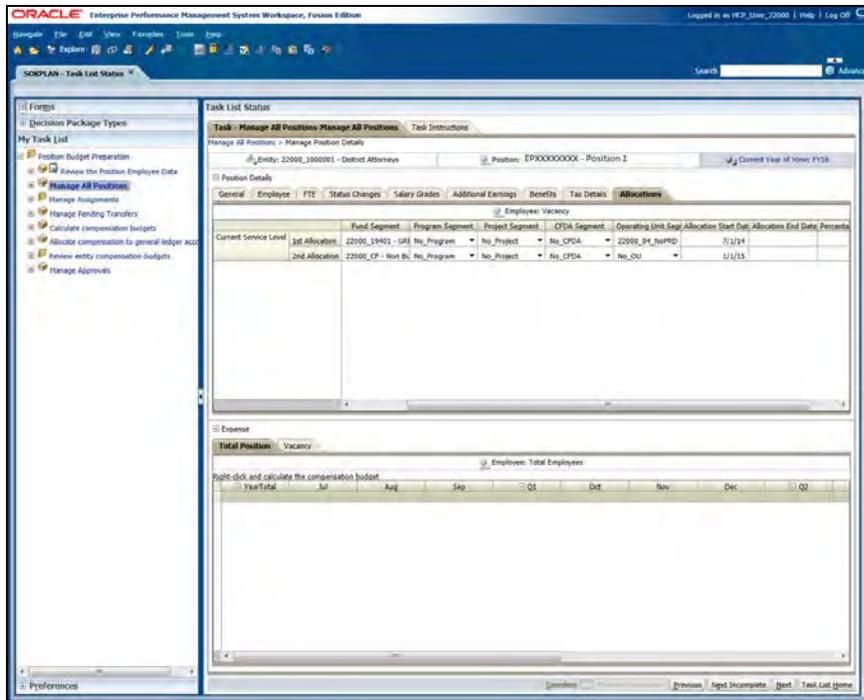


Step	Action
39.	<i>Provide Allocations</i> -Enter/Select values for all the fields Enter Effective Start Date: 1/1/15 Enter Effective End Date: Leave Blank Allocation Type: Percentage Allocation Assignments Enter Allocated Percentage: 20 Enter Allocated Flat Amount: Leave Blank

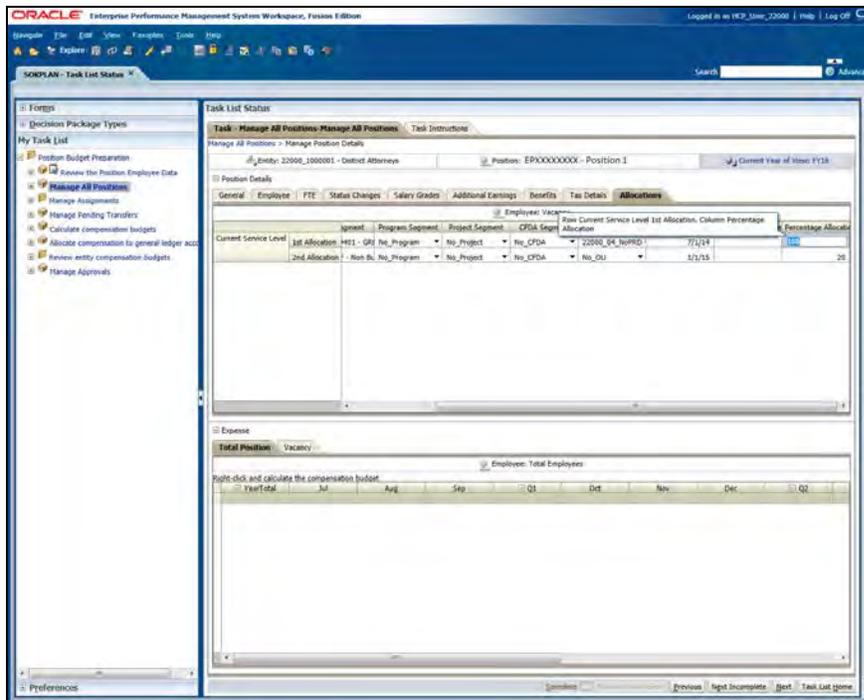


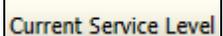
Step	Action
40.	Enter the desired information into the *Enter Effective Start Date field. Enter "1/1/15" .
41.	Enter the desired information into the Enter Allocation Percentage field. Enter "20" .
42.	Click the Add button. 
43.	A message displays reading: "AddDistribution was successful." Click the OK button. 
44.	Click the Account Segment SmartList button. 
45.	Enter the desired information into the Member field. Enter "5111" .
46.	E.g.: Click the 511110 - Sals-Regular Pay cell. 
47.	Click the Fund Segment SmartList button. 
48.	Enter the desired information into the Name field. Enter "22000_cf" .

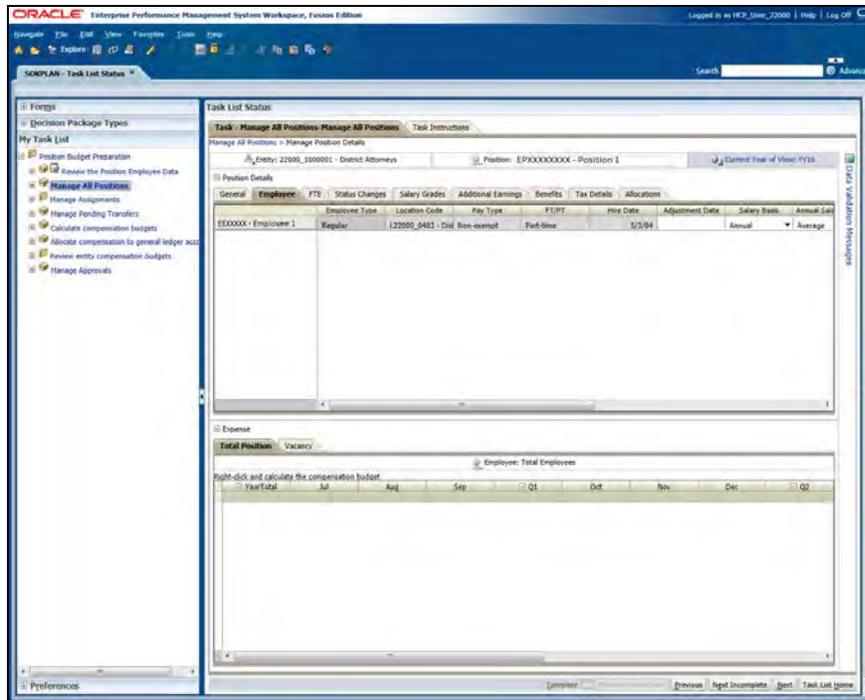
Step	Action
49.	<p><i>E.g.:</i></p> <p>Click the 22000_CF - Non Budgetary cell.</p> 
50.	<p>Click the Program Segment SmartList button.</p> 
51.	<p>Enter the desired information into the Name field. Enter "no_".</p>
52.	<p>Click the No_Program cell.</p> 
53.	<p>Click the Project Segment SmartList button.</p> 
54.	<p>Enter the desired information into the Name field. Enter "no_".</p>
55.	<p><i>E.g.:</i></p> <p>Click the No Project cell.</p> 
56.	<p>Click the CFDA Segment SmartList button.</p> 
57.	<p>Enter the desired information into the Name field. Enter "no_".</p>
58.	<p>Click the No_CFDA cell.</p> 
59.	<p>Click the Operating Unit SmartList button.</p> 
60.	<p>Enter the desired information into the Name field. Enter "no_".</p>
61.	<p>Click the No_OU cell.</p> 
62.	<p>Click the Save button.</p> 
63.	<p>A message displays reading: "<i>The data has been saved.</i>"</p> <p>Click the OK button.</p> 



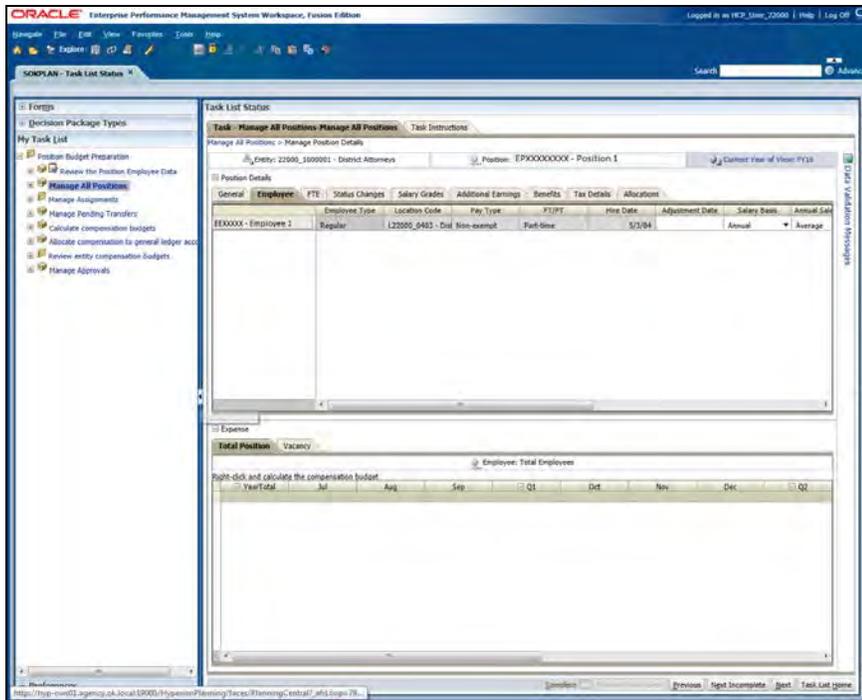
Step	Action
64.	<i>Use the horizontal scroll bar to scroll to the right</i>

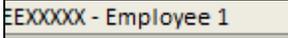
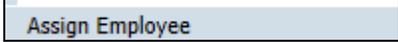
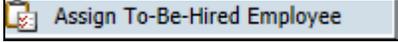


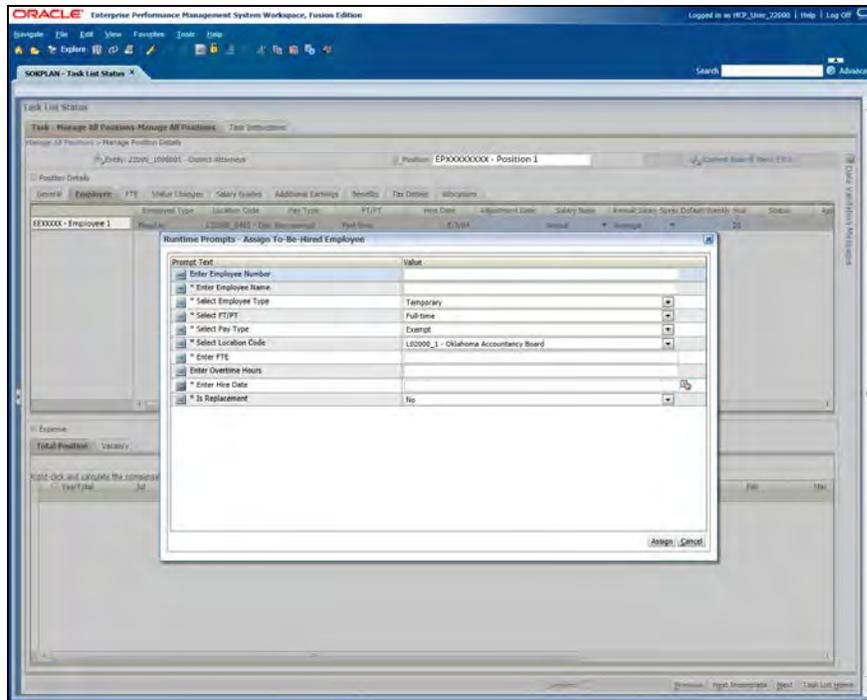
Step	Action
65.	<p>The total percentage allocation for all lines should be equal to 100</p> <p>If required, do the following:</p> <p>Enter the desired information into the Percentage Allocation for first Allocation field. Enter "80".</p>
66.	<p>Click the Save button.</p> 
67.	<p>A message appears reading: "The data has been saved."</p> <p>Click the OK button.</p> 
68.	<p>Click the FTE tab.</p> 
69.	<p>Right-click the Row Header object.</p> 
70.	<p>Click the Update FTE menu.</p> 
71.	<p>Enter the desired information into the Enter FTE field. Enter ".5".</p>
72.	<p>Enter the desired information into the Enter Effective Start Date field. Enter "1/1/15".</p>
73.	<p>Click the Add button.</p> 
74.	<p>A message displays reading "AddFTE was successful."</p> <p>Click the OK button.</p> 
75.	<p>Click the Employee tab.</p> 



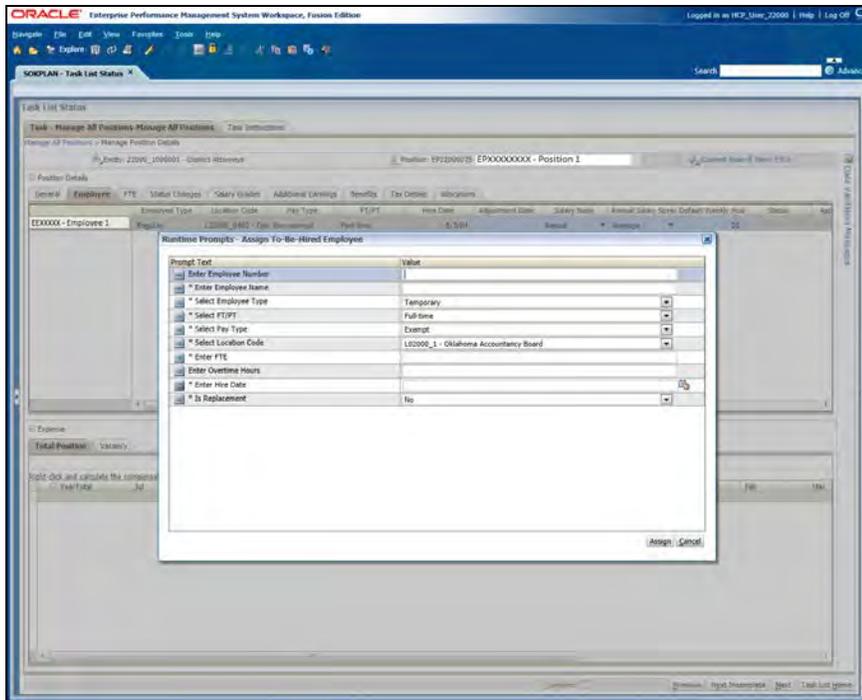
Step	Action
76.	<p>Review the employee details – you will see an employee if the selected position has employee assigned to it otherwise it will be blank.</p> <p>Do not assign more than one employee to the single incumbent position. You may assign more than one employee to a shared position.</p> <p>Note that Calculating compensation budget (step 150) updates the Status, FTE and approval status for a position or employee. Calculating compensation budget will also restrict you from assigning employee with more than "Position's proposed FTE" or assigning more than one employee to "single_incumbent positions".</p>



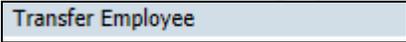
Step	Action
77.	<p><i>Hide the View Pane (if not already hidden)</i></p> <p>Click the Collapse Pane button.</p> 
78.	<p><i>Select the employee</i></p> <p><i>E.g.:</i></p> <p>Right-click the Employee 1 object.</p> 
79.	<p>Click the Assign Employee menu.</p> 
80.	<p>Click the Assign To-Be-Hired Employee menu.</p> 

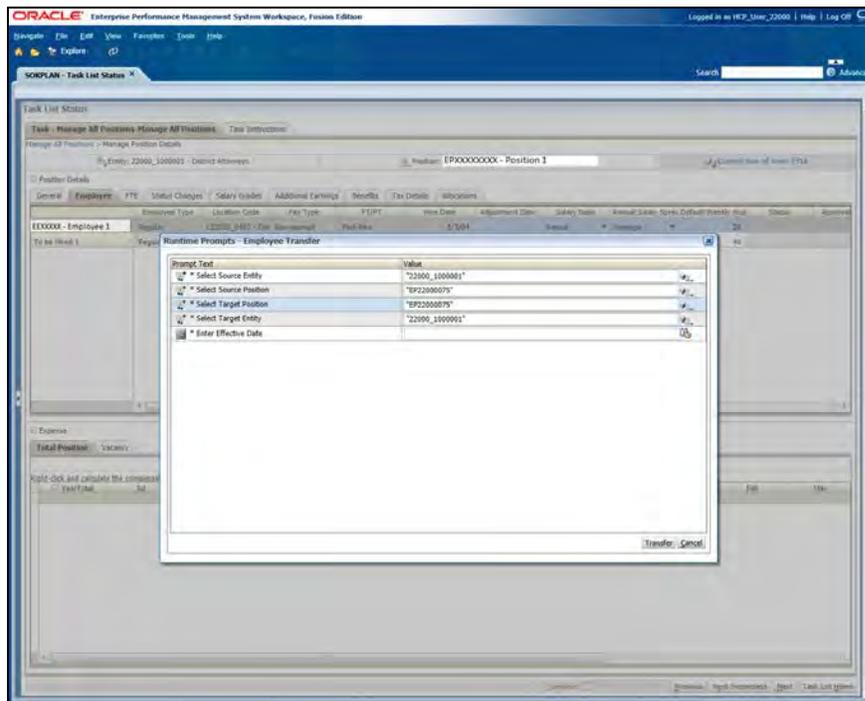


Step	Action
81.	<p><i>Provide Assign-To-Be-Hired Employee Details</i></p> <p><i>-Enter/Select values for all the fields</i></p> <p><i>Enter Employee Number: 100001</i></p> <p><i>Enter Employee Name: Lynn Smith</i></p> <p><i>Enter Employee Type: Regular</i></p> <p><i>Select FT/PT: Full-Time</i></p> <p><i>Select Pay Type: Non-exempt</i></p> <p><i>Select Location Code: L02500_16 - Oklahoma Military Department</i></p> <p><i>Enter FTE: .5</i></p> <p><i>Enter Overtime Hours: Leave Blank</i></p> <p><i>Enter Hire Date: 10/15/92</i></p> <p><i>Is Replacement?: No</i></p>

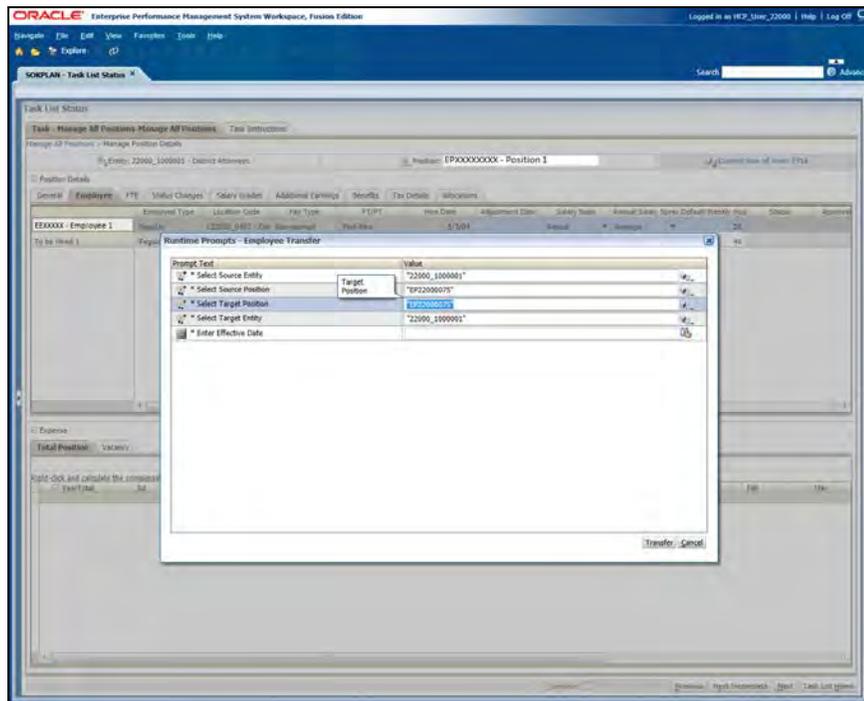


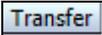
Step	Action
82.	Enter the desired information into the Enter Employee Number field. Enter " EE100001 ".
83.	Enter the desired information into the *Enter Employee Name field. Enter " Lynn Smith ".
84.	Click the *Select Employee Type list.
85.	Click the Regular list item.
86.	Click the *Select Pay Type list.
87.	Click the Non-exempt list item.
88.	<p>*Select Location Code.</p> <p>In order to be able to select the location code in our agency. Click on the drop down button and type "L" and your agency number quickly. for example, type "L22000" to get to all location codes in your agency.</p> <p>Click the *Select Location Code list.</p>
89.	Click the L02500_16 - Oklahoma Military Department list item.
90.	Enter the desired information into the *Enter FTE field. Enter " .5 ".
91.	Enter the desired information into the *Enter Hire Date field. Enter " 10/15/92 ".
92.	<p>Click the Assign button.</p> <p></p>

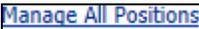
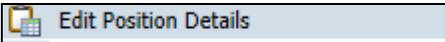
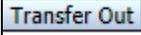
Step	Action
93.	A message box displays reading: <i>FillPosition was successful</i> Click the OK button. 
94.	<i>E.g.:</i> Right-click the Employee 1 object. 
95.	Click the Transfer Employee menu. 
96.	Click the Single-step Employee Transfer menu. 
97.	A message appears reading <i>"Do you want to transfer this employee assignment?"</i> Click the OK button. 

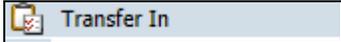


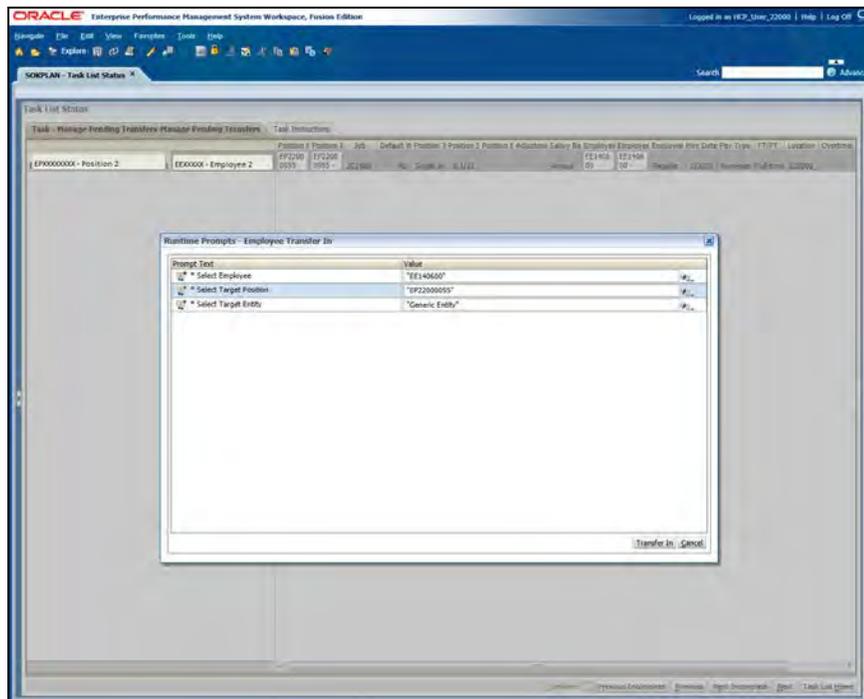
Step	Action
98.	<p>-Enter/Select values for all the fields Select Source Entity: < Select Desired DeptID> for example: 22000_1000001 Select Source Position: for example: EP22000075 Select Target Position: for Example: EP22000055 Select Target Entity: < Select Desired DeptID> for example: 22000_1000001 Enter Effective Date: 12/31/14</p> <p>[NOTE: Select the target position that exists in the target entity. Target entity should be the lowest level (Dept ID) of entity.]</p>



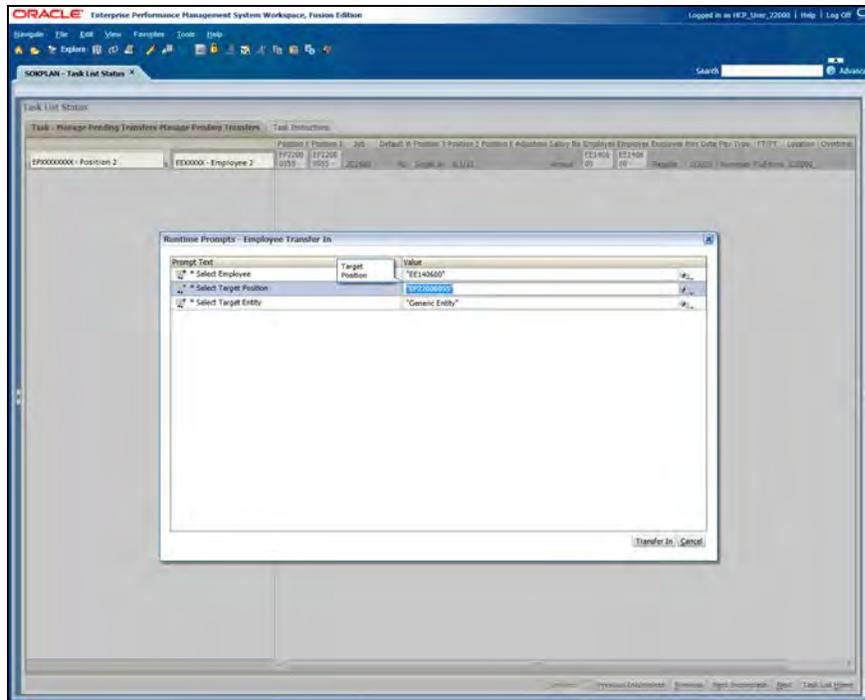
Step	Action
99.	Enter the desired information into the *Select Target Position field. Enter "EP22000055" .
100.	Enter the desired information into the *Enter Effective Date field. Enter "12/31/14" .
101.	Click the Transfer button. 
102.	A message appears reading "EmployeeTransfer was successful" Click the OK button. 

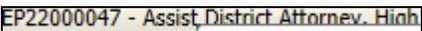
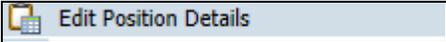
Step	Action
103.	Click the Manage All Positions link. 
104.	<i>E.g.:</i> Right-click the Position row header. 
105.	Click the Edit Position Details menu. 
106.	Click the Employee tab. 
107.	<i>[NOTE: Make sure that you right click on the employee that you transferred out. The employee in the first prompt select employee will be the same employee, change the target position and change the target entity to desired values. Make sure that you select the lowest level for the entity.]</i> Right-click the Employee 2 object. 
108.	Click the Transfer Employee menu. 
109.	Click the Transfer Out an Employee menu. 
110.	<i>A message appears reading "Do you want to transfer out this employee assignment?"</i> Click the OK button. 
111.	Enter the desired information into the *Enter Effective Date field. Enter " 6/1/15 ".
112.	Click the Transfer Out button. 
113.	<i>A message appears reading "EmployeeTransferOut was successful."</i> Click the OK button. 
114.	<i>Open the View Pane (if not already open)</i> Click the Restore Pane button. 
115.	Click the Manage Pending Transfers object. 

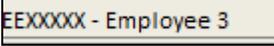
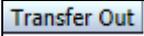
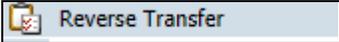
Step	Action
116.	Click the Collapse Pane button. 
117.	Right-click the Employee 2 object. 
118.	Click the Transfer In menu. 



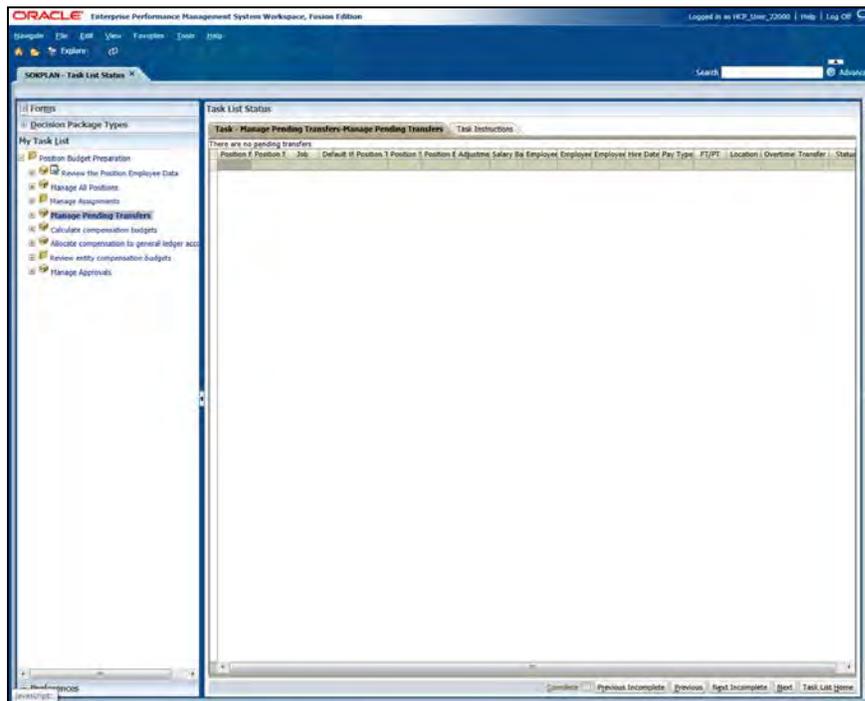
Step	Action
119.	-Select values for all the Select Employee: for example: EE140600 Select Target Position, for example: EP22000007 Select Target Entity: < Select Desired DeptID> for example: 22000_1000001



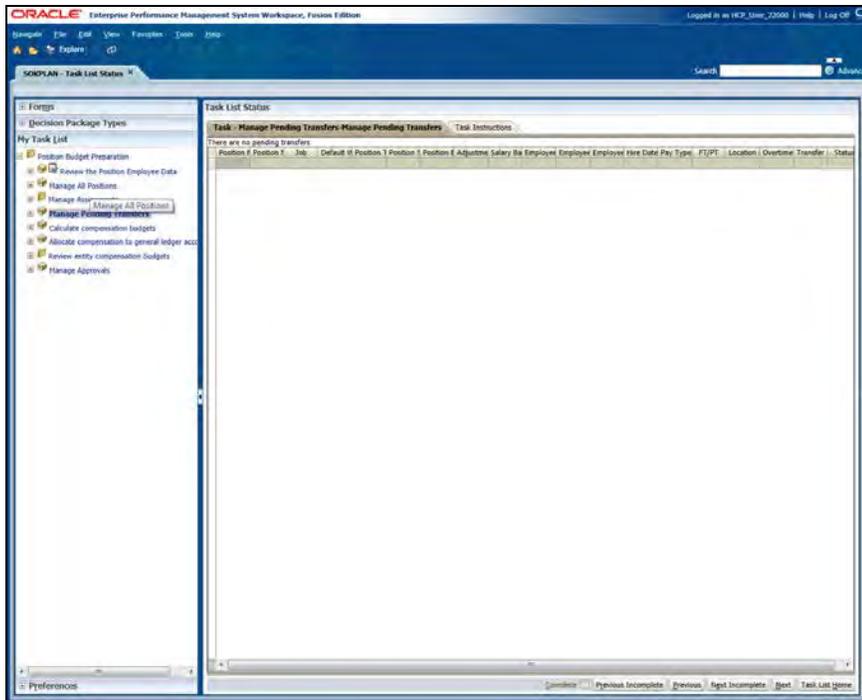
Step	Action
120.	Enter the desired information into the Select Target Position field. Enter " EP22000047 ".
121.	Enter the desired information into the Select Target Entity field. Enter " 22000_100001 ".
122.	Click the Transfer In button. 
123.	Click the Restore Pane button. 
124.	Click the Manage All Positions object. 
125.	Click the Collapse Pane button. 
126.	Right-click the Position object. 
127.	Click the Edit Position Details menu. 
128.	Click the Employee tab. 

Step	Action
129.	<p>-Verify that there are users, for example: EE163160, EE140600</p> <p>Right-click the Employee object.</p> 
130.	<p>Click the Transfer Employee menu.</p> 
131.	<p>Click the Transfer Out an Employee menu.</p> 
132.	<p>A message displays reading: "Do you want to transfer out this employee assignment?"</p> <p>Click the OK button.</p> 
133.	<p>Enter the desired information into the *Enter Effective Date field. Enter "5/1/15".</p>
134.	<p>Click the Transfer Out button.</p> 
135.	<p>A message appears reading "EmployeeTransferOut was successful."</p> <p>Click the OK button.</p> 
136.	<p>Click the Restore Pane button.</p> 
137.	<p>Click the Manage Pending Transfers object.</p> 
138.	<p>Right-click the Position row header.</p> 
139.	<p>Click the Reverse Transfer menu.</p> 
140.	<p>A message displays reading "Allocation details are specific to the entity and cannot be copied back. Please enter allocations after reversing the transfer."</p> <p>Click the OK button.</p> 

Step	Action
141.	<p>-Enter/Select values for all the fields Select Source Entity: Generic Entity Select Source Position, for example: EP22000047 Select Target Position, for example: EP22000047 Select Target Entity, for example: 22000_1000001</p> <p><i>[NOTE: Please specify the target entity as the entity from which you transferred out the position. It should be the lowest level member of the entity. Enter a valid value e.g. "22000_1000001".]</i></p> <p>Enter the desired information into the Select Target Entity field. Enter "22000_1000001".</p>
142.	<p>Click the Transfer button.</p> 



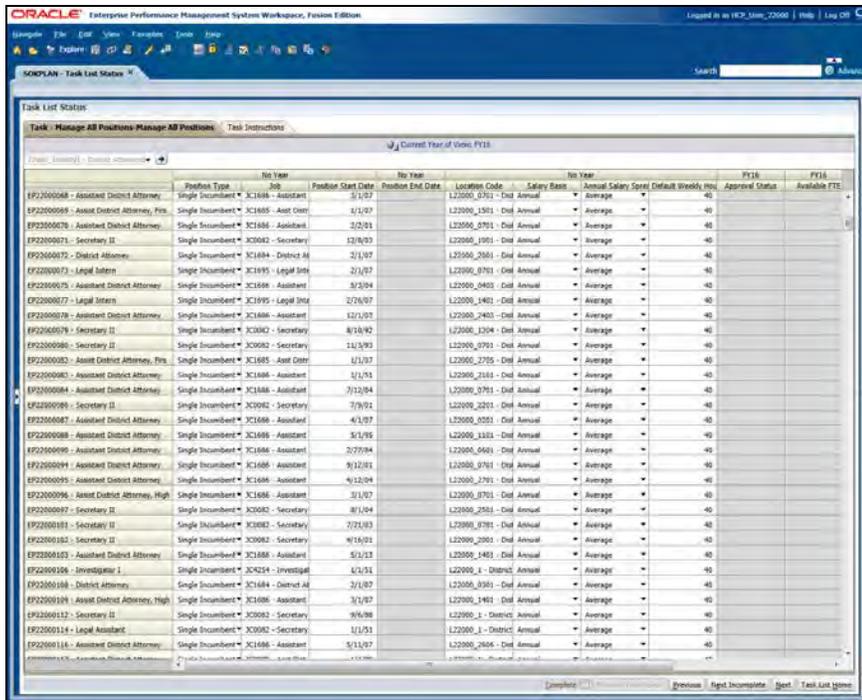
Step	Action
143.	<i>The selected Employee/Position transfer has been reversed</i>

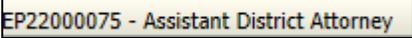
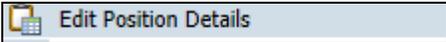


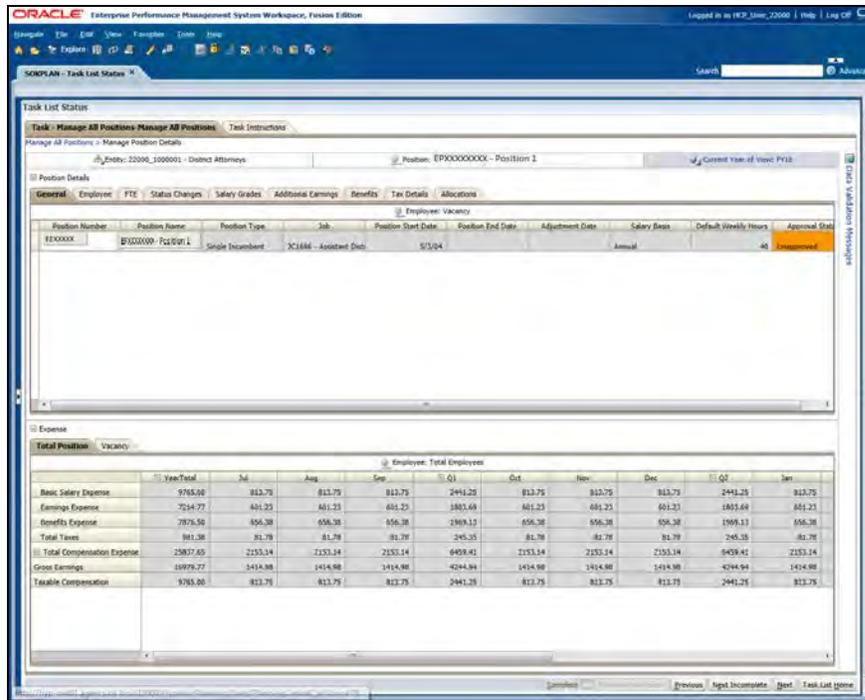
Step	Action
144.	Click the Manage All Positions object. Manage All Positions
145.	Click the Collapse Pane button. 

	Position Type	Job	Position Start Date	Position End Date	Location Code	Salary Base	Annual Salary Spgs	Default Weekly Hrs	FY16 Approved Status	FY16 Available FTE
EP22000003	Single Incumbent	X19203 - Data Proc	5/1/15		L22000_1 - District	Annual	Average	40		
EP22000014	Single Incumbent	X19201 - Payroll Clk	5/13/94		L22000_1 - District	Annual	Average	40		
EP22000015	Single Incumbent	X19170 - Grant Proj	5/13/94		L22000_3 - District	Annual	Average	40		
EP22000037	Single Incumbent	X19205 - Data Proc	5/13/94		L22000_3 - District	Annual	Average	40		
EP22000040	Single Incumbent	X19082 - Secretary	4/1/07		L22000_2501 - Dist Annual	Average	40			
EP22000041	Single Incumbent	X19084 - Assistant	10/20/06		L22000_1401 - Dist Annual	Average	40			
EP22000042	Single Incumbent	X19084 - Assistant	1/6/03		L22000_1201 - Dist Annual	Average	40			
EP22000042	Single Incumbent	X19082 - Secretary	2/2/07		L22000_0701 - Dist Annual	Average	40			
EP22000043	Single Incumbent	X19082 - Secretary	12/1/11		L22000_0601 - Dist Annual	Average	40			
EP22000044	Single Incumbent	X18485 - Asst Dist	12/1/07		L22000_0404 - Dist Annual	Average	40			
EP22000045	Single Incumbent	X19082 - Secretary	9/13/04		L22000_2701 - Dist Annual	Average	40			
EP22000046	Single Incumbent	X18486 - Assistant	3/1/07		L22000_1201 - Dist Annual	Average	40			
EP22000047	Single Incumbent	X18486 - Assistant	3/1/07		L22000_1401 - Dist Annual	Average	40			
EP22000048	Single Incumbent	X18486 - Assistant	6/14/04		L22000_1401 - Dist Annual	Average	40			
EP22000050	Single Incumbent	X19083 - Secretary	11/15/01		L22000_1401 - Dist Annual	Average	40			
EP22000052	Single Incumbent	X18486 - Assistant	9/1/06		L22000_0502 - Dist Annual	Average	40			
EP22000054	Single Incumbent	X19082 - Secretary	5/27/13		L22000_1401 - Dist Annual	Average	40			
EP22000055	Single Incumbent	X18485 - Asst Dist	12/1/11		L22000_2501 - Dist Annual	Average	40			
EP22000056	Single Incumbent	X19082 - Secretary	12/17/01		L22000_0701 - Dist Annual	Average	40			
EP22000057	Single Incumbent	X18486 - Assistant	4/1/07		L22000_2504 - Dist Annual	Average	40			
EP22000058	Single Incumbent	X19254 - Investigator I	3/21/05		L22000_1 - District	Annual	Average	40		
EP22000059	Single Incumbent	X18486 - Assistant	4/1/12		L22000_0803 - Dist Annual	Average	40			
EP22000060	Single Incumbent	X18486 - Assistant	2/14/13		L22000_1401 - Dist Annual	Average	40			
EP22000062	Single Incumbent	X19254 - Investigator I	1/1/11		L22000_3 - District	Annual	Average	40		
EP22000063	Single Incumbent	X19470 - RealEstateOfficer	8/1/08		L22000_0901 - Dist Annual	Average	40			
EP22000066	Single Incumbent	X19082 - Secretary	3/1/07		L22000_1401 - Dist Annual	Average	40			
EP22000067	Single Incumbent	X18486 - Assistant	7/28/03		L22000_2303 - Dist Annual	Average	40			
EP22000068	Single Incumbent	X18486 - Assistant	3/1/07		L22000_0703 - Dist Annual	Average	40			
EP22000069	Single Incumbent	X18485 - Asst Dist	1/1/07		L22000_1201 - Dist Annual	Average	40			
EP22000070	Single Incumbent	X18486 - Assistant	2/2/01		L22000_0701 - Dist Annual	Average	40			
EP22000071	Single Incumbent	X19082 - Secretary	12/8/03		L22000_1001 - Dist Annual	Average	40			

Step	Action
146.	<p><i>Use Vertical Scroll Bar to scroll to the desired position</i></p> <p><i>E.g.:</i></p> <p><i>EP22000075</i></p> 



Step	Action
147.	Right-click the Position object. 
148.	Click the Edit Position Details menu. 
149.	Navigate to the Row Header in the bottom form under the "Total Position" tab Right-click the Row Header object. 
150.	Click the Calculate Compensation Expense menu. 
151.	A message displays reading: "EmpDistElmCost was successful." Click the OK button. 



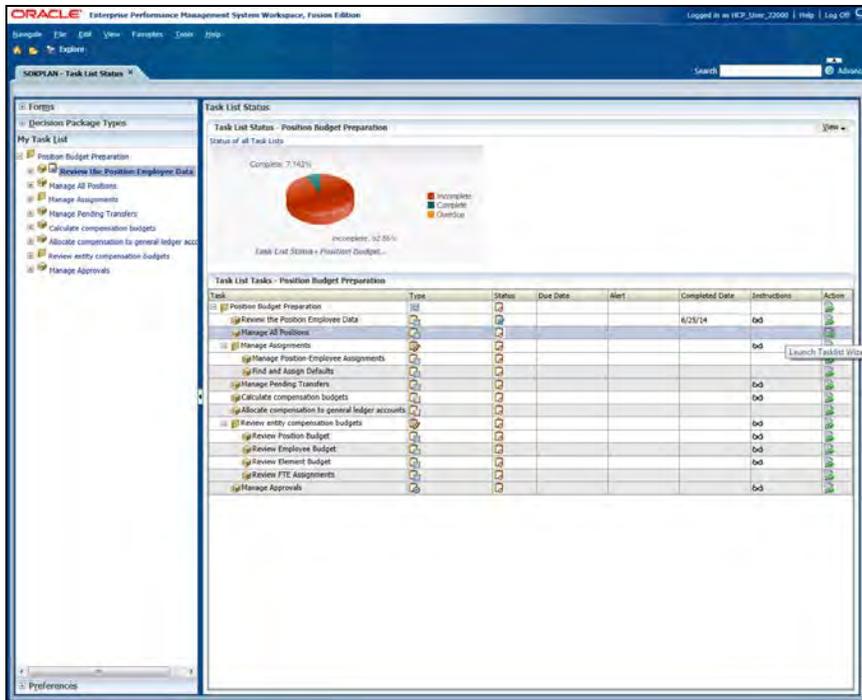
Step	Action
152.	<i>Review Total Compensation Expenses</i>
153.	End of Procedure.

3.12 - Add a new Position

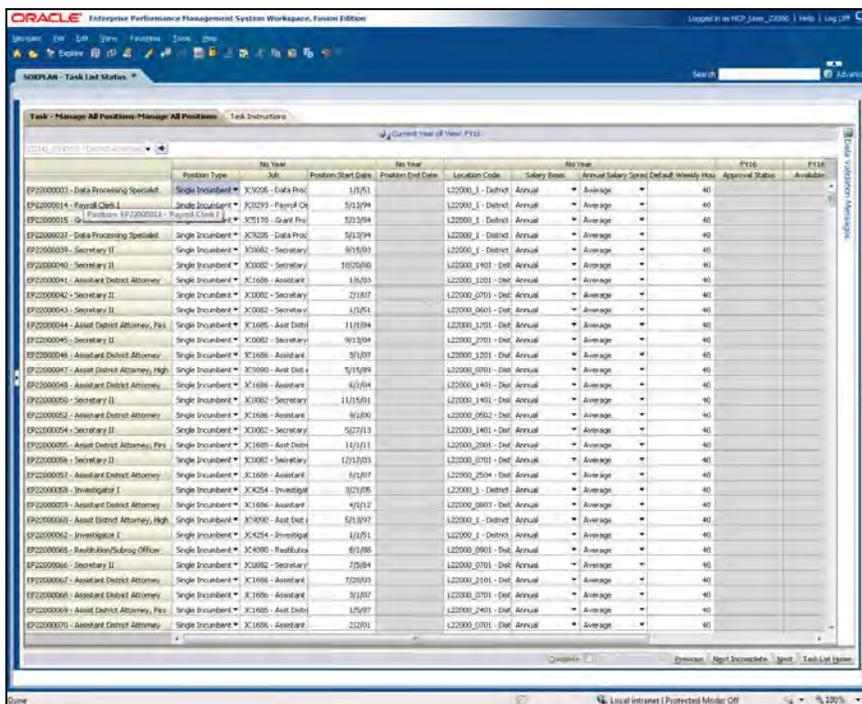
In this topic you will add a new position.

The new position will be reviewed to verify successful addition of position.

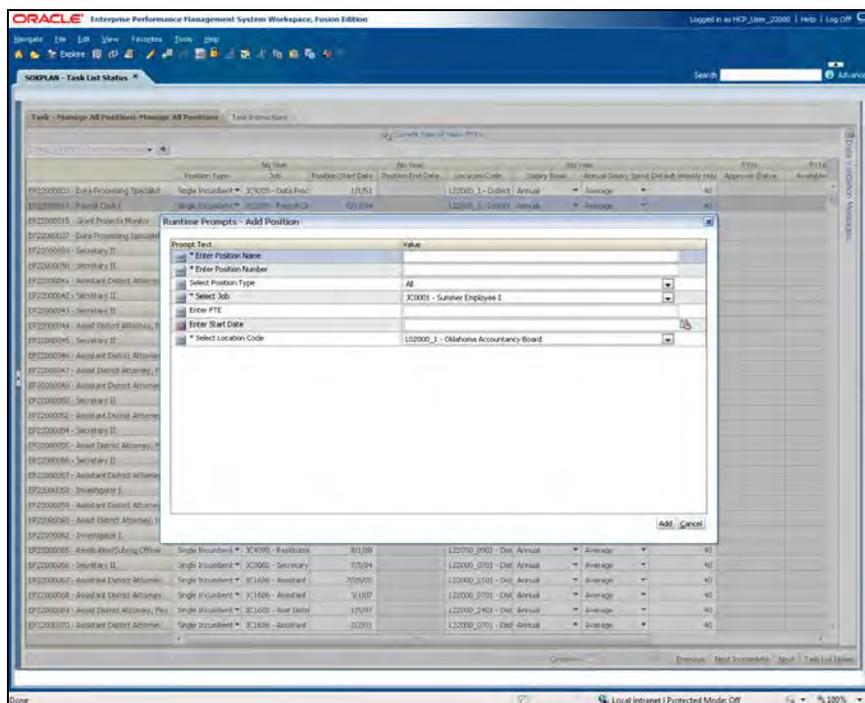
Procedure



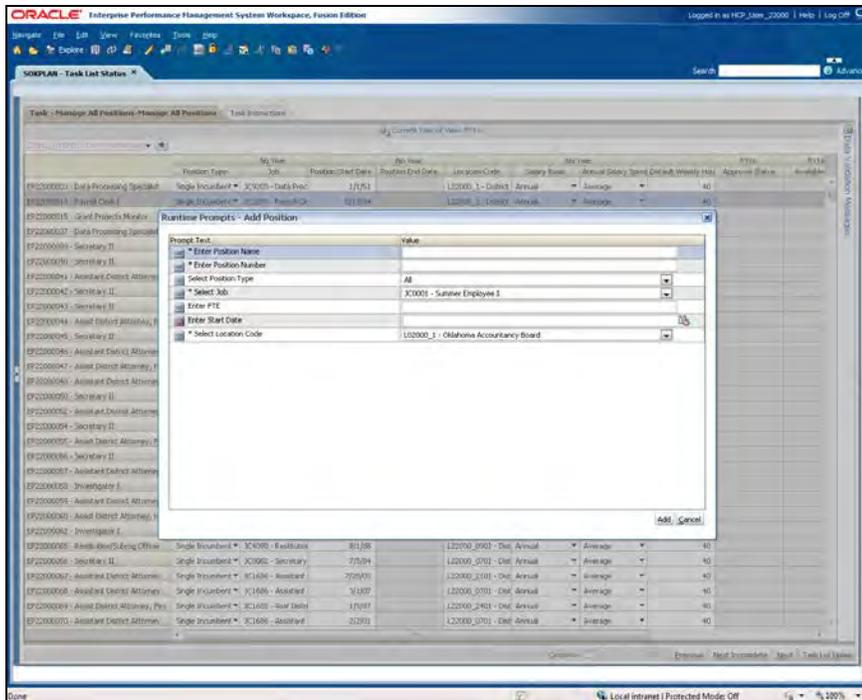
Step	Action
1.	<p>Navigate to the "Manage All Positions" Task</p> <p>Click the Manage All Positions Action button.</p> 



Step	Action
2.	<p><i>Add a New Position</i></p> <p><i>-Right-click any of the row headers in the form</i></p> <p><i>E.g.:</i></p> <p>Right-click the EP22000014 - Payroll Clerk I object.</p> <p>EP22000014 - Payroll Clerk I</p>
3.	<p>Click the Add Position menu.</p> <p>Add Position</p>

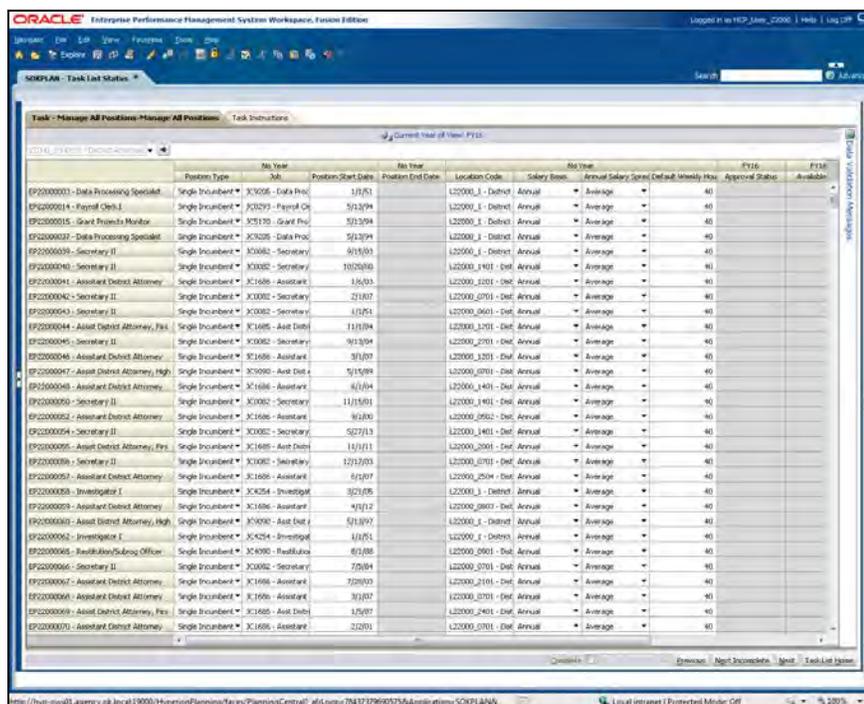


Step	Action
4.	<p><i>Provide Position Details</i></p> <p><i>-Enter/Select values for all the fields</i></p> <p><i>Enter Position Name: for example: Lead</i></p> <p><i>Enter Position Number: for example: EP220001</i></p> <p><i>Select Position Type: for example: Single Incumbent</i></p> <p><i>Select Job: for example: JC0006</i></p> <p><i>Enter FTE: for example: 1</i></p> <p><i>Enter Start Date: for example: 7/1/15</i></p>

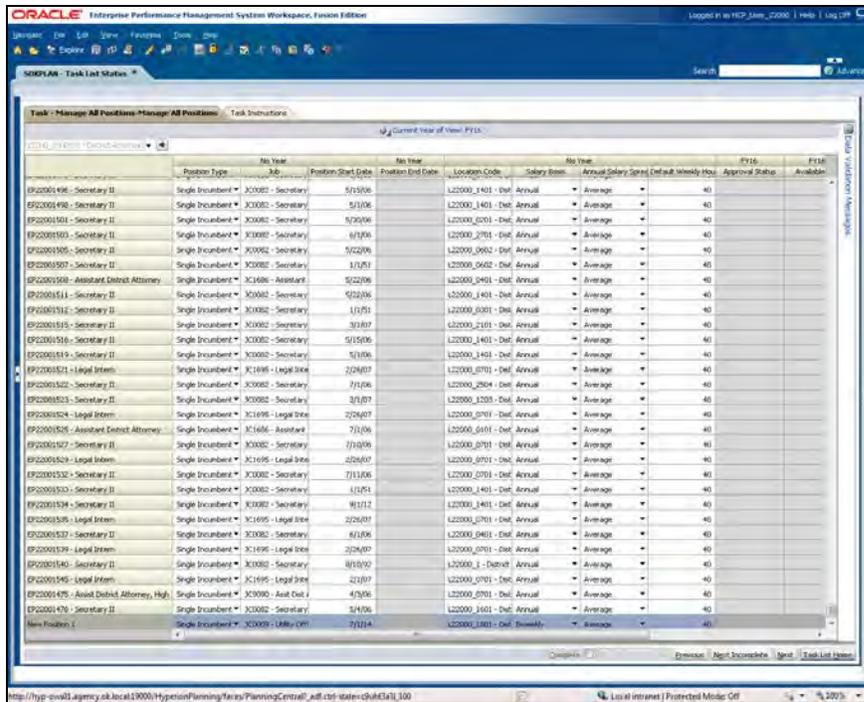


Step	Action
5.	Enter the desired information into the *Enter Position Name field. Enter " Lead ".
6.	Enter the desired information into the *Enter Position Number field. Enter " EP220001 ".
7.	Click the Select Position Type list.
8.	Click the Single Incumbent list item.
9.	Click the *Select Job list.
10.	Click the JC0009 - Utility Office Worker list item.
11.	Enter the desired information into the Enter FTE field. Enter " 1 ".
12.	Enter the desired information into the Enter Start Date field. Enter " 7/1/14 ".

Step	Action
14.	Click the L22000_1801 - District Attorney Office list.
15.	Click the Add button. 
16.	A message appears reading: "AddNewPosition was successful" Click the OK button. 



Step	Action
17.	Use the Scroll Bar to scroll to the bottom of the form and review the newly created position 
18.	<i>Review the newly created position</i>



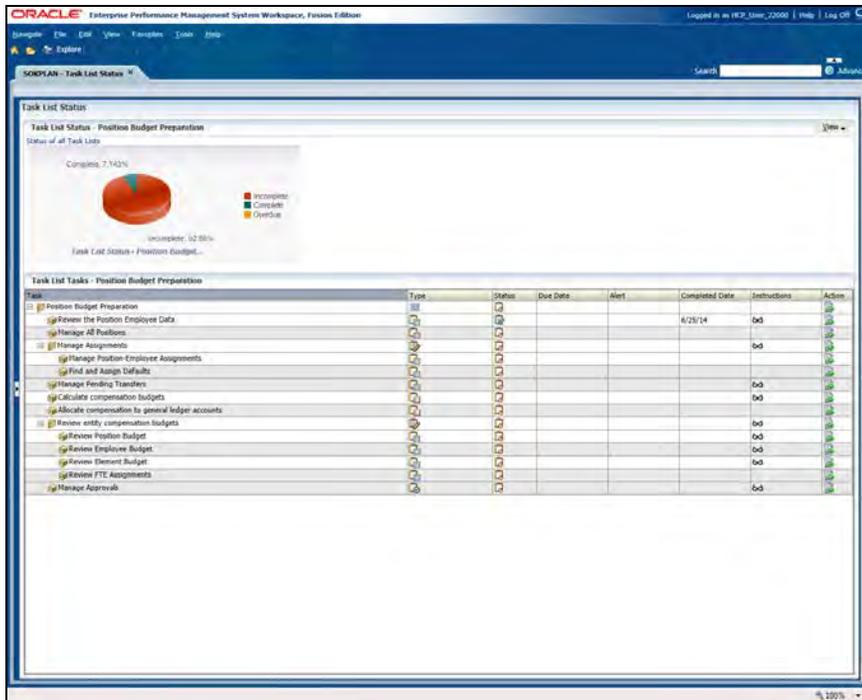
Step	Action
19.	Click the Task List Home button. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Task List Home</div>
20.	End of Procedure.

3.13 - Copy Position Data

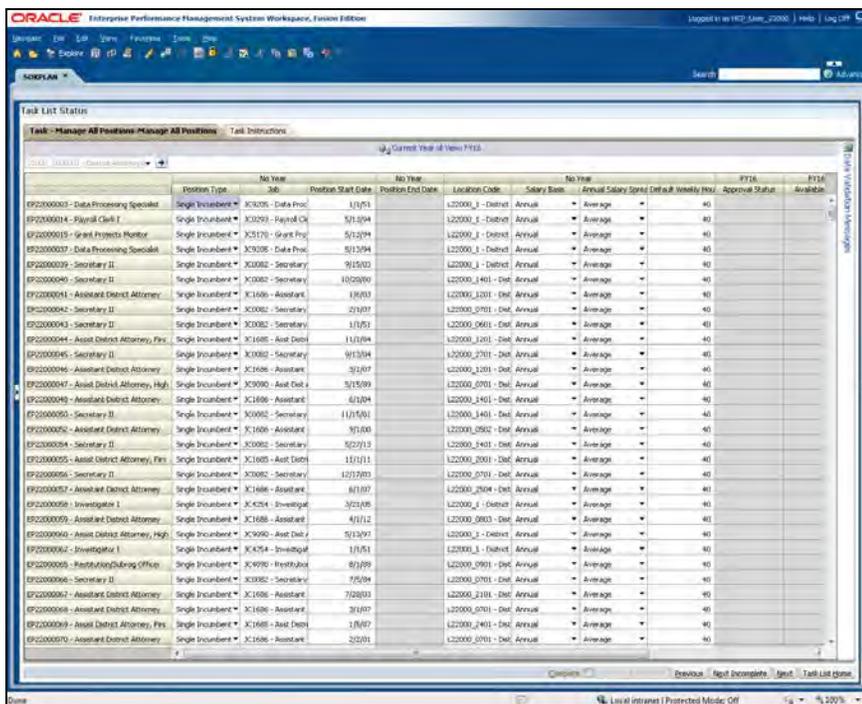
In this topic you will successfully finish this script if the copy position business rule gives a success message.

The copied data can be reviewed successfully.

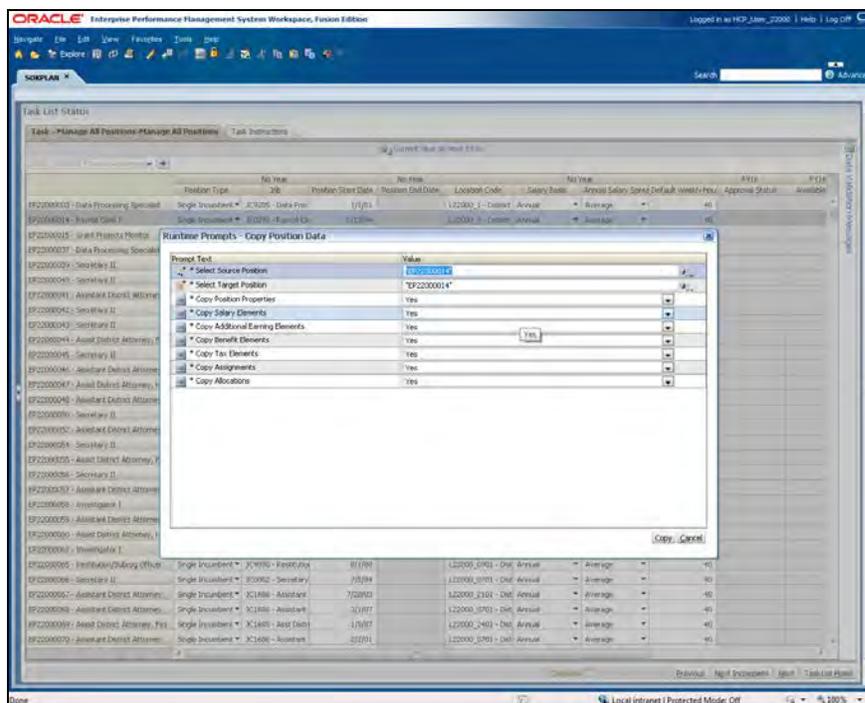
Procedure



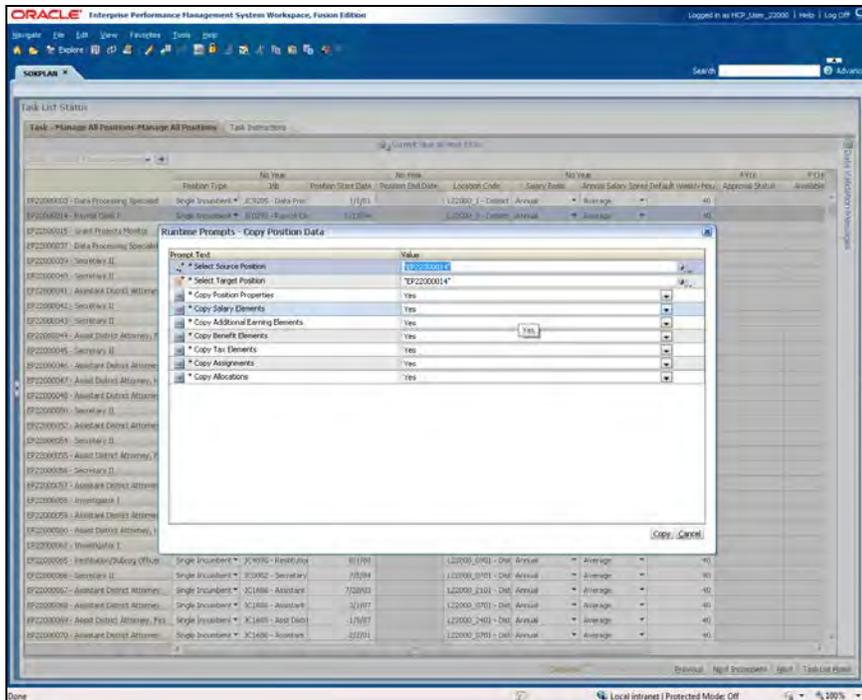
Step	Action
1.	<p>Navigate to the "Manage All Positions" Task</p> <p>Click the Manage All Positions Action button.</p> 



Step	Action
2.	<p><i>Copy Position Data</i></p> <p><i>-Right-click anyone of the row headers in the form</i></p> <p><i>E.g.:</i></p> <p>Right-click the EP22000014 - Payroll Clerk I object.</p> <p>EP22000014 - Payroll Clerk I</p>
3.	<p>Click the Copy Position Data menu.</p> <p>Copy Position Data</p>



Step	Action
4.	<p><i>Provide Position Details</i></p> <p><i>-Select a value in the "Select Source Position": for example: EP22000173</i></p> <p><i>-Select a value in the "Select Target Position": for example: EP22000172</i></p> <p><i>-Select "Yes" for Copy Position Properties, Copy Salary Elements, Copy Additional Earning Elements, Copy Benefits Elements, Copy Tax Elements, Copy Assignment Elements, Copy Allocation Elements</i></p>



Step	Action
5.	Enter the desired information into the *Select Source Position field. Enter "EP22000014" .
6.	Choose a position that is within the same department Enter the desired information into the *Select Target Position field. Enter "EP22000072" .
7.	Click the Copy button. 
8.	A message appears reading: <i>"CopyPosition" was successful</i> Click the OK button. 

ORACLE Enterprise Performance Management System Workspace, Fusion Edition

Task List Status

Task - Manage All Positions Manage All Positions Task Instructions

Current Year of View FY15

	No Year	No Year	No Year	No Year	No Year	No Year	P114	P114		
	Position Type	Job	Position Start Date	Position End Date	Location Code	Salary Basis	Annual Salary Sprd Defn	Unleady Hrs	Approval Status	Available
EP22000003	Data Processing Specialist	Single Incumbent	X3205 - Data Proc	1/1/03	122000_1 - District	Annual	Average	40		
EP22000014	Payroll Clerk I	Single Incumbent	X3205 - Payroll Clk	5/1/04	122000_1 - District	Annual	Average	40		
EP22000015	Grant Projects Monitor	Single Incumbent	X3170 - Grant Proj	5/1/04	122000_1 - District	Annual	Average	40		
EP22000017	Data Processing Specialist	Single Incumbent	X3205 - Data Proc	5/1/04	122000_1 - District	Annual	Average	40		
EP22000019	Secretary II	Single Incumbent	X3002 - Secretary	9/15/03	122000_1 - District	Annual	Average	40		
EP22000014	Assistant District Attorney	Single Incumbent	X1606 - Assistant	1/1/03	122000_1201 - Dist	Annual	Average	40		
EP22000042	Secretary II	Single Incumbent	X3002 - Secretary	2/1/07	122000_0701 - Dist	Annual	Average	40		
EP22000043	Secretary II	Single Incumbent	X3002 - Secretary	1/1/03	122000_0601 - Dist	Annual	Average	40		
EP22000044	Asst District Attorney, Fin	Single Incumbent	X1605 - Asst Dist	1/1/04	122000_1201 - Dist	Annual	Average	40		
EP22000045	Secretary II	Single Incumbent	X3002 - Secretary	9/15/04	122000_0701 - Dist	Annual	Average	40		
EP22000046	Assistant District Attorney	Single Incumbent	X1606 - Assistant	3/1/07	122000_1201 - Dist	Annual	Average	40		
EP22000047	Asst District Attorney, High	Single Incumbent	X3000 - Asst Dist	3/15/09	122000_0701 - Dist	Annual	Average	40		
EP22000048	Assistant District Attorney	Single Incumbent	X1606 - Assistant	4/1/04	122000_1401 - Dist	Annual	Average	40		
EP22000050	Secretary II	Single Incumbent	X3002 - Secretary	11/15/01	122000_1401 - Dist	Annual	Average	40		
EP22000052	Assistant District Attorney	Single Incumbent	X1606 - Assistant	3/1/00	122000_2502 - Dist	Annual	Average	40		
EP22000054	Secretary II	Single Incumbent	X3002 - Secretary	5/27/13	122000_1401 - Dist	Annual	Average	40		
EP22000055	Asst District Attorney, Fin	Single Incumbent	X1605 - Asst Dist	11/1/11	122000_2001 - Dist	Annual	Average	40		
EP22000056	Secretary II	Single Incumbent	X3002 - Secretary	12/17/03	122000_0701 - Dist	Annual	Average	40		
EP22000057	Assistant District Attorney	Single Incumbent	X1606 - Assistant	8/1/07	122000_2604 - Dist	Annual	Average	40		
EP22000058	Investigator I	Single Incumbent	X4254 - Investigator	3/21/05	122000_1 - District	Annual	Average	40		
EP22000059	Assistant District Attorney	Single Incumbent	X1606 - Assistant	4/1/12	122000_0803 - Dist	Annual	Average	40		
EP22000060	Asst District Attorney, High	Single Incumbent	X3000 - Asst Dist	5/12/03	122000_1 - District	Annual	Average	40		
EP22000062	Investigator I	Single Incumbent	X4254 - Investigator	1/1/01	122000_1 - District	Annual	Average	40		
EP22000065	Recruiting/Outing Officer	Single Incumbent	X4070 - Recruiting	8/3/09	122000_0901 - Dist	Annual	Average	40		
EP22000066	Secretary II	Single Incumbent	X3002 - Secretary	7/5/04	122000_0701 - Dist	Annual	Average	40		
EP22000067	Assistant District Attorney	Single Incumbent	X1606 - Assistant	7/28/03	122000_2101 - Dist	Annual	Average	40		
EP22000068	Assistant District Attorney	Single Incumbent	X1606 - Assistant	3/1/07	122000_0701 - Dist	Annual	Average	40		
EP22000069	Asst District Attorney, Fin	Single Incumbent	X1605 - Asst Dist	1/1/07	122000_2401 - Dist	Annual	Average	40		
EP22000070	Assistant District Attorney	Single Incumbent	X1606 - Assistant	2/2/01	122000_0701 - Dist	Annual	Average	40		

Step	Action
9.	Use the scroll bar to scroll to the position where the data was copied to

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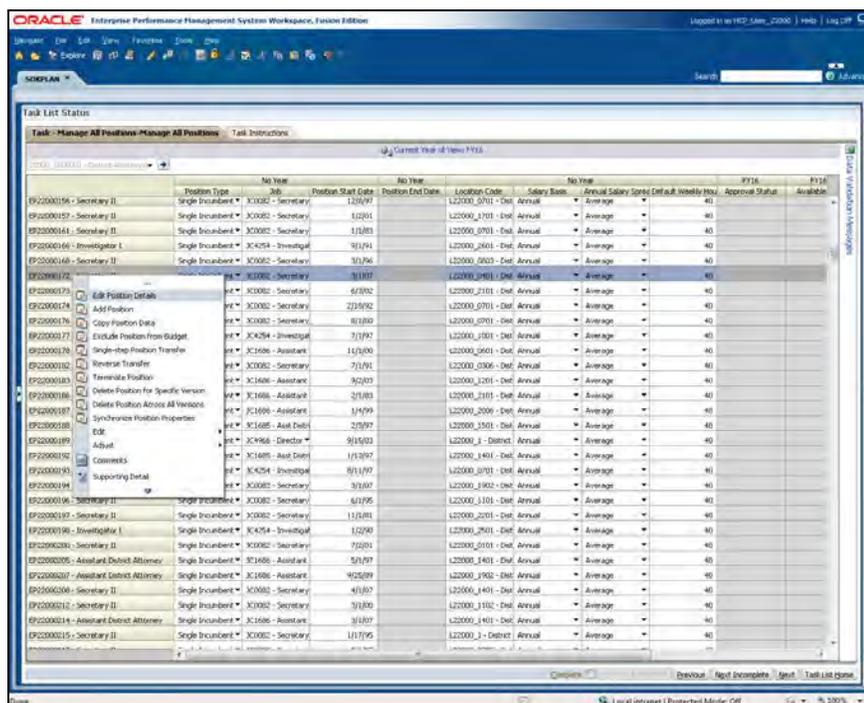
Task List Status

Task - Manage All Positions Manage All Positions Task Instructions

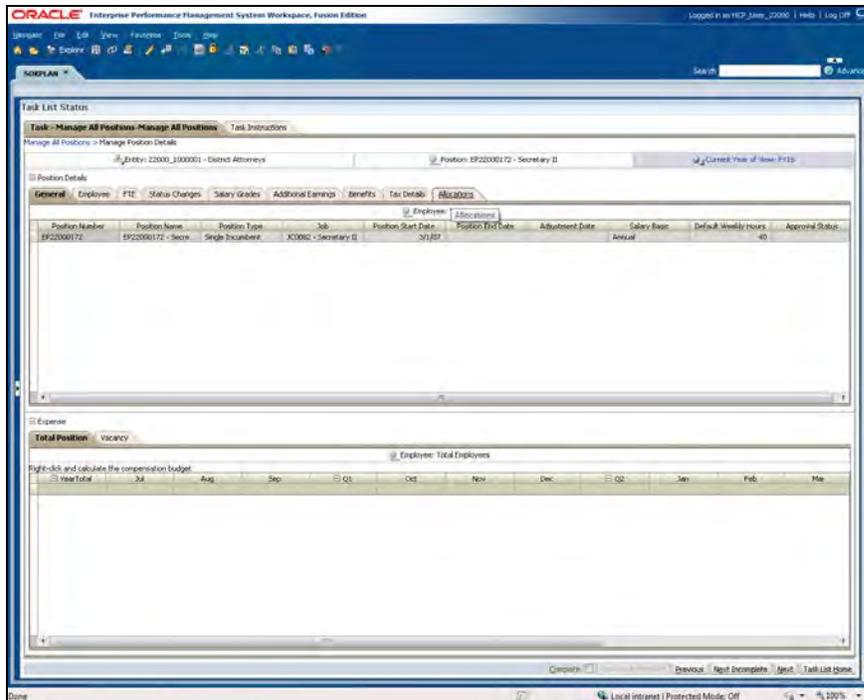
Current Year of View FY15

	No Year	No Year	No Year	No Year	No Year	No Year	P114	P114		
	Position Type	Job	Position Start Date	Position End Date	Location Code	Salary Basis	Annual Salary Sprd Defn	Unleady Hrs	Approval Status	Available
EP22000116	Secretary II	Single Incumbent	X3002 - Secretary	12/26/07	122000_0701 - Dist	Annual	Average	40		
EP22000117	Secretary II	Single Incumbent	X3002 - Secretary	12/26/11	122000_0701 - Dist	Annual	Average	40		
EP22000141	Secretary II	Single Incumbent	X3002 - Secretary	1/1/88	122000_0701 - Dist	Annual	Average	40		
EP22000144	Investigator I	Single Incumbent	X4254 - Investigator	3/1/04	122000_2603 - Dist	Annual	Average	40		
EP22000148	Secretary II	Single Incumbent	X3002 - Secretary	3/1/06	122000_0803 - Dist	Annual	Average	40		
EP22000152	Secretary II	Single Incumbent	X3002 - Secretary	3/1/07	122000_0401 - Dist	Annual	Average	40		
EP22000173	Secretary II	Single Incumbent	X3002 - Secretary	8/2/02	122000_2101 - Dist	Annual	Average	40		
EP22000174	Secretary II	Single Incumbent	X3002 - Secretary	2/15/02	122000_0701 - Dist	Annual	Average	40		
EP22000176	Secretary II	Single Incumbent	X3002 - Secretary	8/1/80	122000_0701 - Dist	Annual	Average	40		
EP22000177	Investigator I	Single Incumbent	X4254 - Investigator	3/1/97	122000_1101 - Dist	Annual	Average	40		
EP22000178	Assistant District Attorney	Single Incumbent	X1606 - Assistant	11/1/00	122000_0601 - Dist	Annual	Average	40		
EP22000182	Secretary II	Single Incumbent	X3002 - Secretary	7/1/91	122000_0306 - Dist	Annual	Average	40		
EP22000183	Assistant District Attorney	Single Incumbent	X1606 - Assistant	3/2/03	122000_1201 - Dist	Annual	Average	40		
EP22000188	Assistant District Attorney	Single Incumbent	X1606 - Assistant	2/1/03	122000_1101 - Dist	Annual	Average	40		
EP22000189	Assistant District Attorney, Fin	Single Incumbent	X1605 - Asst Dist	2/27/07	122000_2000 - Dist	Annual	Average	40		
EP22000189	Director	Single Incumbent	X4964 - Director	9/15/03	122000_1 - District	Annual	Average	40		
EP22000192	Asst District Attorney, Fin	Single Incumbent	X1605 - Asst Dist	1/13/07	122000_1401 - Dist	Annual	Average	40		
EP22000193	Investigator I	Single Incumbent	X4254 - Investigator	9/11/97	122000_0701 - Dist	Annual	Average	40		
EP22000194	Secretary II	Single Incumbent	X3002 - Secretary	3/1/87	122000_1802 - Dist	Annual	Average	40		
EP22000196	Secretary II	Single Incumbent	X3002 - Secretary	4/1/05	122000_1101 - Dist	Annual	Average	40		
EP22000197	Secretary II	Single Incumbent	X3002 - Secretary	11/1/81	122000_2201 - Dist	Annual	Average	40		
EP22000198	Investigator I	Single Incumbent	X4254 - Investigator	12/0/0	122000_2501 - Dist	Annual	Average	40		
EP22000200	Secretary II	Single Incumbent	X3002 - Secretary	7/20/11	122000_0101 - Dist	Annual	Average	40		
EP22000205	Assistant District Attorney	Single Incumbent	X1606 - Assistant	5/1/97	122000_1401 - Dist	Annual	Average	40		
EP22000207	Assistant District Attorney	Single Incumbent	X1606 - Assistant	9/25/99	122000_1902 - Dist	Annual	Average	40		
EP22000208	Secretary II	Single Incumbent	X3002 - Secretary	4/1/07	122000_1401 - Dist	Annual	Average	40		
EP22000212	Secretary II	Single Incumbent	X3002 - Secretary	3/1/80	122000_1102 - Dist	Annual	Average	40		
EP22000214	Assistant District Attorney	Single Incumbent	X1606 - Assistant	3/1/07	122000_1401 - Dist	Annual	Average	40		
EP22000215	Secretary II	Single Incumbent	X3002 - Secretary	11/17/95	122000_1 - District	Annual	Average	40		

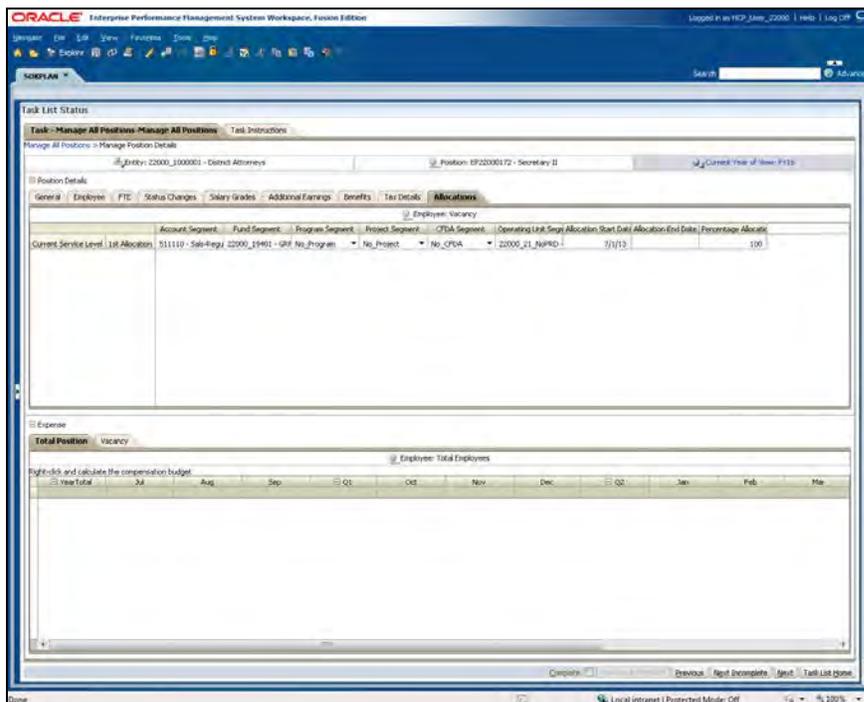
Step	Action
10.	<p><i>E.g.:</i></p> <p>Right-click the EP22000172 - Secretary II object.</p> <p>EP22000172 - Secretary II</p>



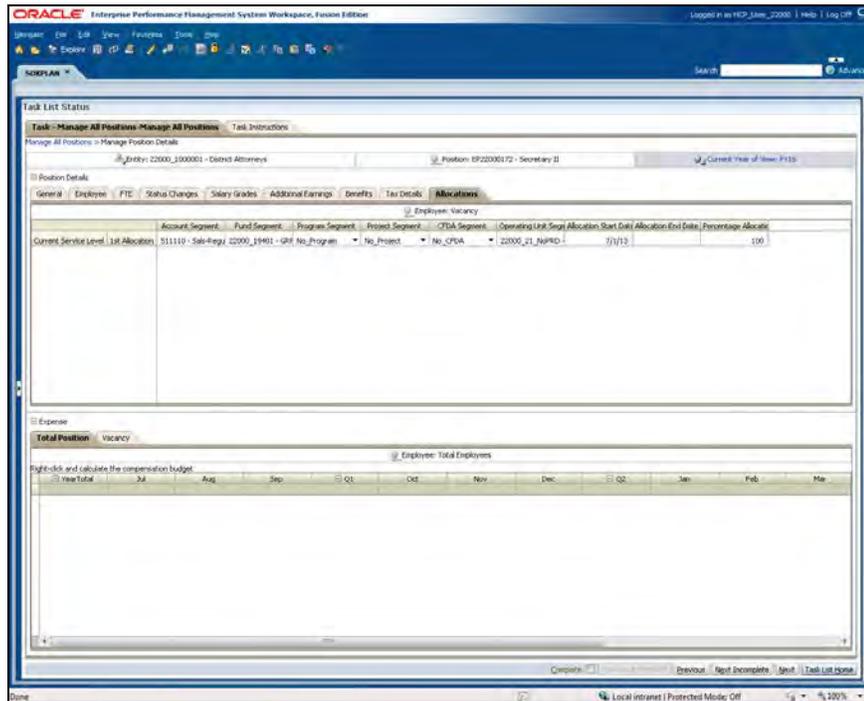
Step	Action
11.	<p>Click the Edit Position Details menu.</p> <p> Edit Position Details</p>



Step	Action
12.	Click the Allocations tab. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Allocations</div>



Step	Action
13.	<p><i>Review that the data was copied over successfully</i></p> <p><i>[NOTE: If there are no allocations to review, go back to the previous step and click the "Tax Details" tab to review that data]</i></p>



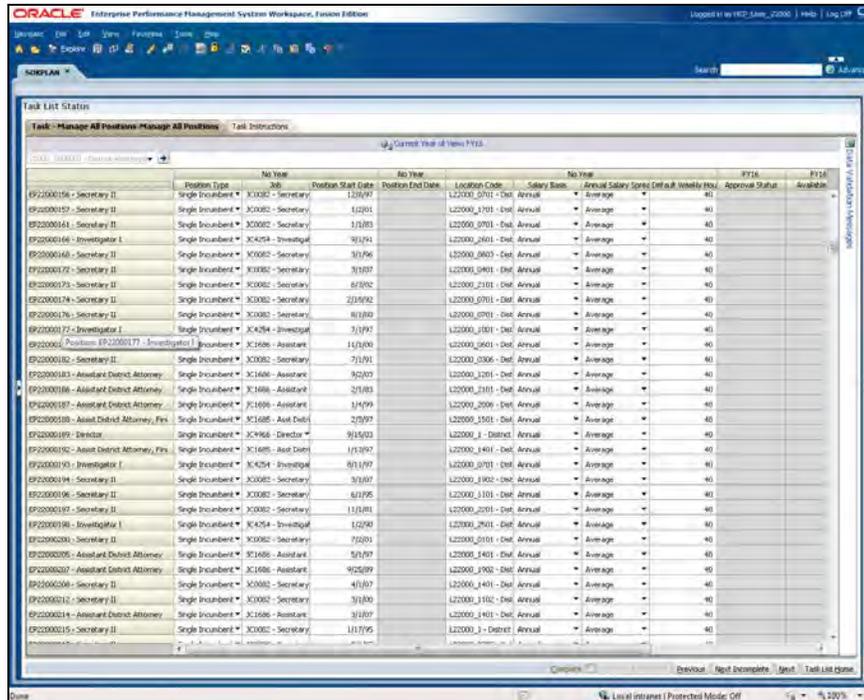
Step	Action
14.	<p>Click the Task List Home button.</p> <p></p>
15.	<p>End of Procedure.</p>

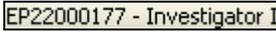
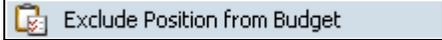
3.14 - Exclude a Position

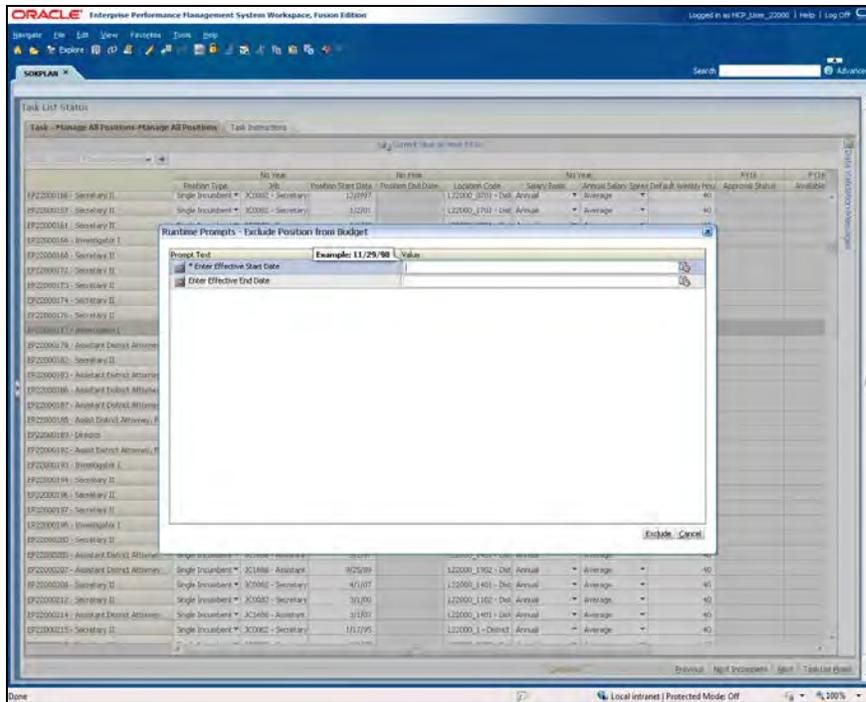
In this topic you will exclude a position from budgetary impact. The business rule “ExcludePos” gives a dialog box at success.

Procedure

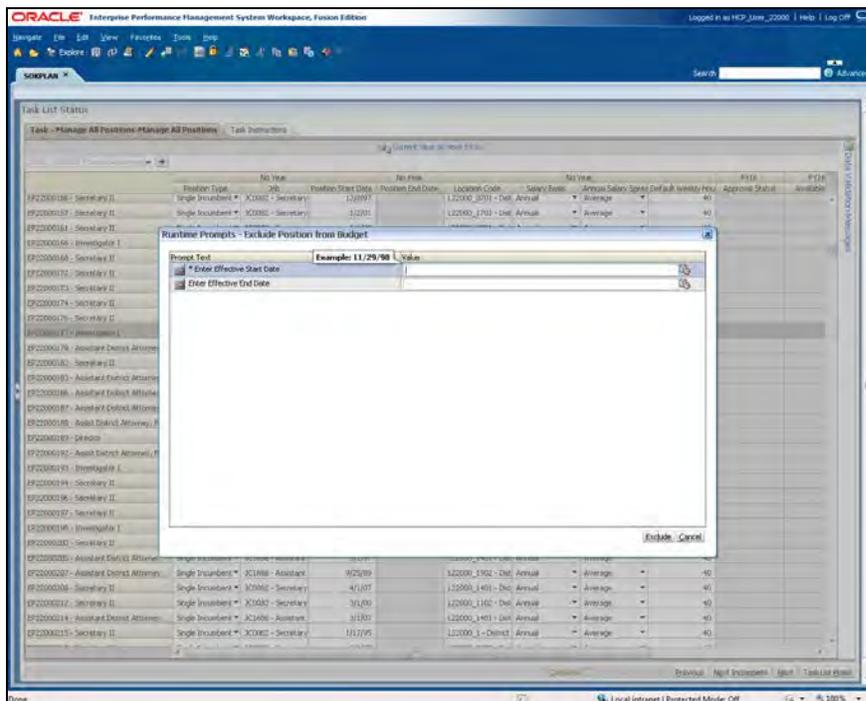
Step	Action
2.	<p>Use the Scroll Bar to navigate to desired position</p> <p>E.g.:</p> <p>EP22000177 - Assistant District Attorney</p> 



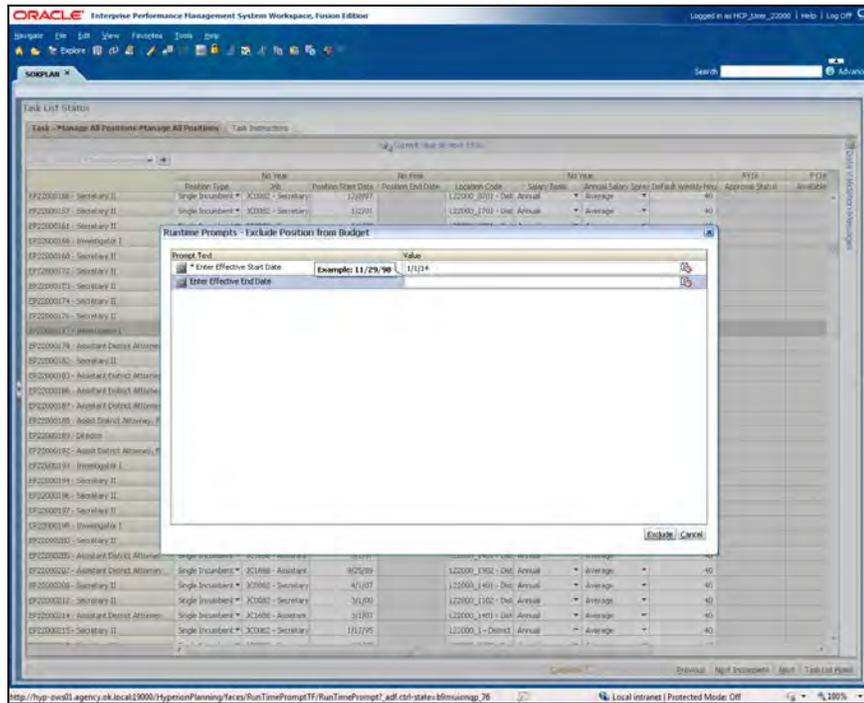
Step	Action
3.	<p>E.g.:</p> <p>Right-click the EP22000177 - Investigator I object.</p> 
4.	<p>Click the Exclude Position from Budget menu.</p> 
5.	<p>A message box appears reading: "Do you want to exclude this position form Budget?"</p> <p>Click the OK button.</p> 



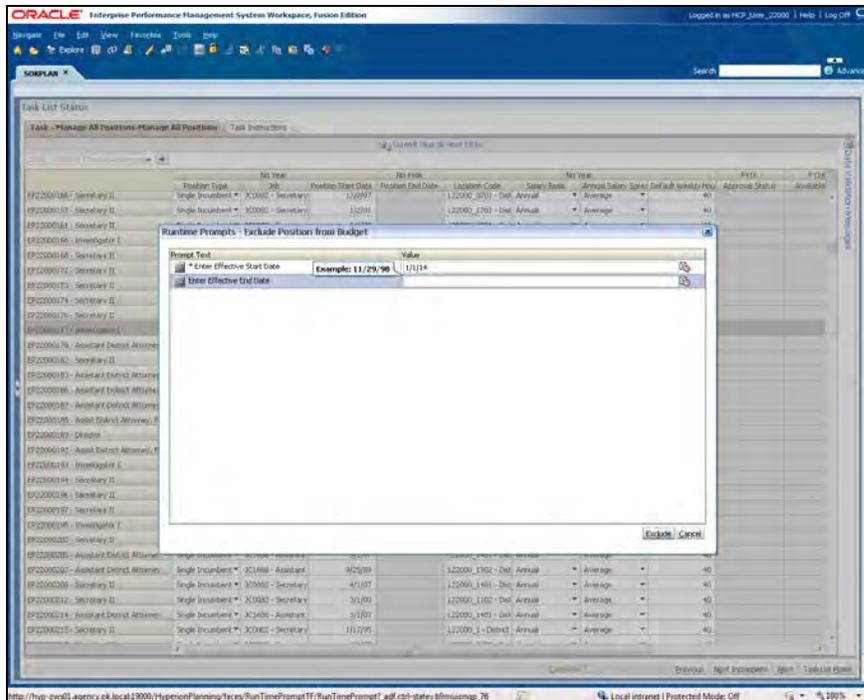
Step	Action
6.	<p><i>Provide Position Details</i></p> <ul style="list-style-type: none"> -Enter/Select a value for "Effective Start Date" field: for example: 1/1/15 -Enter/Select a value for "Effective End Date" field (optional)

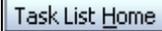


Step	Action
7.	Enter the desired information into the *Enter Effective Start Date field. Enter "1/1/14" .



Step	Action
8.	Leave the <i>Enter Effective End Date</i> field blank

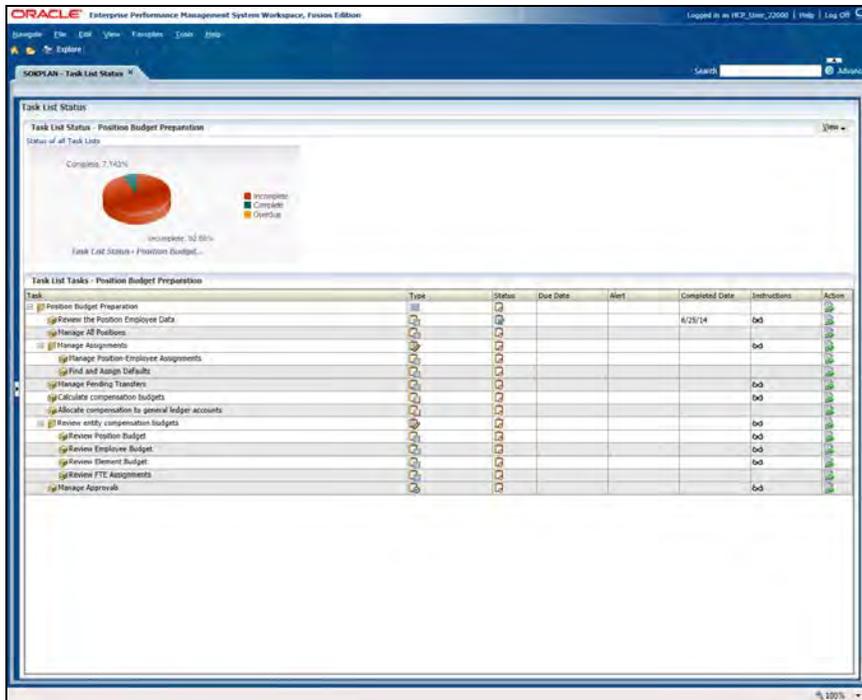


Step	Action
9.	Click the Exclude button. 
10.	A message appears reading "ExcludePos was successful" Click the OK button. 
11.	Click the Task List Home button. 
12.	End of Procedure.

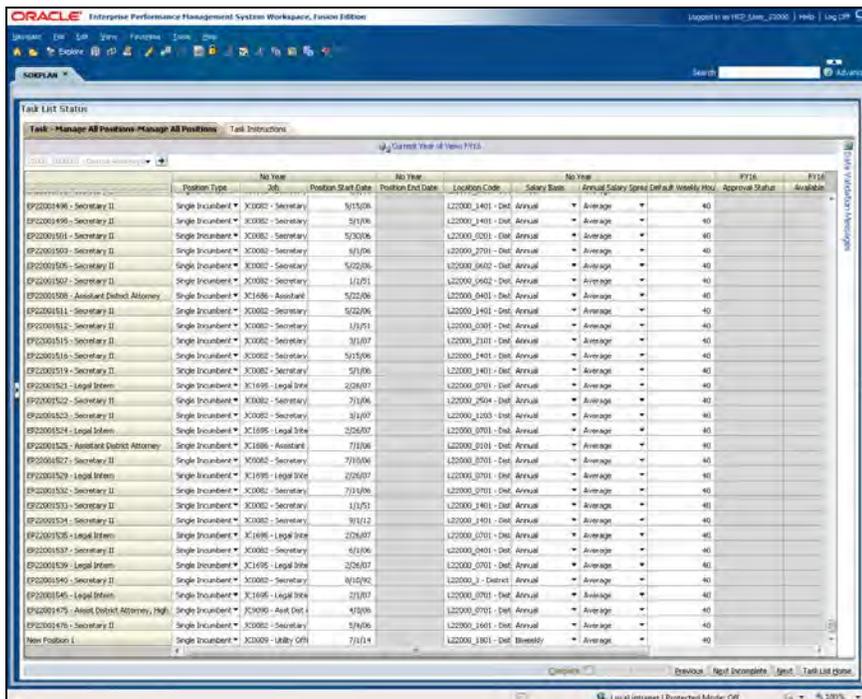
3.15 - Transfer a Position

In this topic you will transfer the newly created position to a different department. Tester can review the target department to verify the position was successfully transferred.

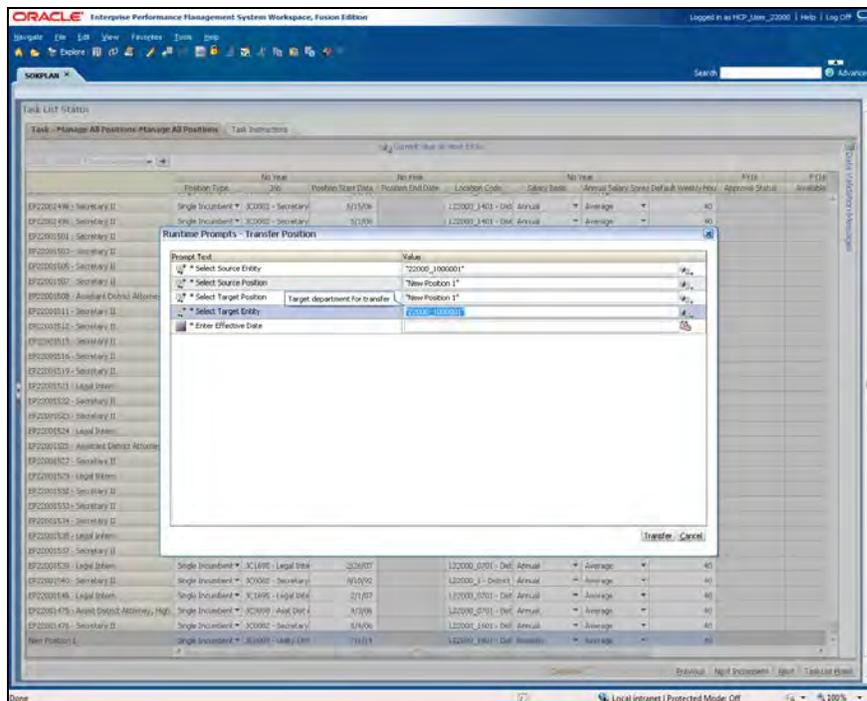
Procedure



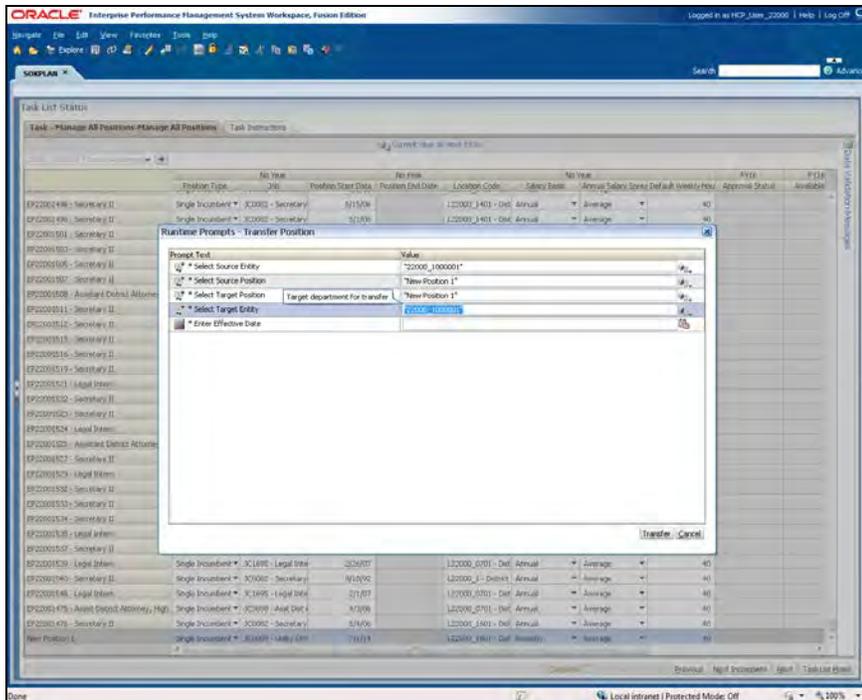
Step	Action
1.	Click the Manage All Positions Action button.



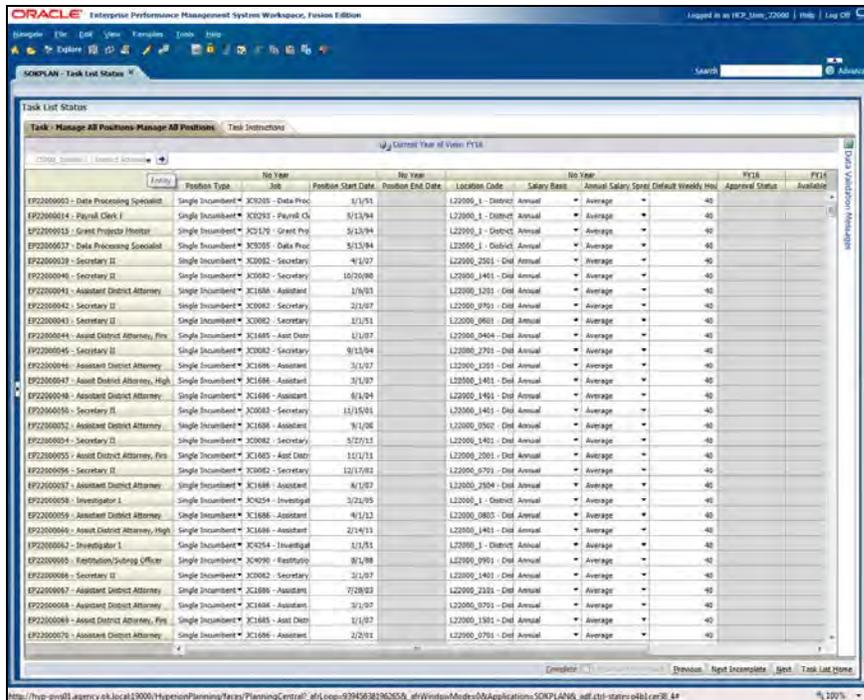
Step	Action
2.	<p><i>Right-click any of the new positions created</i></p> <p>Right-click the New Position 1 object.</p> 
3.	<p>Click the Single-step Position Transfer menu.</p> 
4.	<p><i>A message box appears reading: "Do you want to transfer out this position?"</i></p> <p>Click the OK button.</p> 

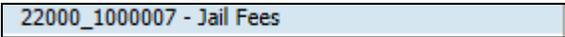


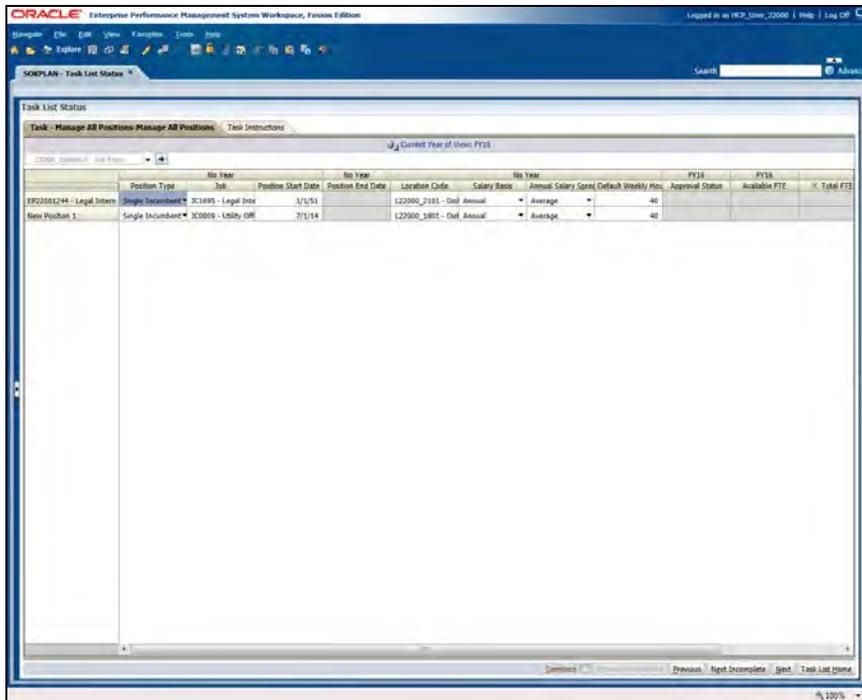
Step	Action
5.	<p><i>Provide the Position Transfer Details</i></p> <p><i>-Enter/Select values for all the fields</i></p> <p><i>Select Source Entity: for example: 22000_1000001</i></p> <p><i>Select Source Position: for example: New Position 1</i></p> <p><i>Select Target Position: for example: New Position 1</i></p> <p><i>Select Target Entity: for example: 22000_1000007</i></p> <p><i>Enter Effective Date: for example: 1/1/15</i></p>



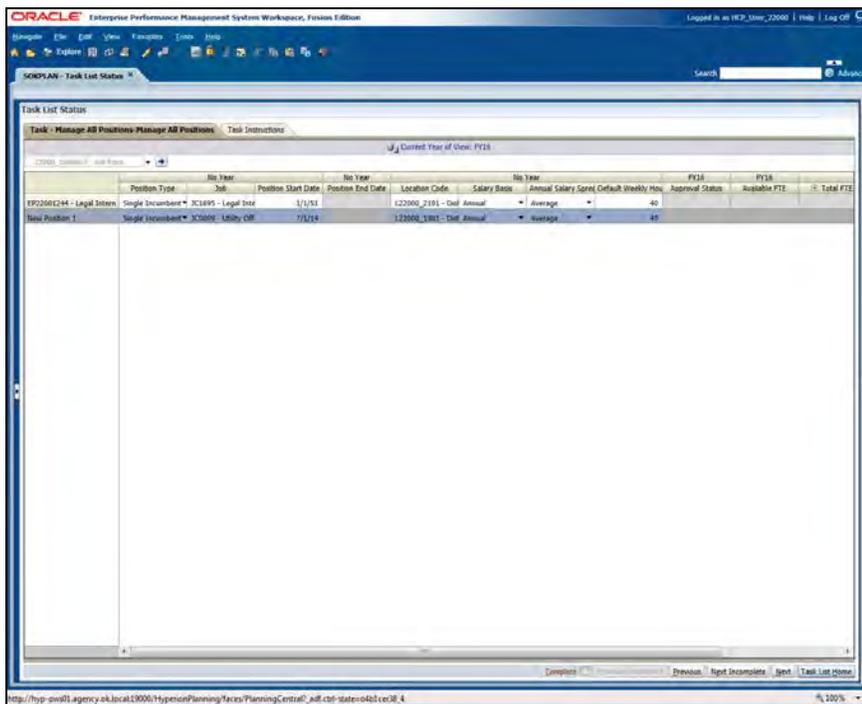
Step	Action
6.	Enter the desired information into the *Select Target Entity field. Enter "22000_100007" .
7.	<i>Enter Effective Date that is later than the Start Date</i> Enter the desired information into the *Enter Effective Date field. Enter "1/1/15" .
8.	Click the Transfer button. 
9.	A message box appears reading <i>"EmployeeTransfer was successful"</i> Click the OK button. 

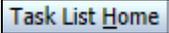


Step	Action
10.	<p>Check that the Position Transferred</p> <p>Click the Entity dropdown button to activate the menu.</p> 
11.	<p>-Select the Target Entity for which the position was transferred to: for example: 22000_1000007</p> <p>Click the 22000_1000007 cell.</p> 
12.	<p>Click the Go button.</p> 



Step	Action
13.	<i>The New Position 1 is found in the list of positions</i>
	New Position 1



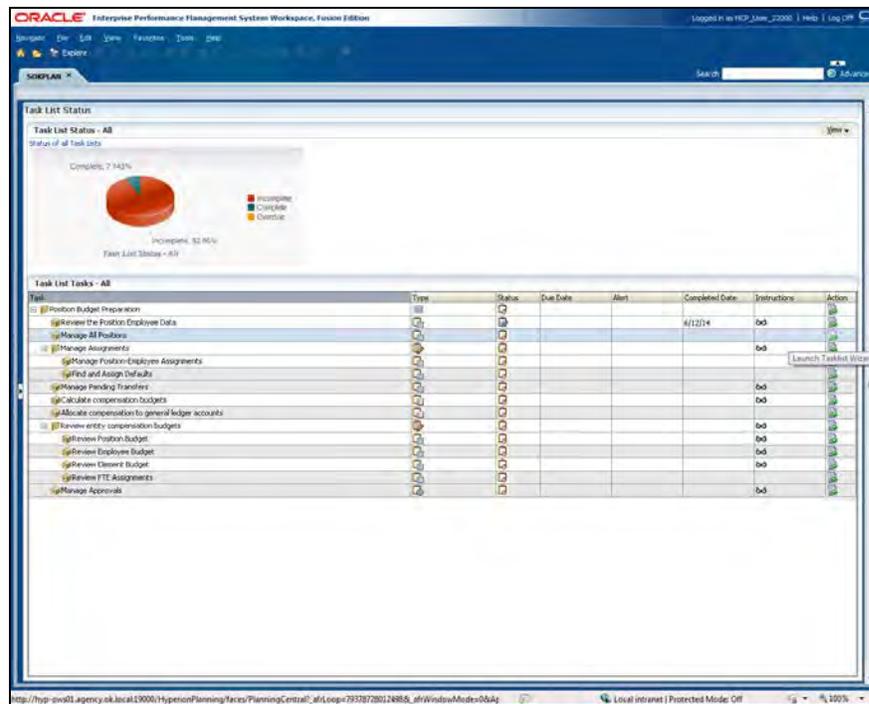
Step	Action
14.	Click the Task List Home button. 
15.	End of Procedure.

3.16 - Reverse Transfer

In this topic you will reverse the previously transferred position to send it back to its original department.

The original department will be reviewed to verify the reverse transfer was successful.

Procedure



Step	Action
1.	Click the Manage All Positions Action button. 

ORACLE Enterprise Performance Management System Workspace, Fusion Edition

Task List Status

Task - Manage All Positions Manage All Positions Task Instructions

Current Year of View FY12

Position ID	Position Type	Job	Position Start Date	No Year	Location Code	Salary Basis	No Year	Annual Salary	Spine	Default	Weekly	Hour	Approval Status	FY14	FY14
EP22000007	Data Processing Specialist	XC3275 - Data Proc	1/1/11		L22000_1 - District	Annual	Average						40		
EP22000014	Payroll Clerk I	XC3291 - Payroll Clk	5/1/04		L22000_1 - District	Annual	Average						40		
EP22000015	Grant Projects Monitor	XC3170 - Grant Proj	5/1/04		L22000_1 - District	Annual	Average						40		
EP22000037	Data Processing Specialist	XC3295 - Data Proc	5/1/04		L22000_1 - District	Annual	Average						40		
EP22000039	Secretary II	XC3082 - Secretary	9/15/03		L22000_1 - District	Annual	Average						40		
EP22000040	Secretary II	XC3082 - Secretary	10/29/00		L22000_1401 - Det	Annual	Average						40		
EP22000041	Assistant District Attorney	XC1606 - Assst Att	1/9/03		L22000_1201 - Det	Annual	Average						40		
EP22000042	Secretary II	XC3082 - Secretary	2/9/07		L22000_0701 - Det	Annual	Average						40		
EP22000043	Secretary II	XC3082 - Secretary	1/1/03		L22000_0601 - Det	Annual	Average						40		
EP22000044	Asst District Attorney, Fin	XC1606 - Assst Det	11/1/04		L22000_1201 - Det	Annual	Average						40		
EP22000045	Secretary II	XC3082 - Secretary	9/13/04		L22000_1201 - Det	Annual	Average						40		
EP22000046	Assistant District Attorney	XC1606 - Assst Att	3/1/07		L22000_1201 - Det	Annual	Average						40		
EP22000047	Asst District Attorney, High	XC3090 - Assst Det	5/15/09		L22000_0701 - Det	Annual	Average						40		
EP22000049	Assistant District Attorney	XC1606 - Assst Att	4/1/04		L22000_1401 - Det	Annual	Average						40		
EP22000050	Secretary II	XC3082 - Secretary	11/15/01		L22000_1401 - Det	Annual	Average						40		
EP22000052	Assistant District Attorney	XC1606 - Assst Att	3/1/00		L22000_2502 - Det	Annual	Average						40		
EP22000054	Secretary II	XC3082 - Secretary	5/27/13		L22000_1401 - Det	Annual	Average						40		
EP22000055	Asst District Attorney, Fin	XC1606 - Assst Det	11/1/11		L22000_2001 - Det	Annual	Average						40		
EP22000056	Secretary II	XC3082 - Secretary	12/17/03		L22000_0701 - Det	Annual	Average						40		
EP22000057	Assistant District Attorney	XC1606 - Assst Att	8/1/07		L22000_2504 - Det	Annual	Average						40		
EP22000058	Investigator I	XC4254 - Investigator	3/21/05		L22000_1401 - Det	Annual	Average						40		
EP22000059	Assistant District Attorney	XC1606 - Assst Att	4/1/12		L22000_0801 - Det	Annual	Average						40		
EP22000060	Asst District Attorney, High	XC3090 - Assst Det	5/13/03		L22000_1 - District	Annual	Average						40		
EP22000062	Investigator I	XC4254 - Investigator	1/1/11		L22000_1 - District	Annual	Average						40		
EP22000065	Rehabilitation/Drug Office	XC4970 - Rehabilitat	8/3/09		L22000_0901 - Det	Annual	Average						40		
EP22000066	Secretary II	XC3082 - Secretary	7/5/04		L22000_0701 - Det	Annual	Average						40		
EP22000067	Assistant District Attorney	XC1606 - Assst Att	7/28/03		L22000_1201 - Det	Annual	Average						40		
EP22000068	Assistant District Attorney	XC1606 - Assst Att	3/1/07		L22000_0701 - Det	Annual	Average						40		
EP22000069	Asst District Attorney, Fin	XC1606 - Assst Det	1/8/07		L22000_2401 - Det	Annual	Average						40		
EP22000070	Assistant District Attorney	XC1606 - Assst Att	2/2/01		L22000_0701 - Det	Annual	Average						40		

Step	Action
2.	Use the scroll bar to scroll to the bottom of the page

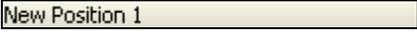
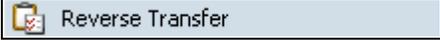
ORACLE Enterprise Performance Management System Workspace, Fusion Edition

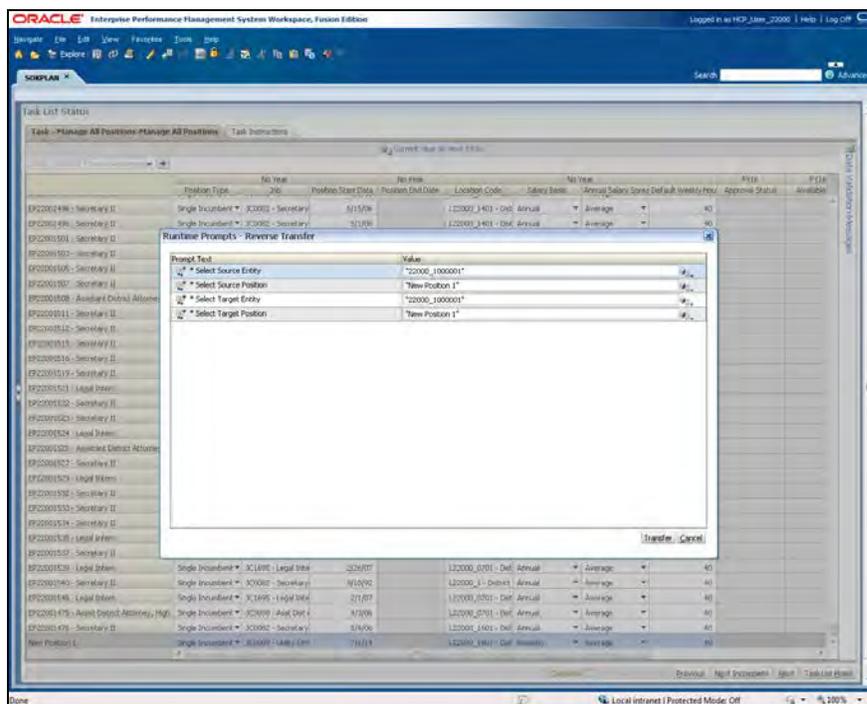
Task List Status

Task - Manage All Positions Manage All Positions Task Instructions

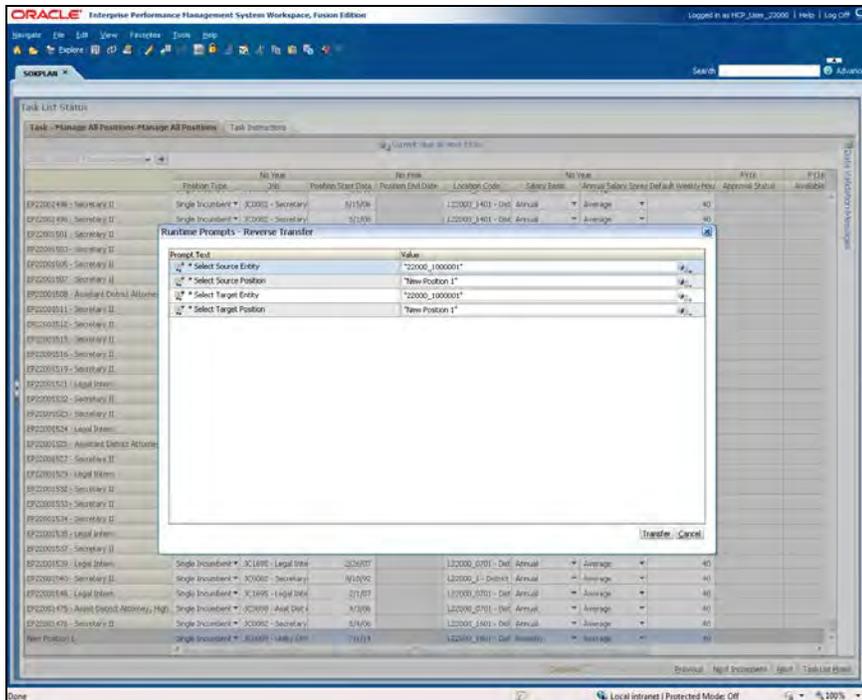
Current Year of View FY12

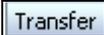
Position ID	Position Type	Job	Position Start Date	No Year	Location Code	Salary Basis	No Year	Annual Salary	Spine	Default	Weekly	Hour	Approval Status	FY14	FY14
EP22000486	Secretary II	XC3082 - Secretary	5/15/06		L22000_1401 - Det	Annual	Average						40		
EP22000488	Secretary II	XC3082 - Secretary	5/1/06		L22000_1401 - Det	Annual	Average						40		
EP22000510	Secretary II	XC3082 - Secretary	5/30/06		L22000_0201 - Det	Annual	Average						40		
EP22000503	Secretary II	XC3082 - Secretary	8/1/04		L22000_2701 - Det	Annual	Average						40		
EP22000505	Secretary II	XC3082 - Secretary	5/22/06		L22000_0402 - Det	Annual	Average						40		
EP22000507	Secretary II	XC3082 - Secretary	1/1/01		L22000_0402 - Det	Annual	Average						40		
EP22000508	Assistant District Attorney	XC1606 - Assst Att	5/22/06		L22000_0401 - Det	Annual	Average						40		
EP22000511	Secretary II	XC3082 - Secretary	5/22/06		L22000_1401 - Det	Annual	Average						40		
EP22000512	Secretary II	XC3082 - Secretary	1/1/01		L22000_0101 - Det	Annual	Average						40		
EP22000515	Secretary II	XC3082 - Secretary	3/1/07		L22000_1201 - Det	Annual	Average						40		
EP22000516	Secretary II	XC3082 - Secretary	5/15/06		L22000_1401 - Det	Annual	Average						40		
EP22000519	Secretary II	XC3082 - Secretary	5/1/06		L22000_1401 - Det	Annual	Average						40		
EP22000521	Legal Intern	XC1695 - Legal Inte	3/28/07		L22000_0701 - Det	Annual	Average						40		
EP22000522	Secretary II	XC3082 - Secretary	7/1/06		L22000_2504 - Det	Annual	Average						40		
EP22000523	Secretary II	XC3082 - Secretary	3/1/07		L22000_1203 - Det	Annual	Average						40		
EP22000524	Legal Intern	XC1695 - Legal Inte	2/28/07		L22000_0701 - Det	Annual	Average						40		
EP22000525	Assistant District Attorney	XC1606 - Assst Att	7/1/06		L22000_0101 - Det	Annual	Average						40		
EP22000527	Secretary II	XC3082 - Secretary	7/19/06		L22000_0701 - Det	Annual	Average						40		
EP22000529	Legal Intern	XC1695 - Legal Inte	2/28/07		L22000_0701 - Det	Annual	Average						40		
EP22000532	Secretary II	XC3082 - Secretary	7/19/06		L22000_0701 - Det	Annual	Average						40		
EP22000533	Secretary II	XC3082 - Secretary	1/1/01		L22000_1401 - Det	Annual	Average						40		
EP22000534	Secretary II	XC3082 - Secretary	3/1/12		L22000_1401 - Det	Annual	Average						40		
EP22000535	Legal Intern	XC1695 - Legal Inte	2/28/07		L22000_0701 - Det	Annual	Average						40		
EP22000537	Secretary II	XC3082 - Secretary	4/1/06		L22000_0401 - Det	Annual	Average						40		
EP22000539	Legal Intern	XC1695 - Legal Inte	2/28/07		L22000_0701 - Det	Annual	Average						40		
EP22000540	Secretary II	XC3082 - Secretary	9/15/02		L22000_1 - District	Annual	Average						40		
EP22000545	Legal Intern	XC1695 - Legal Inte	2/1/07		L22000_0701 - Det	Annual	Average						40		
EP22000575	Asst District Attorney, High	XC3090 - Assst Det	4/19/09		L22000_0701 - Det	Annual	Average						40		
EP22000576	Secretary II	XC3082 - Secretary	3/8/06		L22000_1601 - Det	Annual	Average						40		
New Position 1	Single Incumbent	XC3089 - Liability Off	7/1/14		L22000_1801 - Det	Bivestly	Average						40		

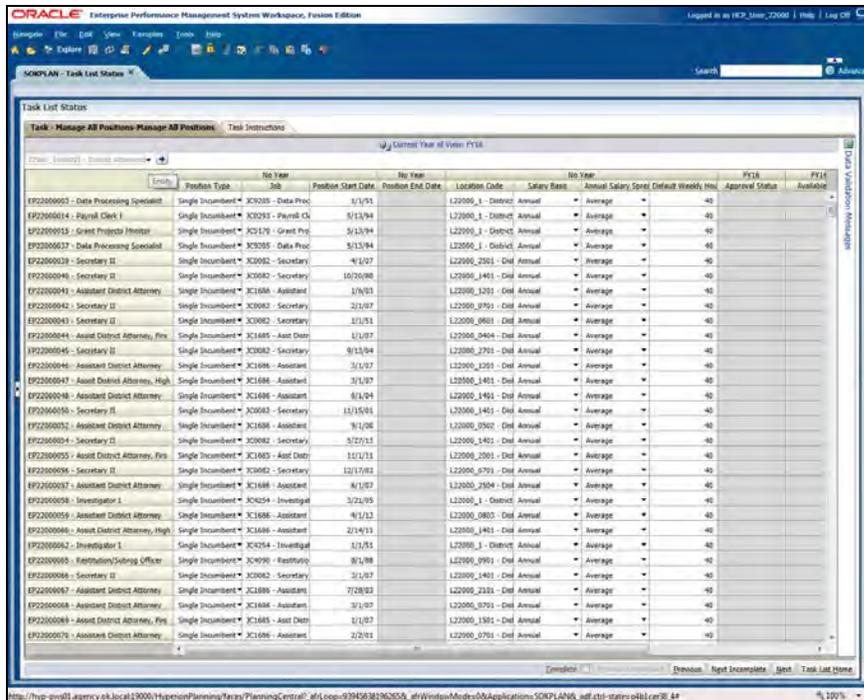
Step	Action
3.	Right-click the New Position 1 object. 
4.	Click the Reverse Transfer menu. 
5.	A message box appears reading "Allocation details are specific to the entity and cannot be copied back. Please enter allocations after reversing the transfer." Click the OK button. 



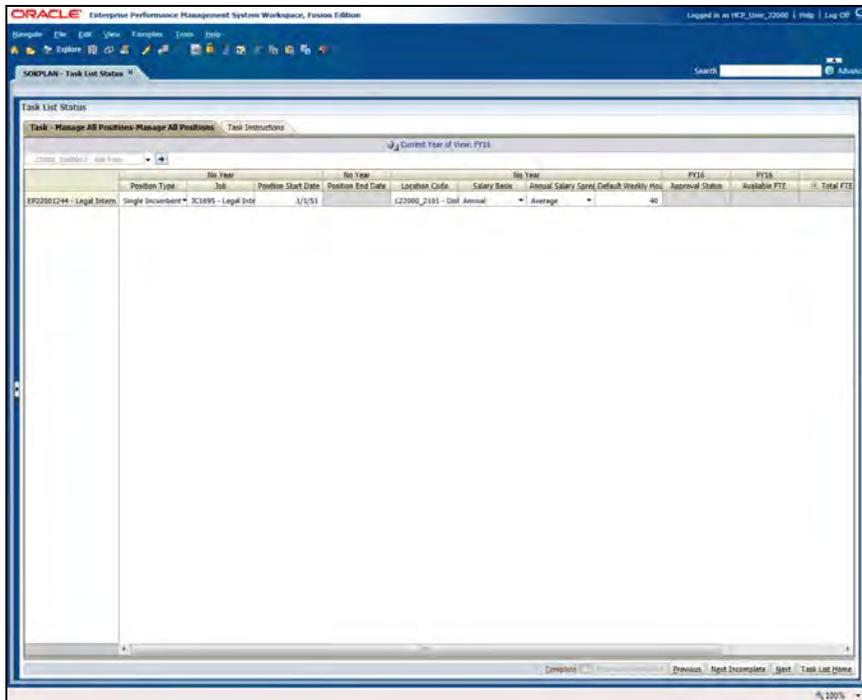
Step	Action
6.	<p>Select Effective Date</p> <p>-Select/Enter appropriate values in the fields</p> <p>Select Source Entity: 22000_1000007</p> <p>Select Source Position: New Position 1</p> <p>Select Target Entity: 22000_1000001</p> <p>Select Target Position: New Position 1</p>



Step	Action
7.	Enter the desired information into the *Select Source Entity field. Enter "22000_1000001" .
8.	Click the Transfer button. 
9.	A message appears reading: <i>"ReverseTransfer was successful"</i> Click the OK button. 



Step	Action
10.	<p><i>Check the Position Reverse Transferred</i> <i>-Select Entity from the page drop down: for example: 22000_1000007</i></p> <p>Click the Entity dropdown button to activate the menu.</p> 
11.	<p>Click the 22000_1000007 - Jail Fees cell.</p> 
12.	<p>Click the Go button.</p> 



Step	Action
13.	<i>New Position 1 is not present in the list of positions</i>
14.	End of Procedure.

3.17 - Delete position for specific Version

In this topic you will delete the newly created position for this version only. (Version = Agency Request)

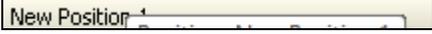
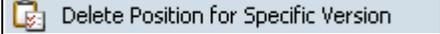
The business rule “DeletePositionVrs” will give a successful message.

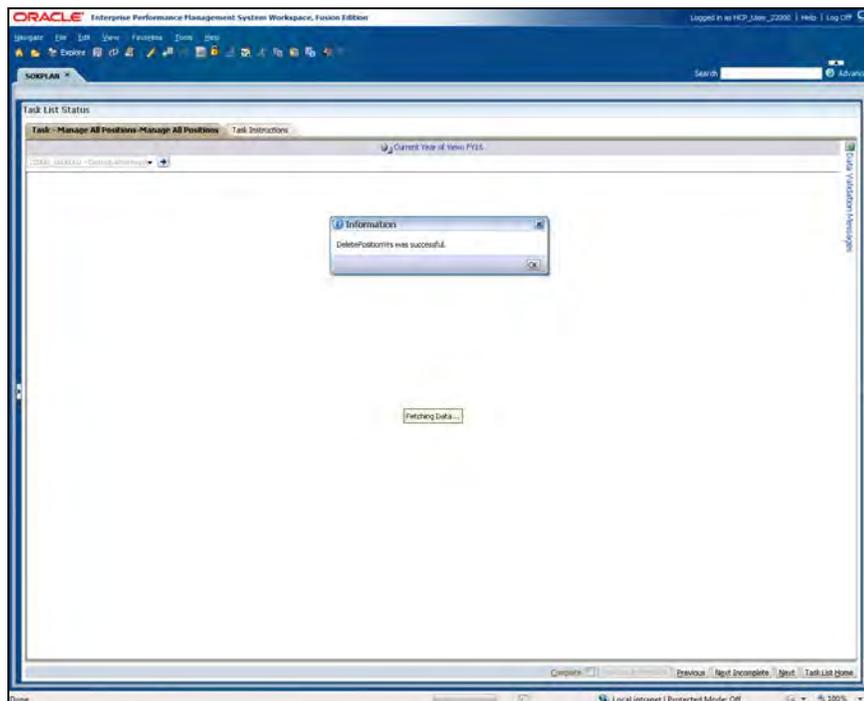
Procedure

Position Type	Job	Position Start Date	Position End Date	Location Code	Salary Base	Annual Salary Spend	Default Weekly Hrs	Approval Status	Available
EP2000003 - Data Processing Specialist	X3026 - Data Pro	1/1/15		122000_1 - District	Annual	Average	40		
EP2000014 - Payroll Clerk I	X3029 - Payroll Cl	5/13/14		122000_1 - District	Annual	Average	40		
EP2000015 - Grant Process Monitor	X3170 - Grant Pro	5/13/14		122000_1 - District	Annual	Average	40		
EP2000027 - Data Processing Specialist	X3026 - Data Pro	5/13/14		122000_1 - District	Annual	Average	40		
EP2000039 - Secretary II	X3062 - Secretary	9/15/03		122000_1 - District	Annual	Average	40		
EP2000040 - Secretary II	X3062 - Secretary	10/20/03		122000_1401 - Dist	Annual	Average	40		
EP2000041 - Assistant District Attorney	X3168 - Assistant	1/6/03		122000_1201 - Dist	Annual	Average	40		
EP2000042 - Secretary II	X3062 - Secretary	2/18/07		122000_0791 - Dist	Annual	Average	40		
EP2000043 - Secretary II	X3062 - Secretary	1/1/15		122000_0601 - Dist	Annual	Average	40		
EP2000044 - Assist District Attorney, Fin	X3169 - Asst Dist	11/10/14		122000_1201 - Dist	Annual	Average	40		
EP2000045 - Secretary II	X3062 - Secretary	9/13/04		122000_0701 - Dist	Annual	Average	40		
EP2000046 - Assistant District Attorney	X3168 - Assistant	3/1/07		122000_1201 - Dist	Annual	Average	40		
EP2000047 - Assist District Attorney, High	X3060 - Asst Det	5/15/09		122000_0701 - Dist	Annual	Average	40		
EP2000048 - Assistant District Attorney	X3168 - Assistant	4/1/04		122000_1401 - Dist	Annual	Average	40		
EP2000050 - Secretary II	X3062 - Secretary	11/15/01		122000_1401 - Dist	Annual	Average	40		
EP2000052 - Assistant District Attorney	X3168 - Assistant	9/3/00		122000_0602 - Dist	Annual	Average	40		
EP2000054 - Secretary II	X3062 - Secretary	5/27/13		122000_1401 - Dist	Annual	Average	40		
EP2000055 - Assist District Attorney, Fin	X3169 - Asst Dist	11/1/11		122000_2001 - Dist	Annual	Average	40		
EP2000058 - Secretary II	X3062 - Secretary	12/17/03		122000_0701 - Dist	Annual	Average	40		
EP2000057 - Assistant District Attorney	X3168 - Assistant	6/1/07		122000_2504 - Dist	Annual	Average	40		
EP2000058 - Investigator I	X3054 - Investigat	3/21/06		122000_1 - District	Annual	Average	40		
EP2000059 - Assistant District Attorney	X3168 - Assistant	4/11/12		122000_0601 - Dist	Annual	Average	40		
EP2000060 - Assist District Attorney, High	X3060 - Asst Det	5/13/07		122000_1 - District	Annual	Average	40		
EP2000062 - Investigator I	X3054 - Investigat	1/1/15		122000_1 - District	Annual	Average	40		
EP2000065 - Health Services Officer	X3470 - Facilities	6/1/08		122000_0601 - Dist	Annual	Average	40		
EP2000066 - Secretary II	X3062 - Secretary	7/26/04		122000_0701 - Dist	Annual	Average	40		
EP2000067 - Assistant District Attorney	X3168 - Assistant	7/26/03		122000_2101 - Dist	Annual	Average	40		
EP2000068 - Assistant District Attorney	X3168 - Assistant	3/1/07		122000_0701 - Dist	Annual	Average	40		
EP2000069 - Assist District Attorney, Fin	X3169 - Asst Dist	1/5/07		122000_2401 - Dist	Annual	Average	40		
EP2000070 - Assistant District Attorney	X3168 - Assistant	2/2/01		122000_0701 - Dist	Annual	Average	40		

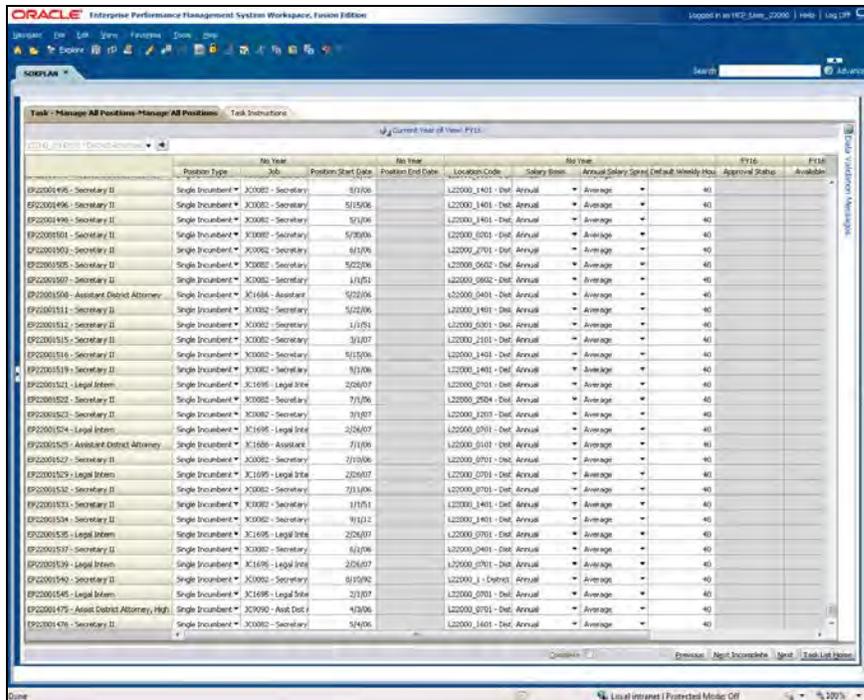
Step	Action
1.	Use the Scroll Bar to scroll to the bottom of the page

Position Type	Job	Position Start Date	Position End Date	Location Code	Salary Base	Annual Salary Spend	Default Weekly Hrs	Approval Status	Available
EP2000146 - Secretary II	X3062 - Secretary	9/15/03		122000_1401 - Dist	Annual	Average	40		
EP2000148 - Secretary II	X3062 - Secretary	3/1/08		122000_1401 - Dist	Annual	Average	40		
EP2000151 - Secretary II	X3062 - Secretary	5/20/08		122000_0201 - Dist	Annual	Average	40		
EP2000159 - Secretary II	X3062 - Secretary	6/1/06		122000_0701 - Dist	Annual	Average	40		
EP2000166 - Secretary II	X3062 - Secretary	5/20/06		122000_0602 - Dist	Annual	Average	40		
EP2000167 - Secretary II	X3062 - Secretary	1/1/15		122000_0602 - Dist	Annual	Average	40		
EP2000168 - Assistant District Attorney	X3168 - Assistant	5/22/06		122000_0401 - Dist	Annual	Average	40		
EP2000181 - Secretary II	X3062 - Secretary	5/22/06		122000_1401 - Dist	Annual	Average	40		
EP2000182 - Secretary II	X3062 - Secretary	1/1/15		122000_0101 - Dist	Annual	Average	40		
EP2000183 - Secretary II	X3062 - Secretary	3/1/07		122000_2101 - Dist	Annual	Average	40		
EP2000184 - Secretary II	X3062 - Secretary	5/15/06		122000_1401 - Dist	Annual	Average	40		
EP2000189 - Secretary II	X3062 - Secretary	5/1/06		122000_1401 - Dist	Annual	Average	40		
EP2000192 - Legal Intern	X3169 - Legal Inte	3/26/07		122000_0701 - Dist	Annual	Average	40		
EP2000192 - Legal Intern	X3062 - Secretary	7/1/06		122000_2504 - Dist	Annual	Average	40		
EP2000423 - Secretary II	X3062 - Secretary	3/1/07		122000_1203 - Dist	Annual	Average	40		
EP2000524 - Legal Intern	X3169 - Legal Inte	3/26/07		122000_0701 - Dist	Annual	Average	40		
EP2000525 - Assistant District Attorney	X3168 - Assistant	7/1/06		122000_0101 - Dist	Annual	Average	40		
EP2000527 - Secretary II	X3062 - Secretary	7/1/06		122000_0701 - Dist	Annual	Average	40		
EP2000529 - Legal Intern	X3169 - Legal Inte	3/26/07		122000_0701 - Dist	Annual	Average	40		
EP2000532 - Secretary II	X3062 - Secretary	7/1/06		122000_0701 - Dist	Annual	Average	40		
EP2000533 - Secretary II	X3062 - Secretary	1/1/15		122000_1401 - Dist	Annual	Average	40		
EP2000534 - Secretary II	X3062 - Secretary	3/1/12		122000_1401 - Dist	Annual	Average	40		
EP2000535 - Legal Intern	X3169 - Legal Inte	3/26/07		122000_0701 - Dist	Annual	Average	40		
EP2000537 - Secretary II	X3062 - Secretary	6/1/06		122000_0401 - Dist	Annual	Average	40		
EP2000539 - Legal Intern	X3169 - Legal Inte	3/26/07		122000_0701 - Dist	Annual	Average	40		
EP2000540 - Secretary II	X3062 - Secretary	9/15/02		122000_1 - District	Annual	Average	40		
EP2000546 - Legal Intern	X3169 - Legal Inte	3/1/07		122000_0701 - Dist	Annual	Average	40		
EP2000175 - Assist District Attorney, High	X3060 - Asst Det	4/10/09		122000_0701 - Dist	Annual	Average	40		
EP2000176 - Secretary II	X3062 - Secretary	3/9/06		122000_1601 - Dist	Annual	Average	40		
New Position	X3069 - Utility Off	7/1/14		122000_1901 - Dist	Biweekly	Average	40		

Step	Action
2.	Right-click the New Position 1 object. 
3.	Click the Delete Position for Specific Version menu. 
4.	A message box appears reading "Delete this position?" Click the OK button. 



Step	Action
5.	A message appears reading: "DeletePositionVrs was successful" Click the OK button. 



Step	Action
6.	Click the Task List Home button. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Task List Home</div>
7.	End of Procedure.

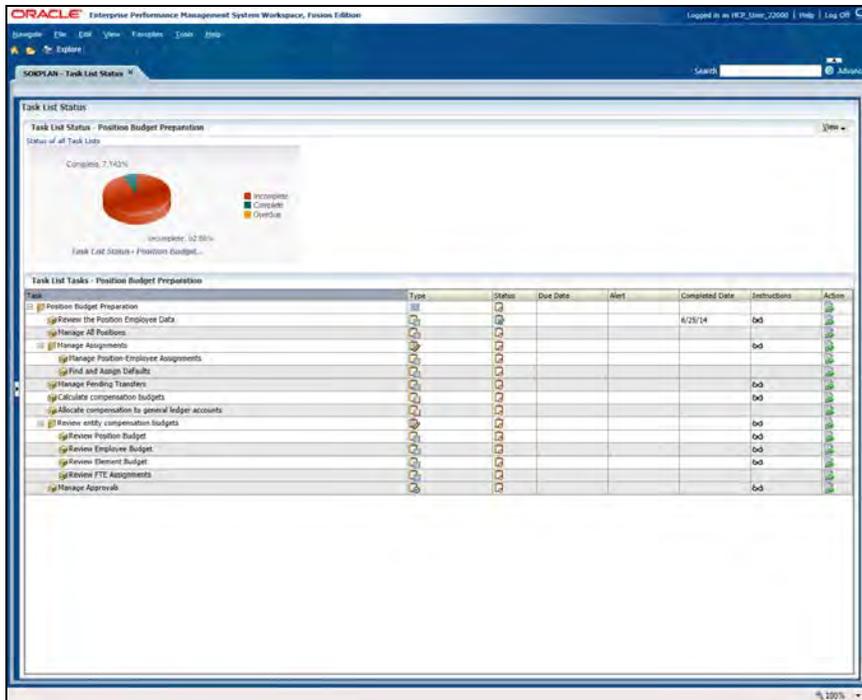
3.18 - Delete position Across all Versions

In this topic you will create a new position.

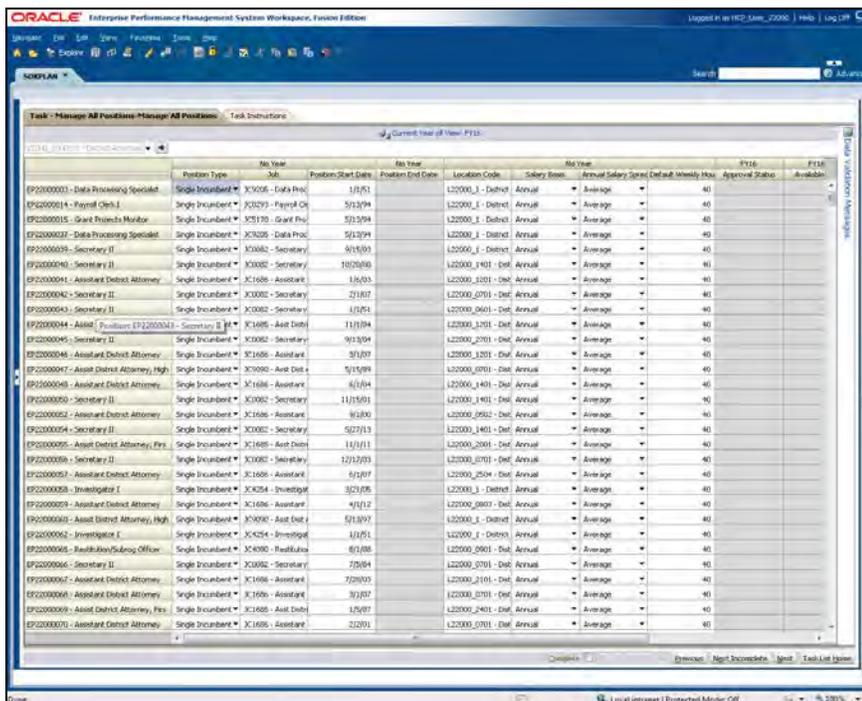
You will then delete this position from this and all other versions. (Agency Request, Agency BWP).

The business rule will give a success message, “DeletePosition was successful”.

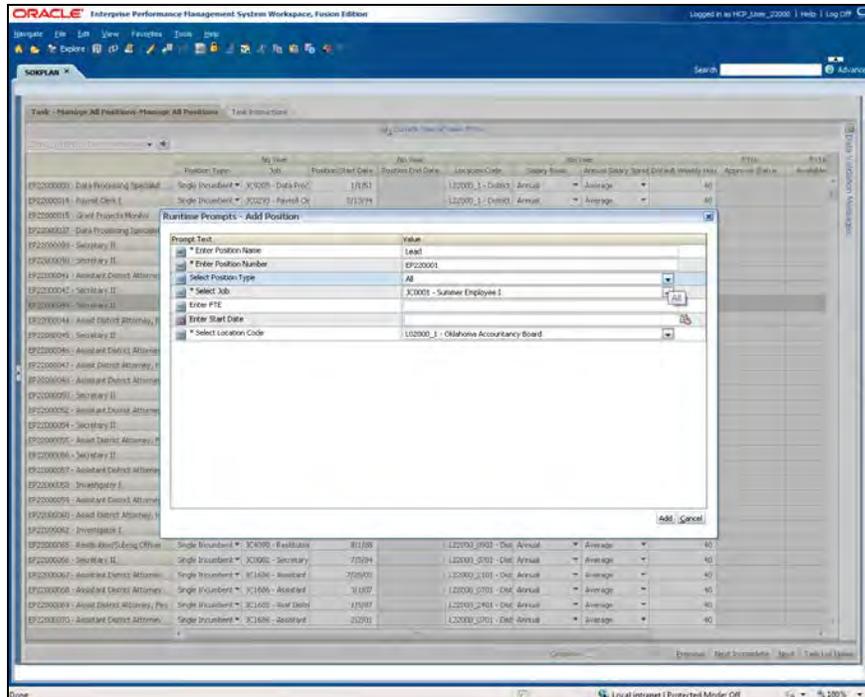
Procedure



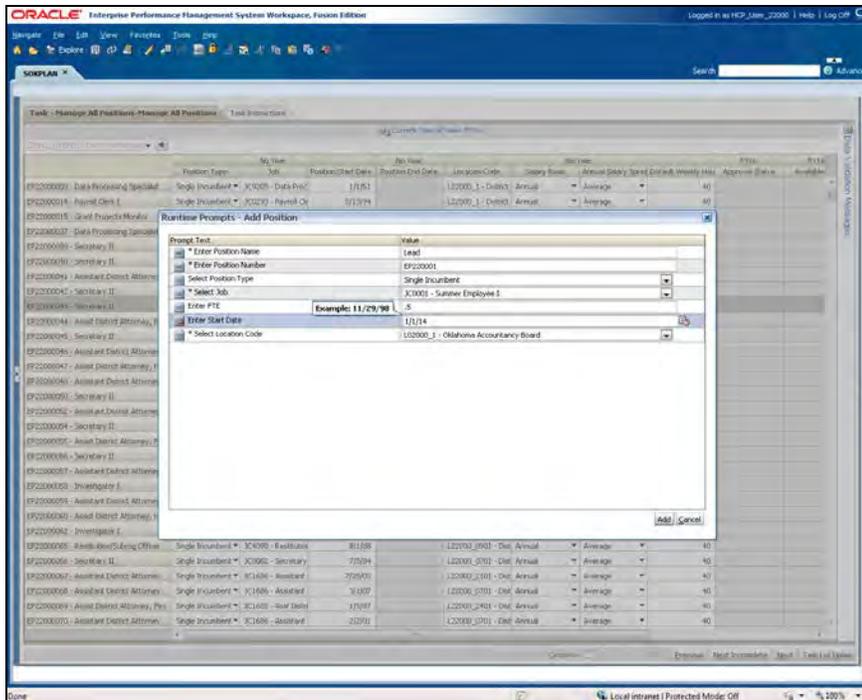
Step	Action
1.	Click the Manage All Positions Action button.



Step	Action
2.	<p><i>E.g.:</i></p> <p>Right-click the EP22000043 - Secretary II object.</p> <p>EP22000043 - Secretary II</p>
3.	<p>Click the Add Position menu.</p> <p></p>



Step	Action
4.	<p><i>Provide Position Details</i></p> <p><i>-Enter/Select values for all the fields</i></p> <p>Enter Position Name: for example: Lead Enter Position Number: for example: EP220001 Select Position Type: for example: Single Incumbent Select Job: for example: JC0006 Enter FTE: for example: .5 Enter Start Date: for example: 1/1/14 Select Location Code: for example: L22000_1801</p>



Step	Action
5.	Click the Add button. 
6.	A message appears confirming the add new position was successful Click the OK button. 

Position Type	Job	Problem Start Date	Problem End Date	Location Code	Salary Basis	Annual Salary Spread	Default Weekly Hour	FTE	P14
Single Incumbent	X3026 - Data Pro	1/1/13		122000_1 - District	Annual	Average	40		
Single Incumbent	X3279 - Payroll Op	5/13/09		122000_1 - District	Annual	Average	40		
Single Incumbent	X3170 - Grant Pro	5/13/09		122000_1 - District	Annual	Average	40		
Single Incumbent	X3205 - Data Pro	5/13/09		122000_1 - District	Annual	Average	40		
Single Incumbent	X3681 - Secretary	9/15/00		122000_1 - District	Annual	Average	40		
Single Incumbent	X3002 - Secretary	10/20/00		122000_1401 - Dist	Annual	Average	40		
Single Incumbent	X3168 - Assistant	1/6/03		122000_1201 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	2/18/07		122000_0701 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	1/15/11		122000_0601 - Dist	Annual	Average	40		
Single Incumbent	X3168 - Asst Dist	1/11/04		122000_1201 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	9/13/04		122000_0701 - Dist	Annual	Average	40		
Single Incumbent	X3168 - Assistant	3/1/07		122000_1201 - Dist	Annual	Average	40		
Single Incumbent	X3090 - Asst Dist	5/15/09		122000_0701 - Dist	Annual	Average	40		
Single Incumbent	X3168 - Assistant	4/1/04		122000_1401 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	11/15/01		122000_1401 - Dist	Annual	Average	40		
Single Incumbent	X3168 - Assistant	9/3/00		122000_0502 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	5/27/13		122000_1401 - Dist	Annual	Average	40		
Single Incumbent	X3168 - Asst Dist	1/1/11		122000_2001 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	12/17/03		122000_0701 - Dist	Annual	Average	40		
Single Incumbent	X3168 - Assistant	8/1/07		122000_2504 - Dist	Annual	Average	40		
Single Incumbent	X3024 - Investigat	3/21/05		122000_1 - District	Annual	Average	40		
Single Incumbent	X3168 - Assistant	4/11/12		122000_0601 - Dist	Annual	Average	40		
Single Incumbent	X3090 - Asst Dist	5/13/07		122000_1 - District	Annual	Average	40		
Single Incumbent	X3024 - Investigat	1/1/11		122000_1 - District	Annual	Average	40		
Single Incumbent	X3490 - Facilities	8/1/88		122000_0601 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	7/28/04		122000_0701 - Dist	Annual	Average	40		
Single Incumbent	X3168 - Assistant	7/28/00		122000_2101 - Dist	Annual	Average	40		
Single Incumbent	X3168 - Assistant	3/1/07		122000_0701 - Dist	Annual	Average	40		
Single Incumbent	X3168 - Asst Dist	1/5/07		122000_2401 - Dist	Annual	Average	40		
Single Incumbent	X3168 - Assistant	2/21/01		122000_0701 - Dist	Annual	Average	40		

Step	Action
7.	Use the Scroll Bar to scroll to the bottom of the page to the newly created position

Position Type	Job	Problem Start Date	Problem End Date	Location Code	Salary Basis	Annual Salary Spread	Default Weekly Hour	FTE	P14
Single Incumbent	X3001 - Secretary	5/15/06		122000_1401 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	3/1/06		122000_1401 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	5/25/06		122000_0701 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	1/1/06		122000_0701 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	1/22/06		122000_0701 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	1/15/11		122000_0602 - Dist	Annual	Average	40		
Single Incumbent	X3168 - Assistant	10/20/06		122000_0401 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	9/25/06		122000_1401 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	1/1/11		122000_0301 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	3/1/07		122000_2101 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	5/15/06		122000_1401 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	1/1/06		122000_1401 - Dist	Annual	Average	40		
Single Incumbent	X3169 - Legal Intn	2/24/07		122000_0701 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	7/1/06		122000_2504 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	3/1/07		122000_1201 - Dist	Annual	Average	40		
Single Incumbent	X3169 - Legal Intn	2/24/07		122000_0701 - Dist	Annual	Average	40		
Single Incumbent	X3168 - Assistant	7/1/06		122000_0101 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	7/10/06		122000_0701 - Dist	Annual	Average	40		
Single Incumbent	X3169 - Legal Intn	2/24/07		122000_0701 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	7/11/06		122000_0701 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	1/1/04		122000_1401 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	9/11/11		122000_1401 - Dist	Annual	Average	40		
Single Incumbent	X3169 - Legal Intn	2/24/07		122000_0701 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	4/1/06		122000_0401 - Dist	Annual	Average	40		
Single Incumbent	X3169 - Legal Intn	2/24/07		122000_0701 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	10/10/07		122000_1 - District	Annual	Average	40		
Single Incumbent	X3169 - Legal Intn	2/1/07		122000_0701 - Dist	Annual	Average	40		
Single Incumbent	X3090 - Asst Dist	4/3/06		122000_0701 - Dist	Annual	Average	40		
Single Incumbent	X3002 - Secretary	5/14/06		122000_1601 - Dist	Annual	Average	40		
New Position	X3001 - Summer C	1/1/14		102000_1 - Oklaheer Biweekly	Average	40			

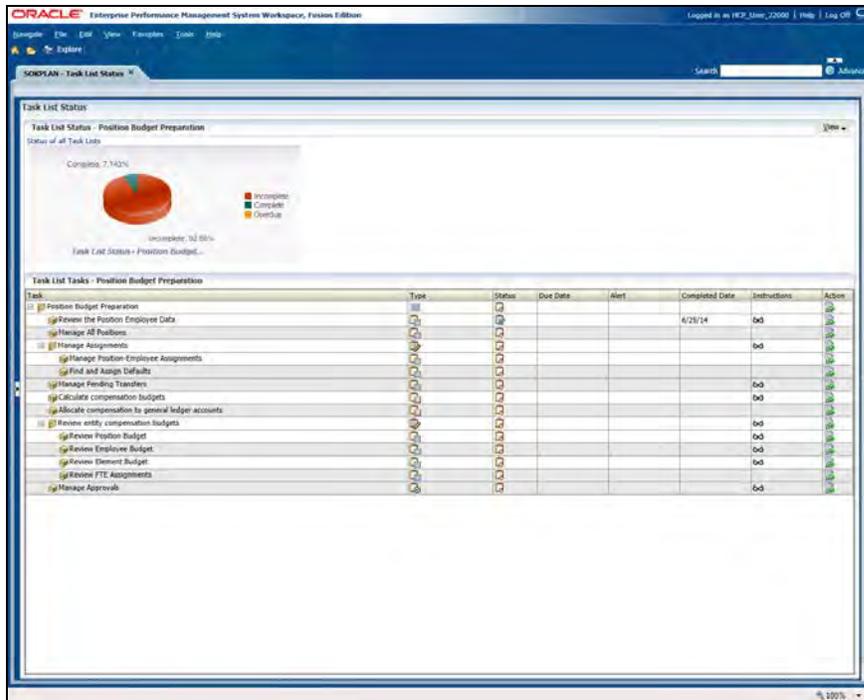
Step	Action
8.	<i>E.g.:</i> Right-click the New Position 1 object. 
9.	Click the Delete Position Across All Versions menu. 
10.	<i>A message box appears reading "Delete this position?"</i> Click the OK button. 
11.	<i>A message appears reading: "DeletePosition was successful"</i> Click the OK button. 
12.	Click the Task List Home button. 
13.	 End of Procedure.

3.19 - Synchronize position properties

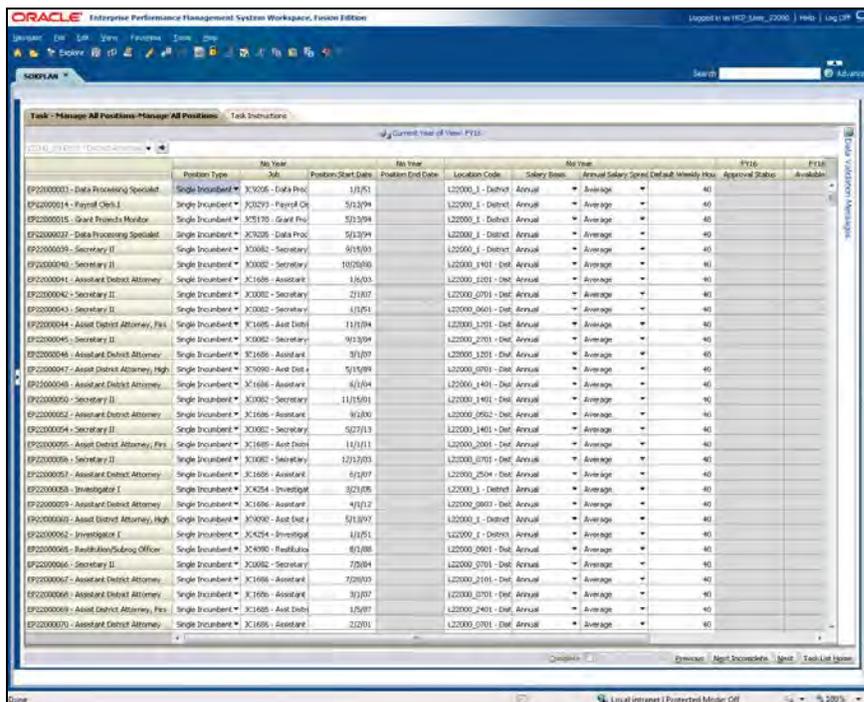
After making edits to the positions and employees, in this topic you will synchronize all the position properties as updated.

The business rule will give a message, "PushProMasterData was successful".

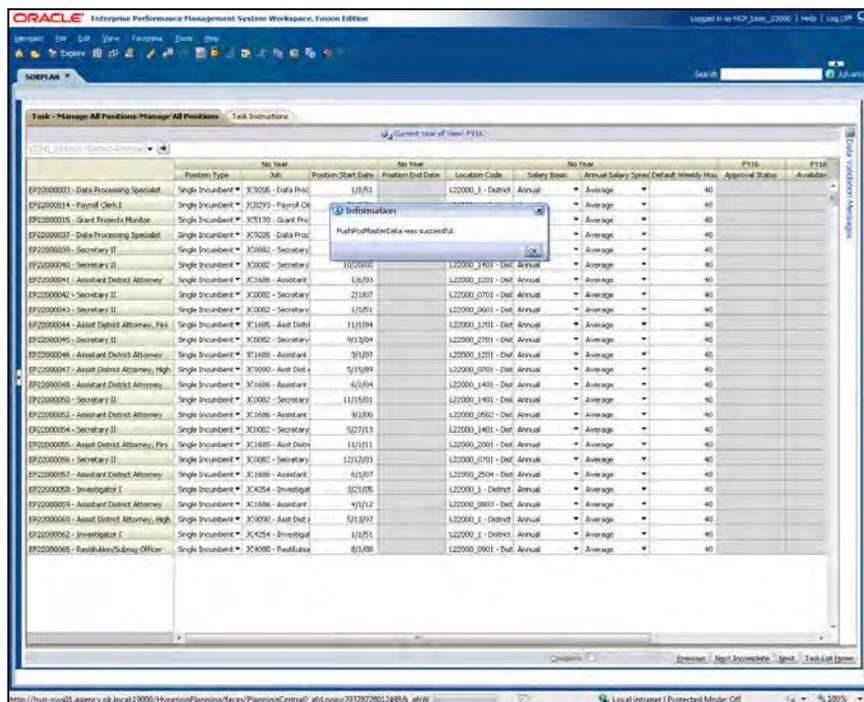
Procedure



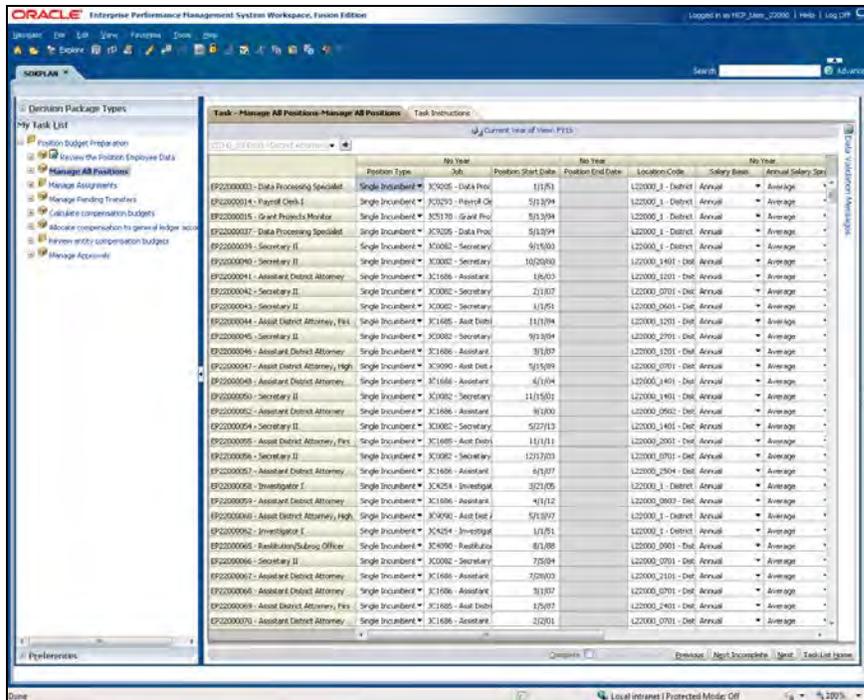
Step	Action
1.	Click the Manage All Positions Action button.

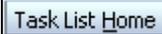


Step	Action
2.	<p><i>Synchronize Position Properties</i> <i>-Right-click any of the row headers in the form</i></p> <p>e.g.:</p> <p>Right-click the EP22000014 - Payroll Clerk I object.</p> <p>EP22000014 - Payroll Clerk I</p>
3.	<p>Click the Synchronize Position Properties menu.</p> <p> Synchronize Position Properties</p>



Step	Action
4.	<p>A message appears reading: "PushPosMasterData was successful."</p> <p>Click the OK button.</p> <p></p>

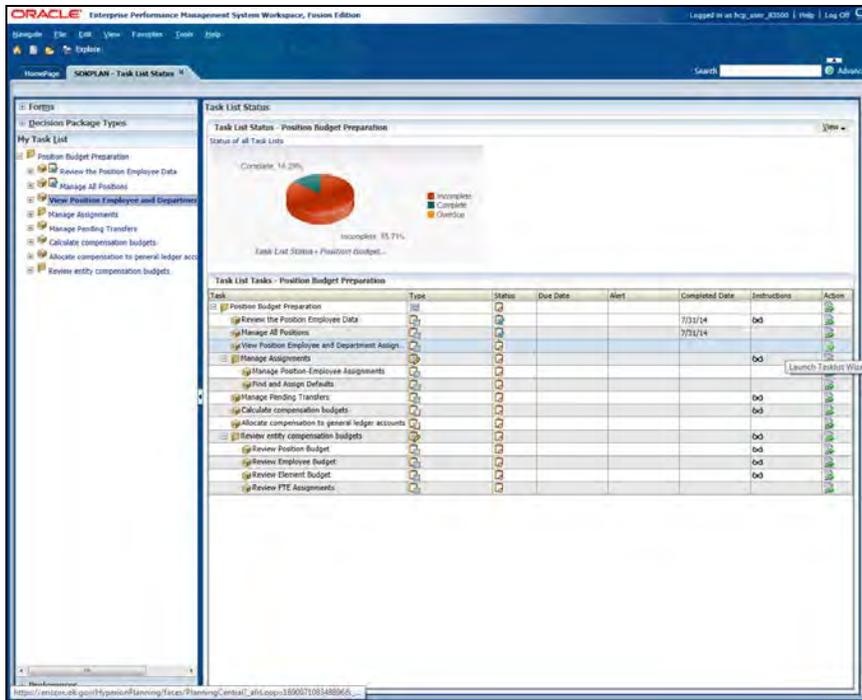


Step	Action
5.	Complete "Manage All Positions" Task Click the Complete option.
6.	Click the Task List Home button. 
7.	End of Procedure.

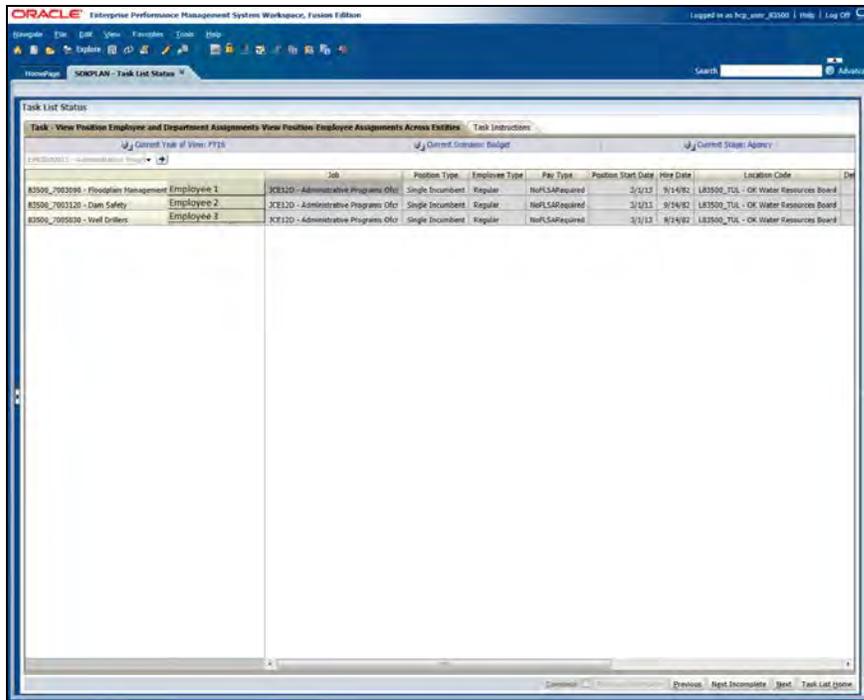
3.19B - View Position Employee and Department Assignments

In this topic you will review the existing position split across departments. Select the desired position in the page drop down to view all the departments that the position belongs to. Position's FTE is split between the departments to allocate the compensation across all the listed departments.

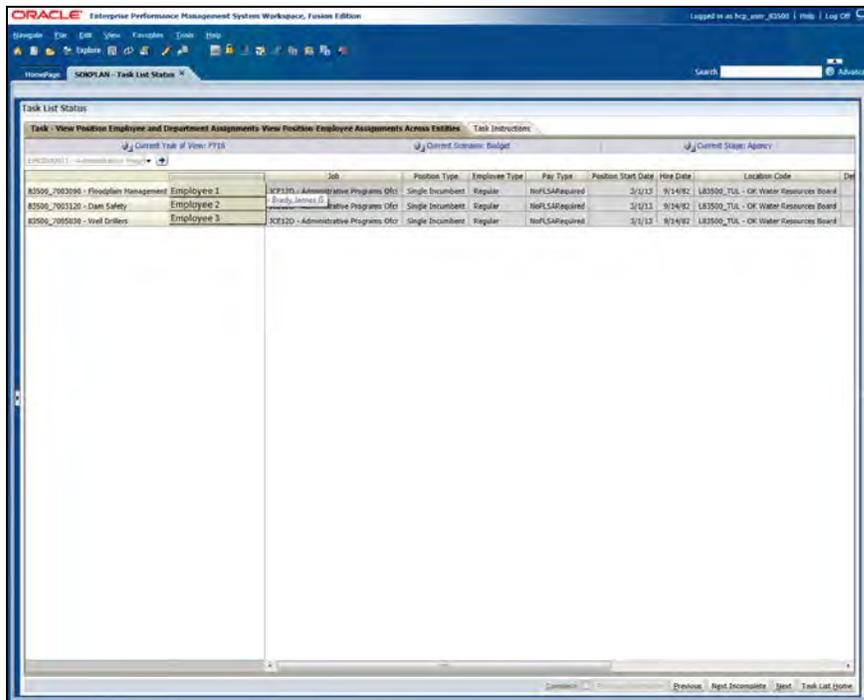
Procedure

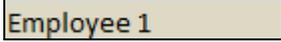
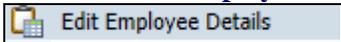


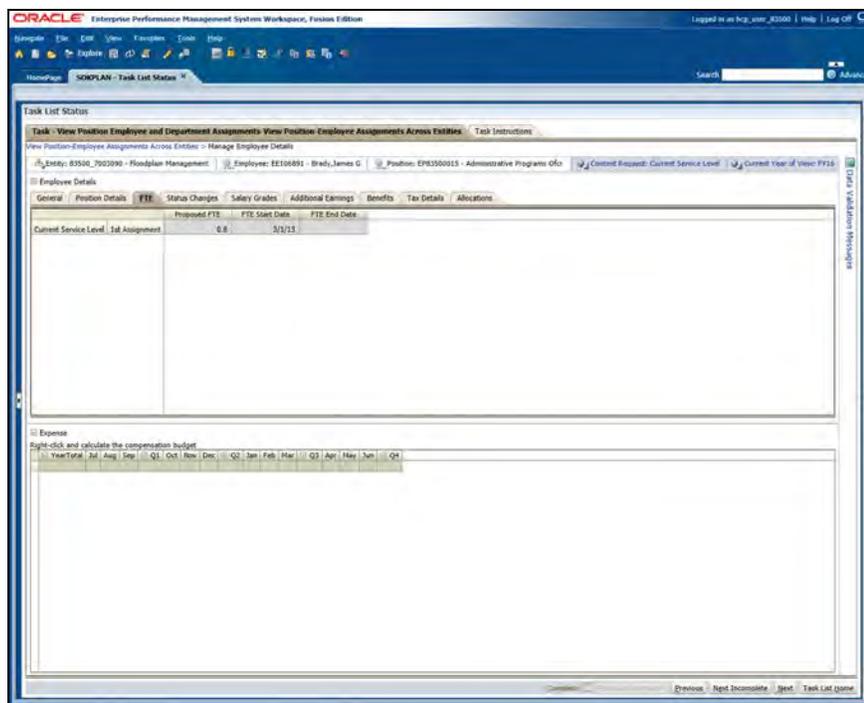
Step	Action
1.	Click the View Position Employee and Department Action button. 
2.	<i>Hide the View Pane (If not already hidden)</i> Click the Collapse Pane button. 



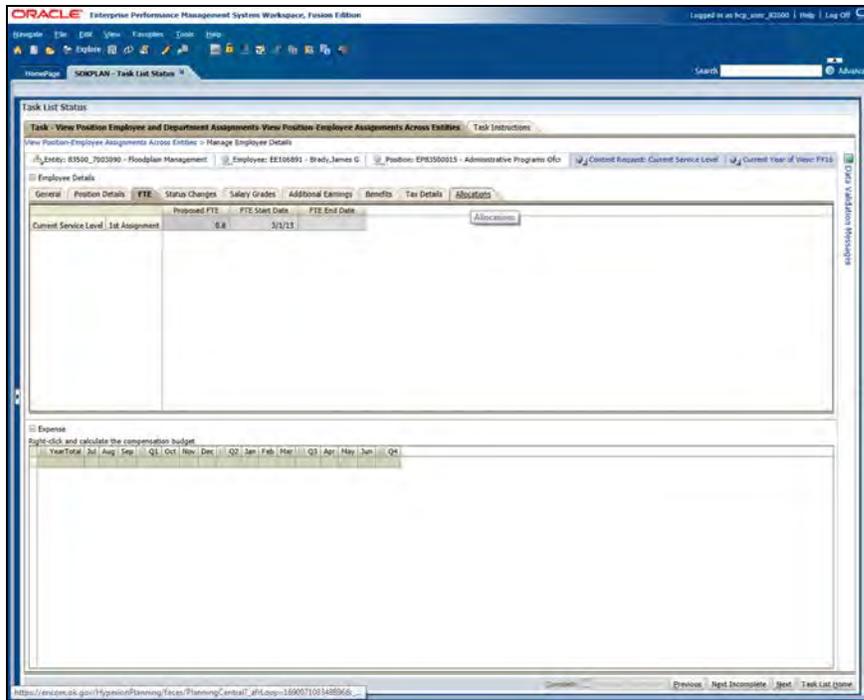
Step	Action
3.	Scroll to the right of the page to review the data.

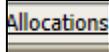


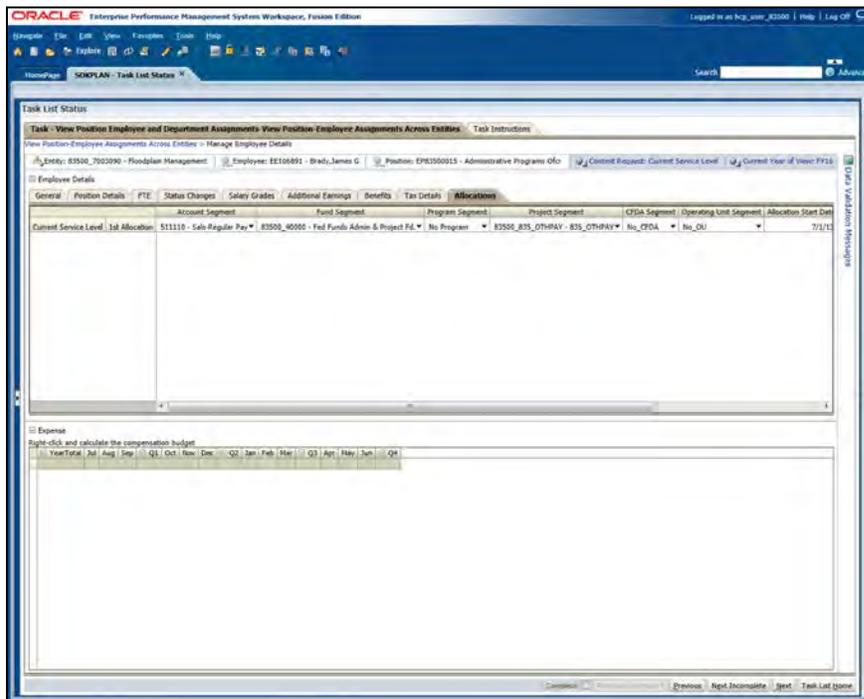
Step	Action
4.	<p>Right-click on the employee in the first row</p> <p><i>E.g.</i></p> <p>Right-click the Employee 1 object.</p> 
5.	<p>Click the Edit Employee Details menu.</p> 
6.	<p>Click the FTE tab.</p> 



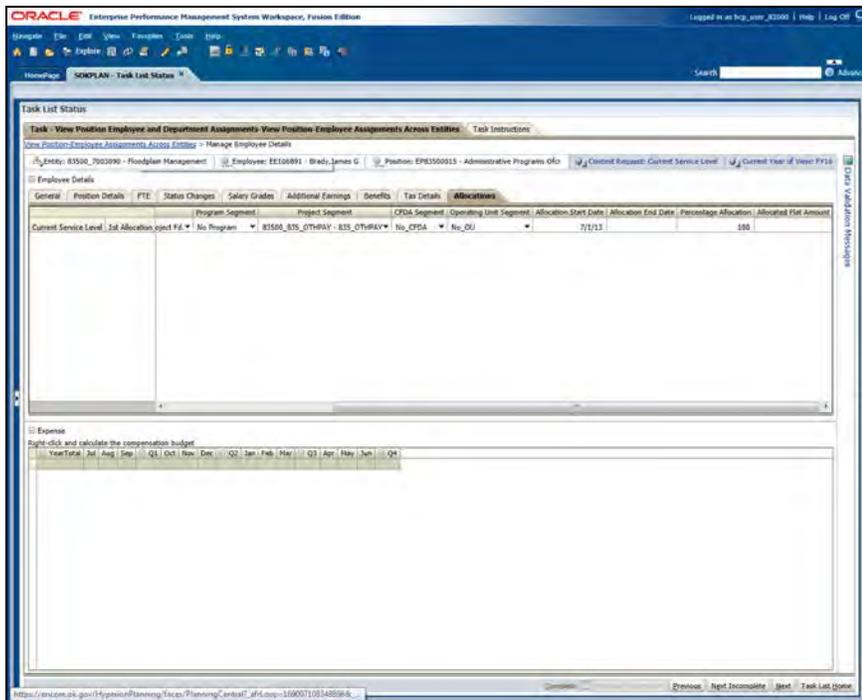
Step	Action
7.	<p>Note that FTE for the first department is .8</p> 

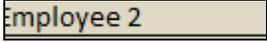
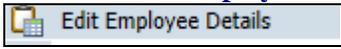


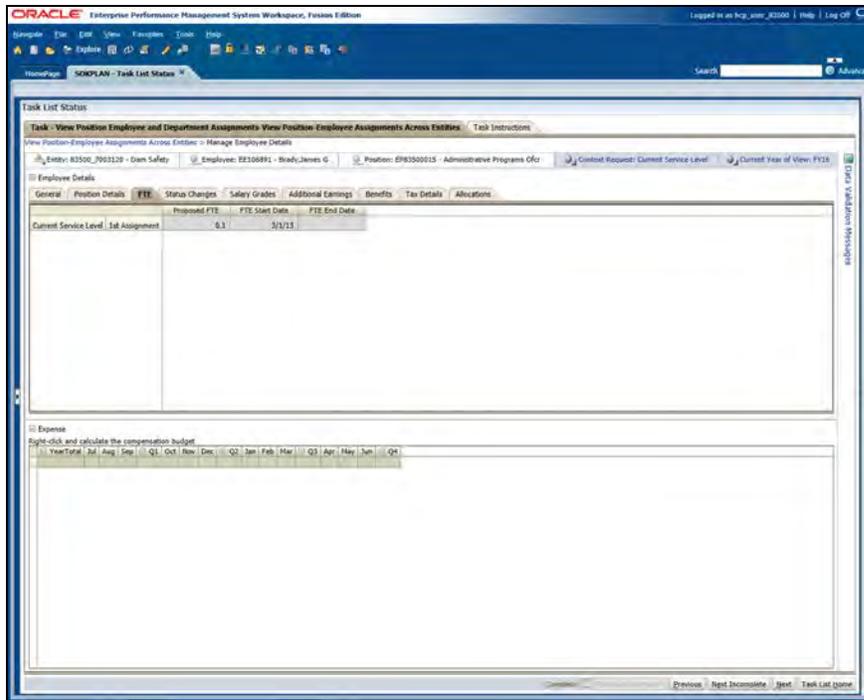
Step	Action
8.	Click the Allocations tab. 



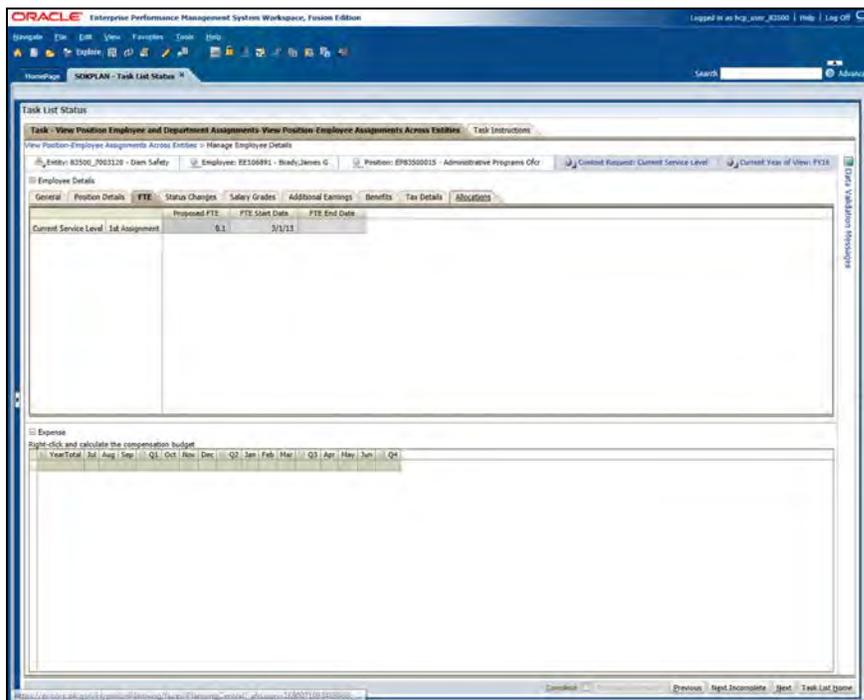
Step	Action
9.	Scroll to the right of the page to see the allocation percentage - 100%
10.	Note that the allocation percentage is 100%

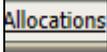


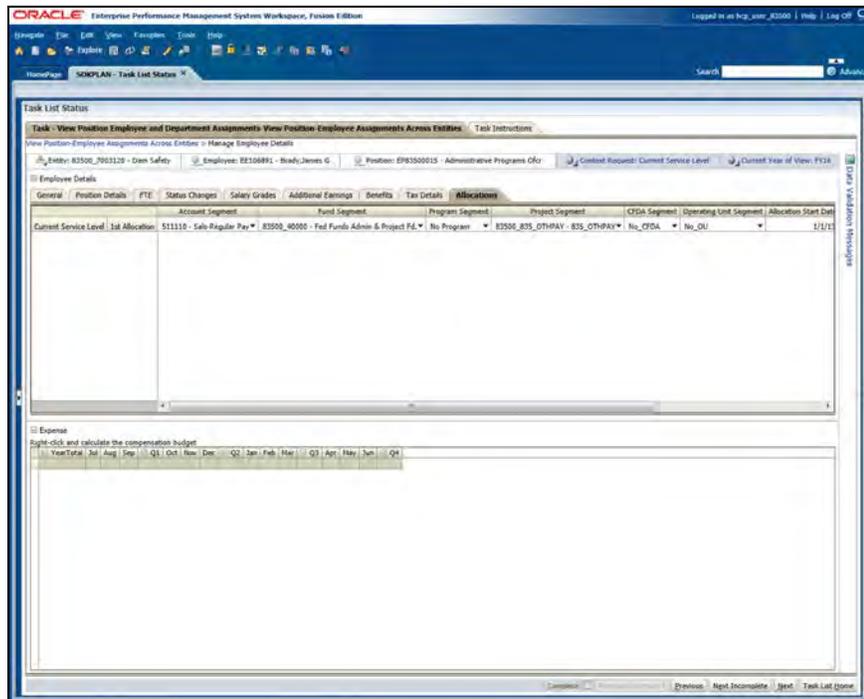
Step	Action
11.	Click the View Position-Employee Assignments Across Entities link. View Position-Employee Assignments Across Entities
12.	Right-click on the employee in the second row E.g. Right-click the Employee 1 object. 
13.	Click the Edit Employee Details menu. 
14.	Click the FTE tab. 



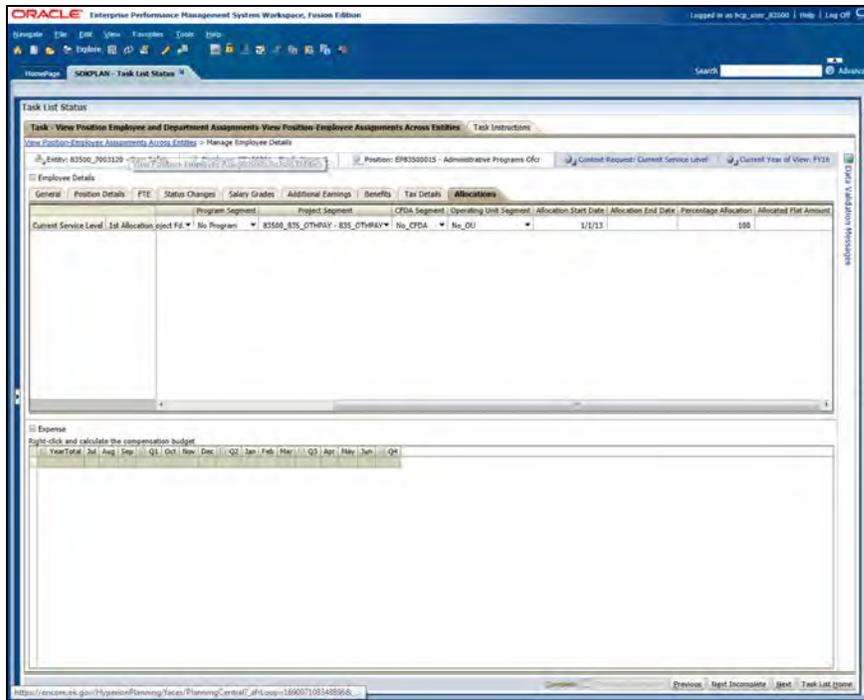
Step	Action		
15.	<p><i>Note that FTE for the second department is .1</i></p> <table border="1" style="margin-left: 40px;"> <tr> <td style="width: 100px;">0.1</td> <td style="width: 100px;">3/1/13</td> </tr> </table>	0.1	3/1/13
0.1	3/1/13		

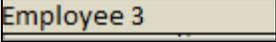
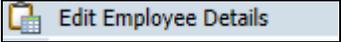


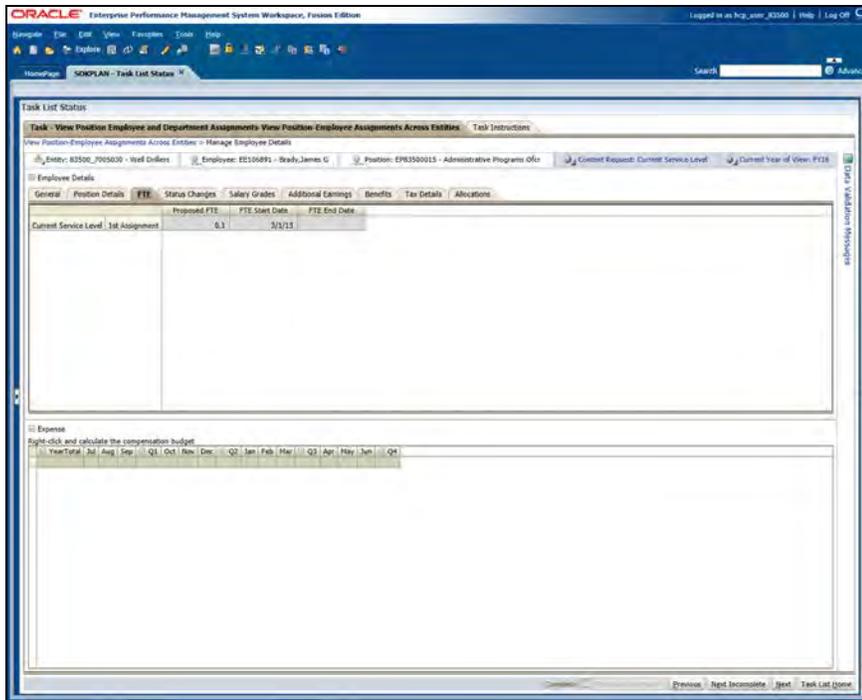
Step	Action
16.	Click the Allocations tab. 



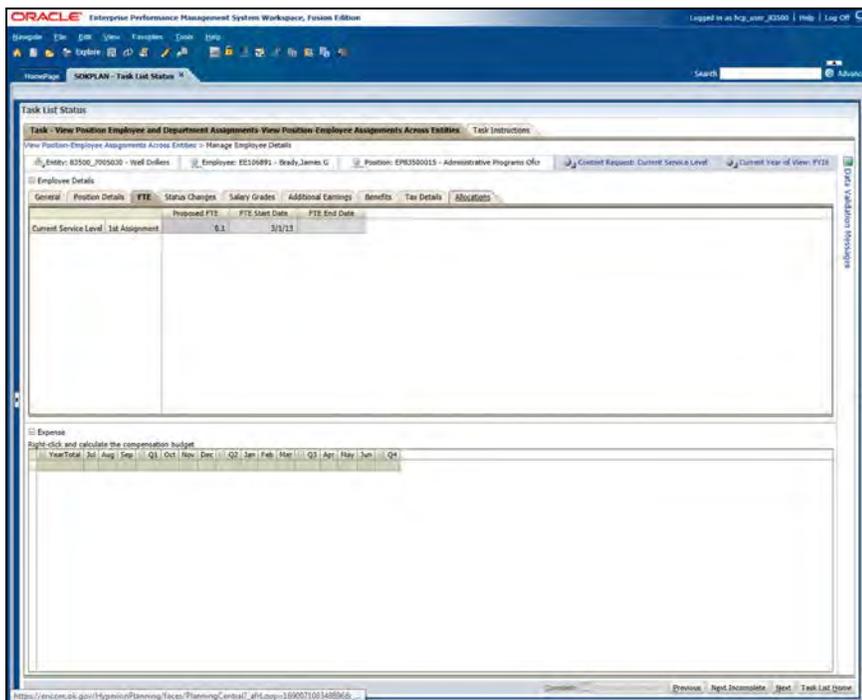
Step	Action
17.	<i>Scroll to the right of the form to review the allocation percentage - 100%</i>

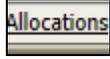


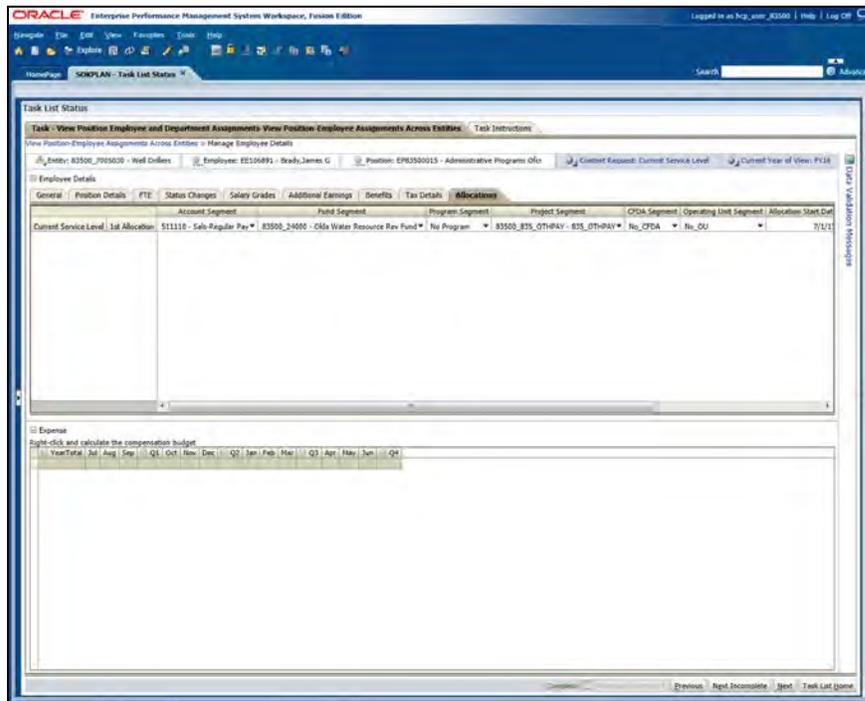
Step	Action
18.	Click the View Position-Employee Assignments Across Entities link. 
19.	<i>Right-click on the employee in the third row</i> <i>E.g.</i> Right-click the Employee 3 object. 
20.	Click the Edit Employee Details menu. 
21.	Click the FTE tab. 



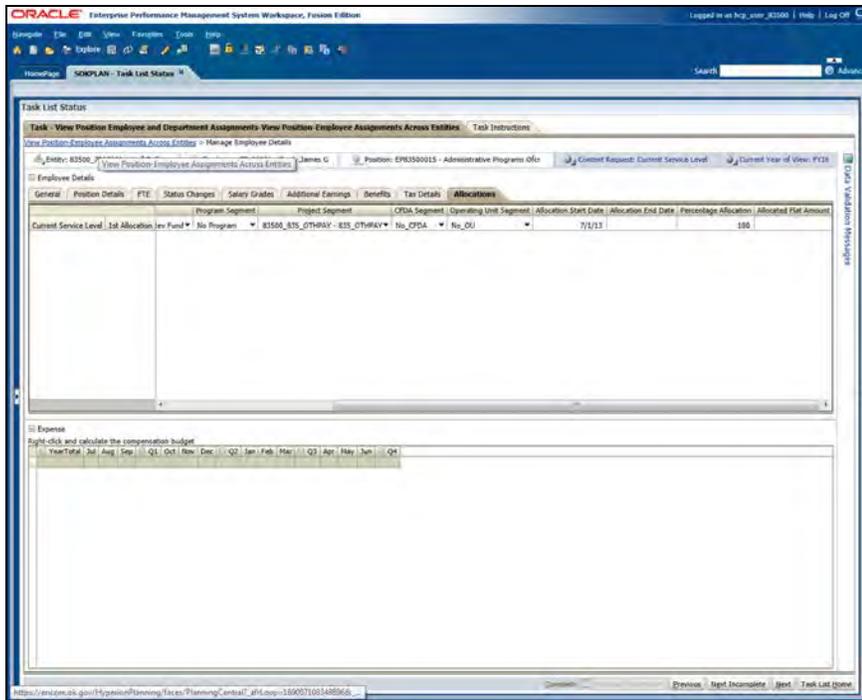
Step	Action		
22.	Note that FTE for the third department is .1		
	<table border="1"> <tr> <td>0.1</td> <td>3/1/13</td> </tr> </table>	0.1	3/1/13
0.1	3/1/13		



Step	Action
23.	Click the Allocations tab. 



Step	Action
24.	Scroll to the right of the form to review the allocation percentage. Note that the allocation percentage is 100%

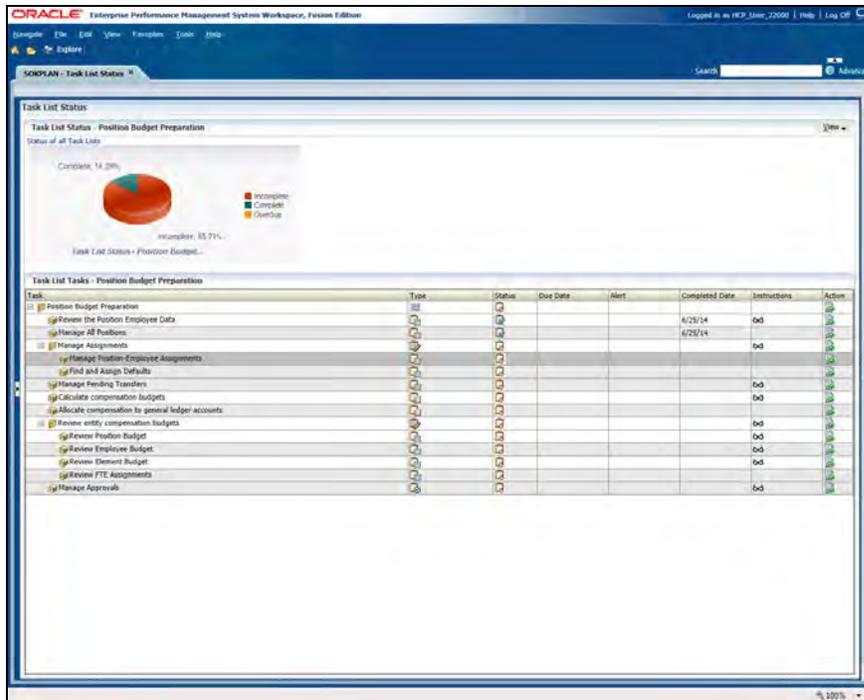


Step	Action
25.	Click the View Position-Employee Assignments Across Entities link. View Position-Employee Assignments Across Entities
26.	Click the Complete option.
27.	Click the Task List Home button. Task List Home
28.	End of Procedure.

3.20 - Manage Position Employee Assignments

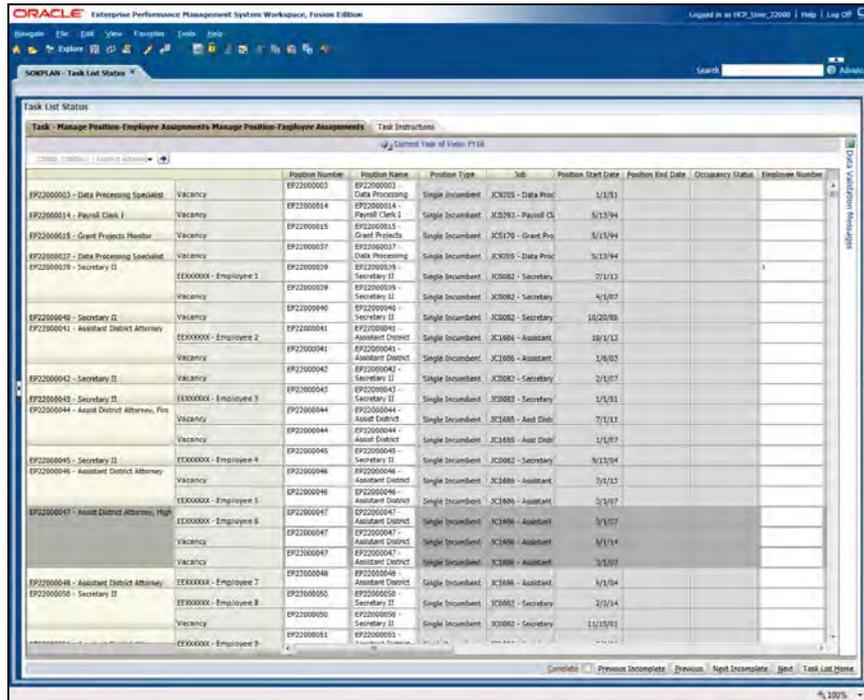
In this topic you will be able to review the positions / employees assignments and updated data for the current department.

Procedure



Step	Action
1.	<p>Start "Manage Position-Employee Assignments" Task</p> <p>Click the Manage Position-Employee Assignments Action button.</p> 

Step	Action
2.	-Review the position employee data for your entity. -Use the vertical scroll bar to navigate through the form



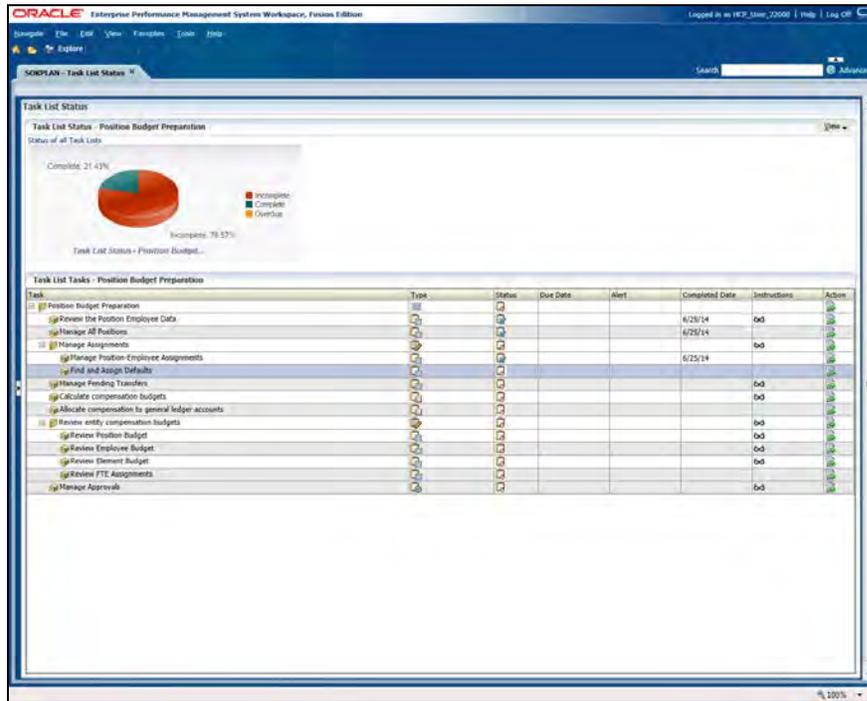
Step	Action
3.	Review the Position, e.g. : EP22000047 and check that employee, e.g.: EE140600 is assigned to it Click in the field. <div style="border: 1px solid black; padding: 2px; width: fit-content;">EEXXXXXX - Employee 6</div>
4.	Complete the "Manage Position-Employee Assignments" Task Click the Complete option. <input type="checkbox"/>
5.	Click the Task List Home button. <div style="border: 1px solid black; padding: 2px; width: fit-content;">Task List Home</div>
6.	End of Procedure.

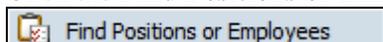
3.21 - Find and Assign Defaults

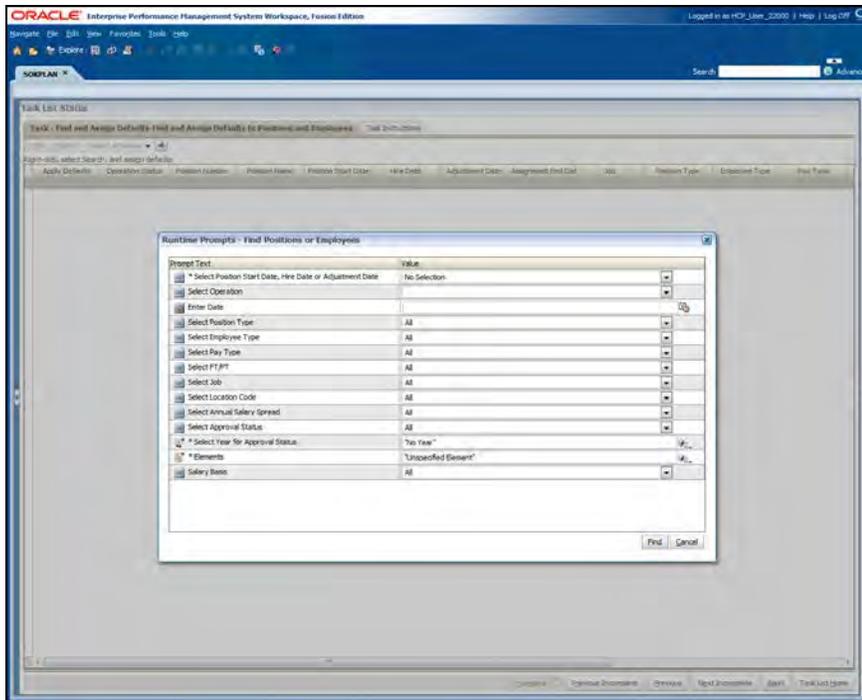
In this topic you will be able to find positions/employees and assign defaults based on criteria and position, for all compensation elements.

You will see a message in the Operation Status column validating the success of the assignments.

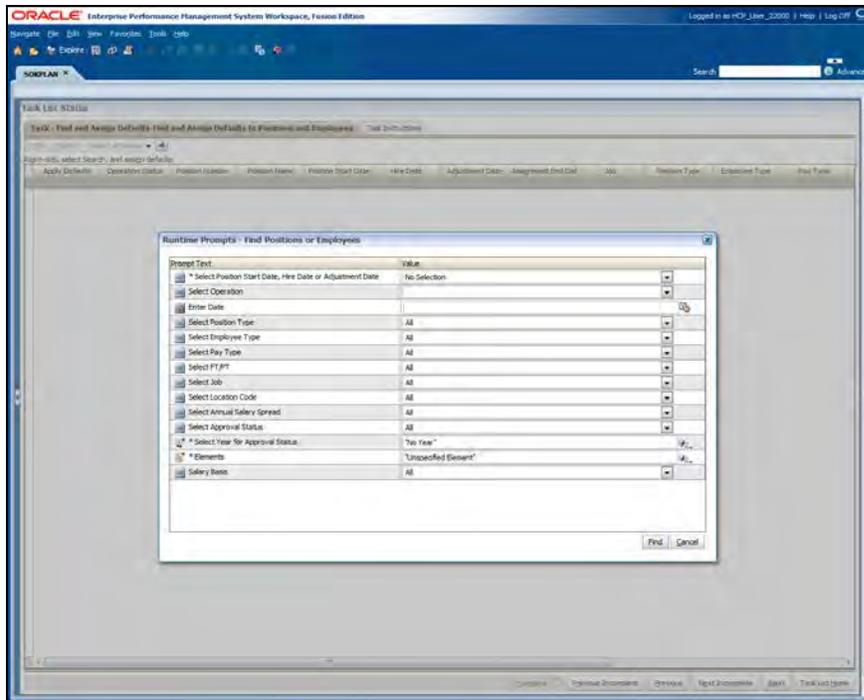
Procedure



Step	Action
1.	<p>Start the "Find and Assign Defaults" Task</p> <p>Click the Find and Assign Defaults Action button.</p> 
2.	<p>Right-click the Row Header cell.</p> 
3.	<p>Click the Search menu.</p> 
4.	<p>Click the Find Positions or Employees menu.</p> 

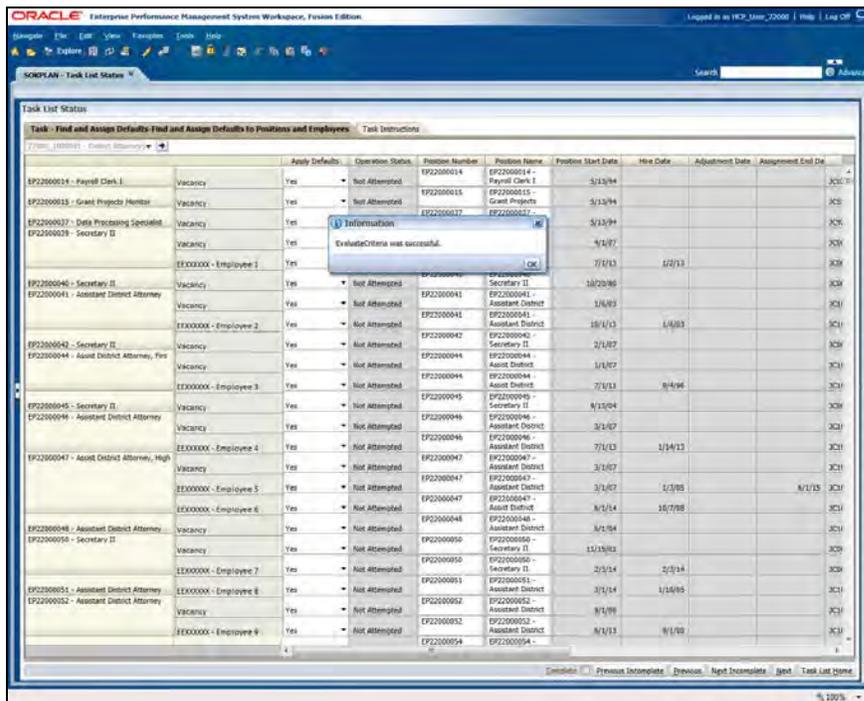


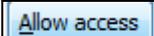
Step	Action
5.	<p>Use the filters to narrow down the search. If you want to get all the positions in a particular DeptID, press "Find" button without making any changes to any of the options.</p> <p>Select following values in order to retrieve all the positions and employees: -Enter/Select values for appropriate fields within the "Find Positions or Employees" tab Select Position Start Date, Hire Date or Adjustment Date: No Selection Select Operation: Leave Blank Enter Date: Leave Blank Select Position Type: All Select Employee Type: All Select Pay Type: All Select FT/PT: All Select Job: All Select Location Code: All Select Union Code: All Select Annual Salary Spread: All Select Approval Status: All Select Year for Approval Status: "No Year" Elements: "Unspecified Element" Salary Basis: All</p> <p style="text-align: center;">Find</p>

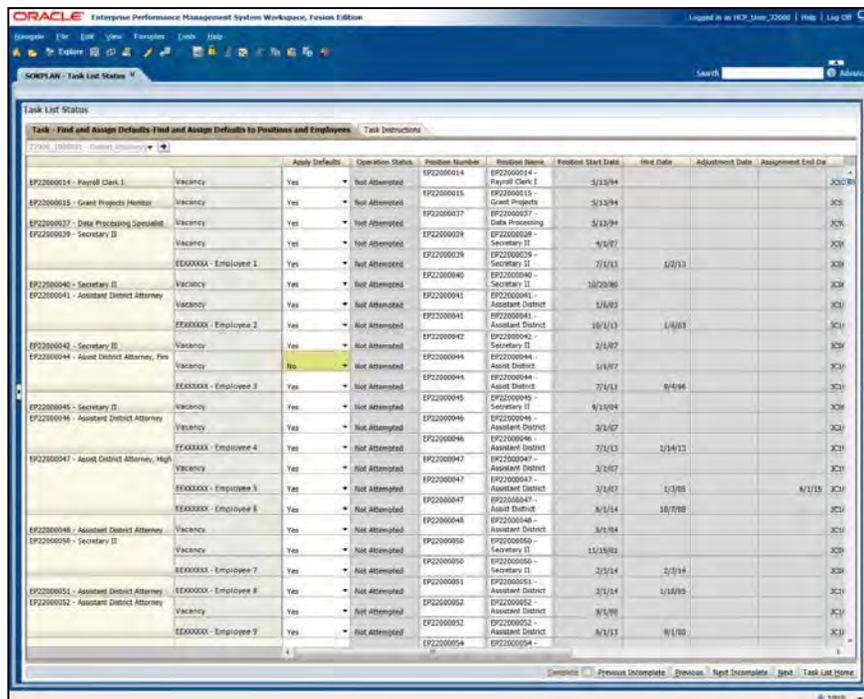


Step	Action
6.	Click the Find button.

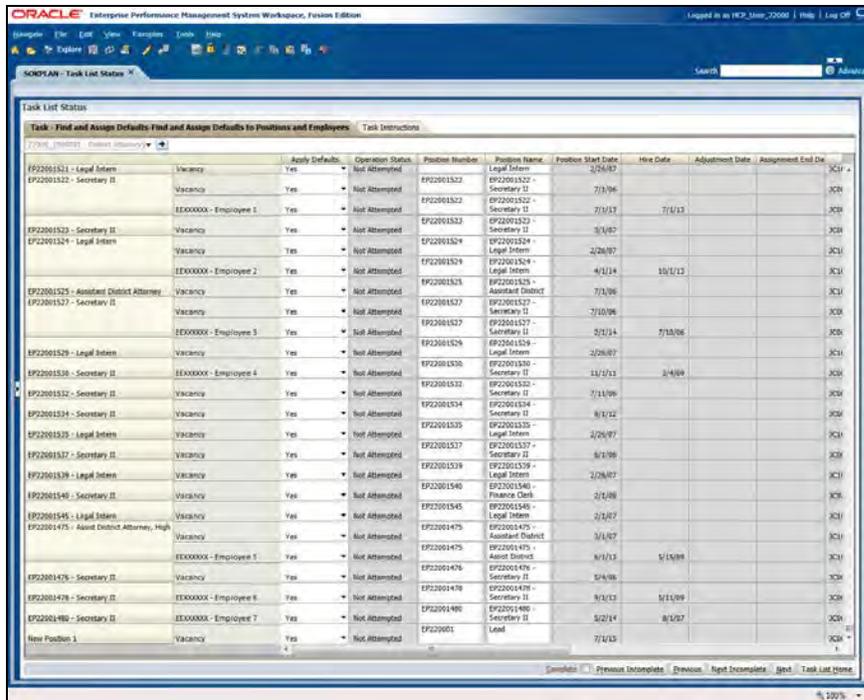
Find

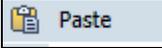
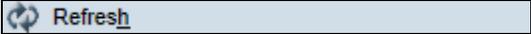


Step	Action
7.	A message appears reading: "EvaluateCriteria was successful." Click the OK button. 
8.	Select 'No' for the Position / Employee you do not want to apply defaults to. [NOTE: "apply default" action applies the change to all position that has Yes in the Apply Defaults column in the form.] Click the Apply Defaults SmartList button. 
9.	Click the No cell. 
10.	Click the Apply Defaults cell. 
11.	Press [Ctrl+C] .
12.	Click the Apply Defaults cell. 

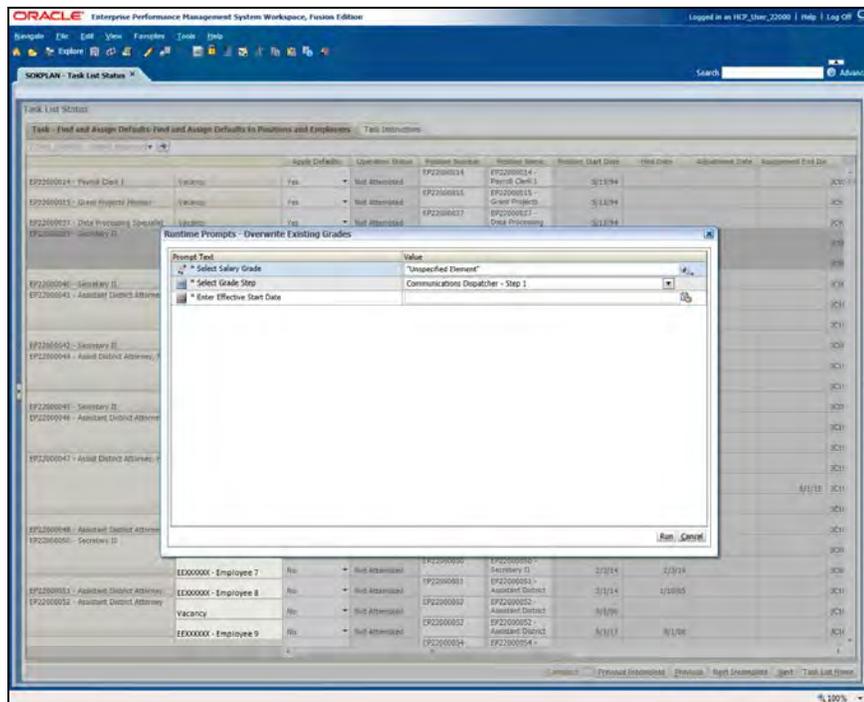


Step	Action
13.	Use the vertical scroll bar to scroll to the bottom of the page.

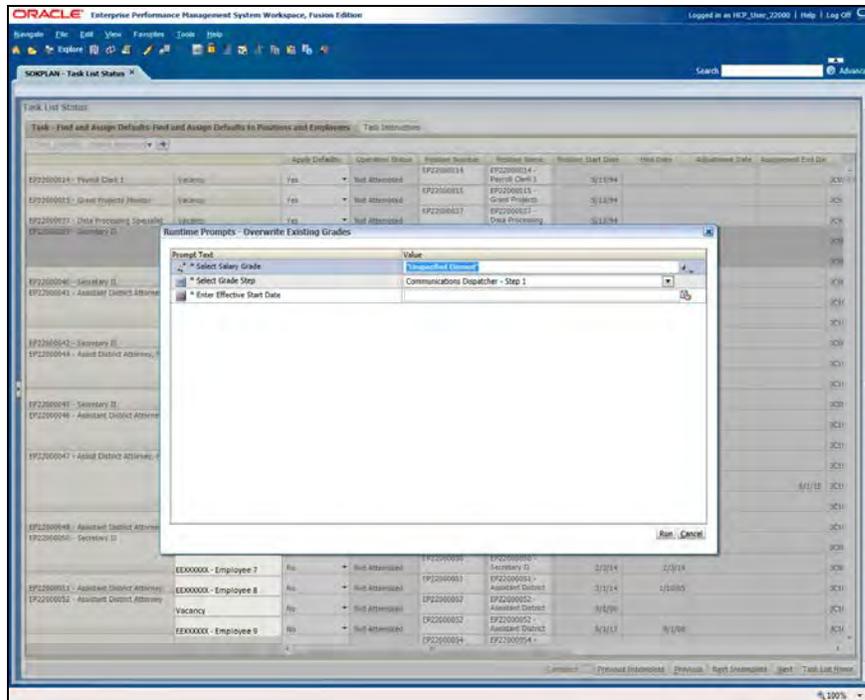


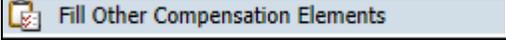
Step	Action
14.	<p><i>*Press and hold the [Shift] key and click on the Apply Defaults cell in the last row.</i></p> <p>Press the [Shift] key and click the Apply Defaults cell.</p> 
15.	<p><i>*Right-click on Yes cell in the Apply Defaults column</i></p> <p>Right-click the Apply Defaults cell.</p> 
16.	<p>Click the Edit->Paste menu.</p> 
17.	<p>Click the File menu.</p> 
18.	<p>Click the Save menu.</p> 
19.	<p>Click the View menu.</p> 
20.	<p>Click the Refresh menu.</p> 
21.	<p><i>E.g.:</i></p> <p>Right-click the EP2200039 - Secretary II row header.</p>

Step	Action
22.	Click the Salary Grade Defaults->Overwrite Salary Grades menu.  Overwrite Salary Grades

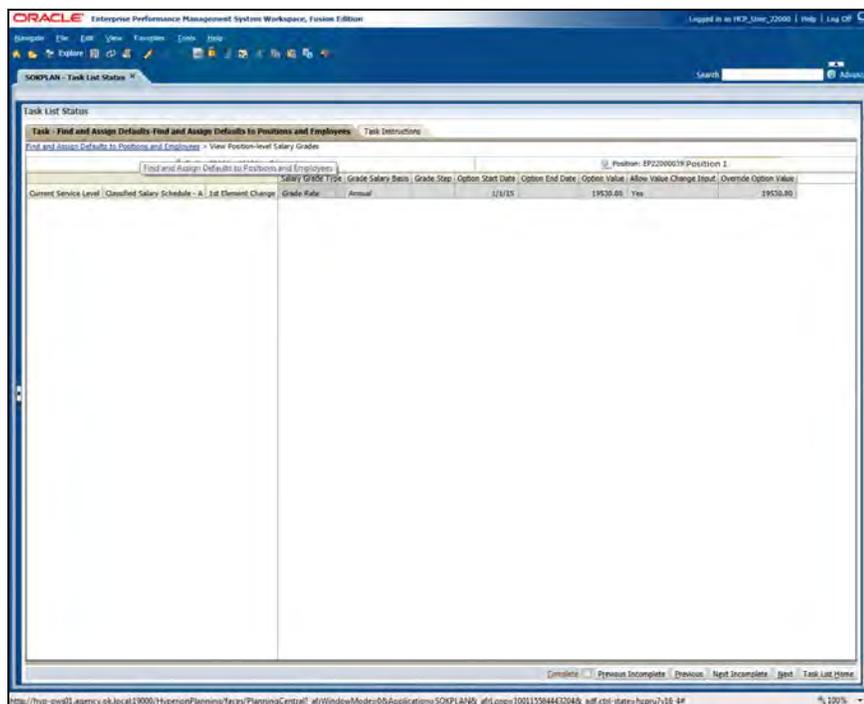


Step	Action
23.	- Select the following Values: Select Salary Grade: "CLAS-A" Select Grade Step: Communication Dispatcher - Step 1 Enter Effective Start Date: 1/1/15

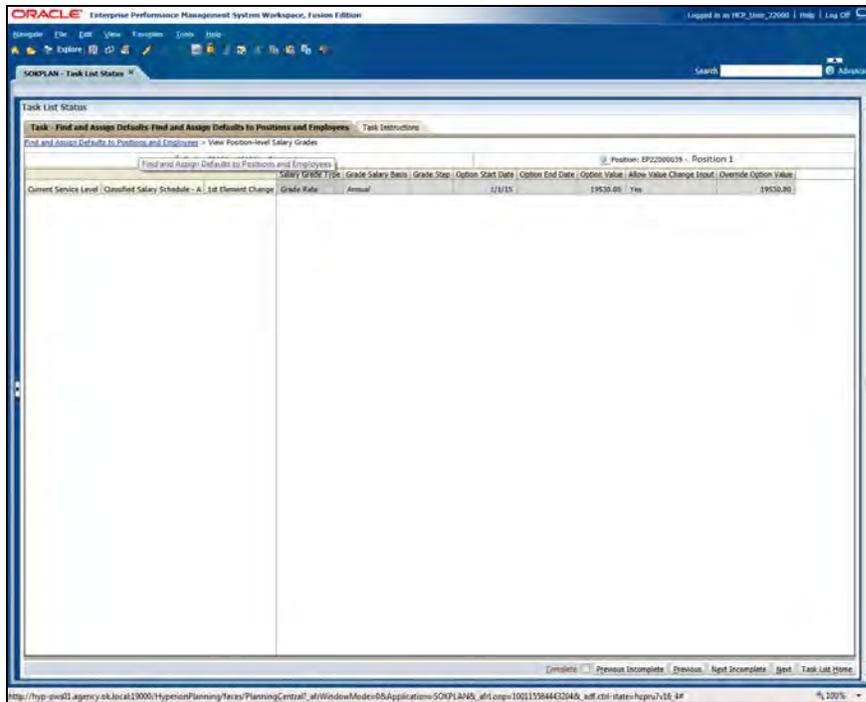


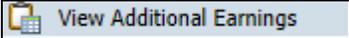
Step	Action
24.	Enter the desired information into the Enter Salary Grade field. Enter " CLAS-A ".
25.	Enter the desired information into the Enter Effective Start Date field. Enter " 1/1/15 ".
26.	Click the Run button. 
27.	A message displays reading: "CriteriaOverWriteSalElement was successful." Click the OK button. 
28.	E.g.: Right-click the EP22000039 - Secretary II row header.
29.	Click the Other Compensation Defaults menu. 
30.	Click the Fill Other Compensation Elements menu. 
31.	Enter the desired information into the Select Other Compensation Element field. Enter " SRTS ".
32.	Click the Select Option list.
33.	Click the Self Only list item.
34.	Enter the desired information into the Enter Effective Date field. Enter " 1/1/15 ".

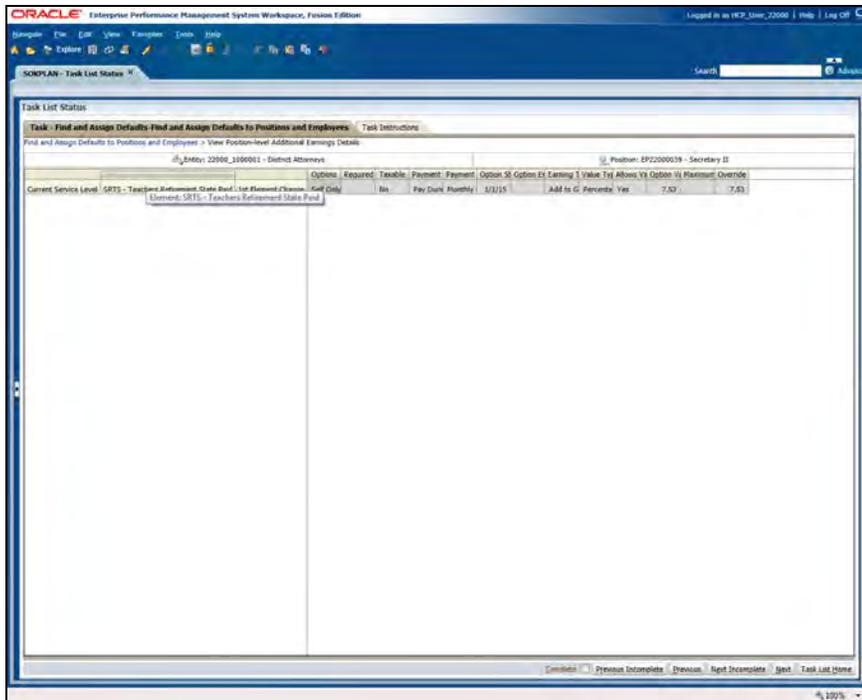
Step	Action
35.	Click the Run button. 
36.	A message displays reading " <i>CriteriaCreateMissingNonSalElement was successful.</i> " Click the OK button. 
37.	<i>E.g.:</i> Right-click the EP22000039 - Secretary II row header.
38.	Click the View Position Details->View Salary Grades menu. 



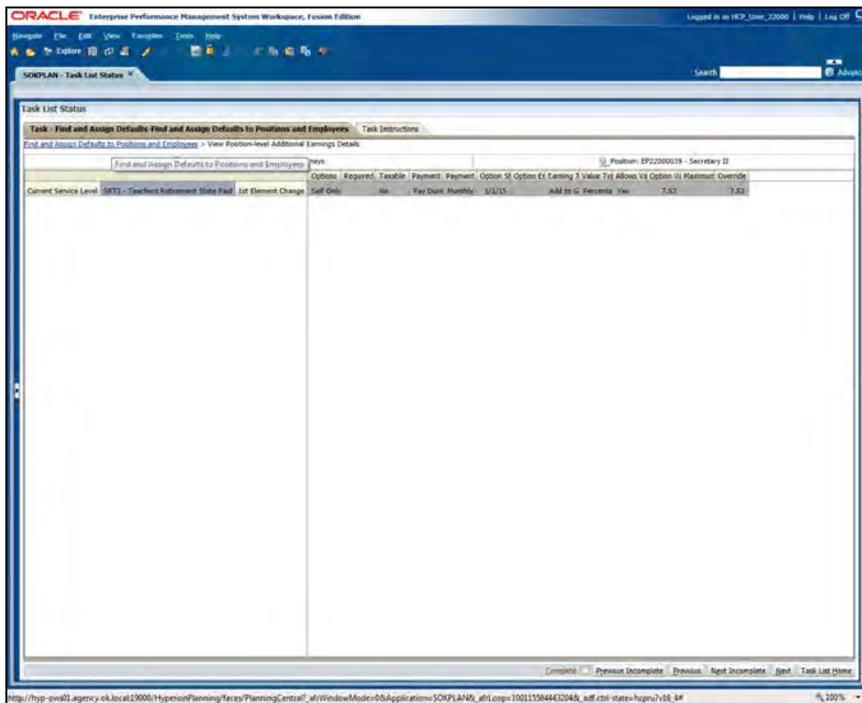
Step	Action
39.	<i>Salary A is the new Grade type for the position.</i>

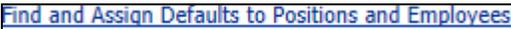
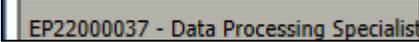
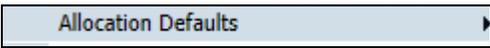


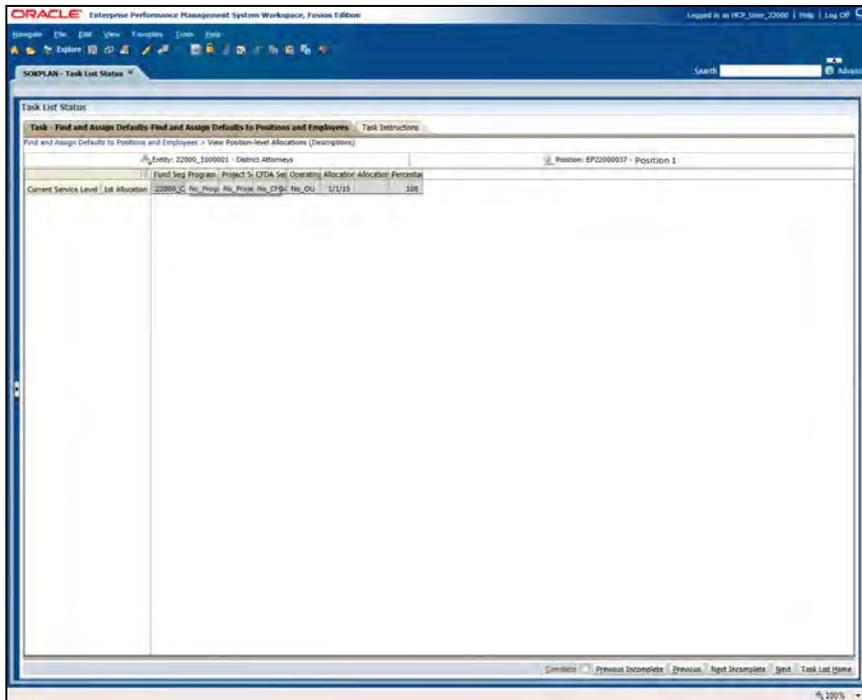
Step	Action
40.	Click the Find and Assign Defaults to Positions and Employees link. Find and Assign Defaults to Positions and Employees
41.	Right-click the Position row header.
42.	Click the View Position Details->View Additional Earnings menu. 



Step	Action
43.	<i>SRTS is added to the additional earnings</i> <div style="border: 1px solid black; padding: 2px; display: inline-block;">SRTS - Teachers Retirement State Paid</div>

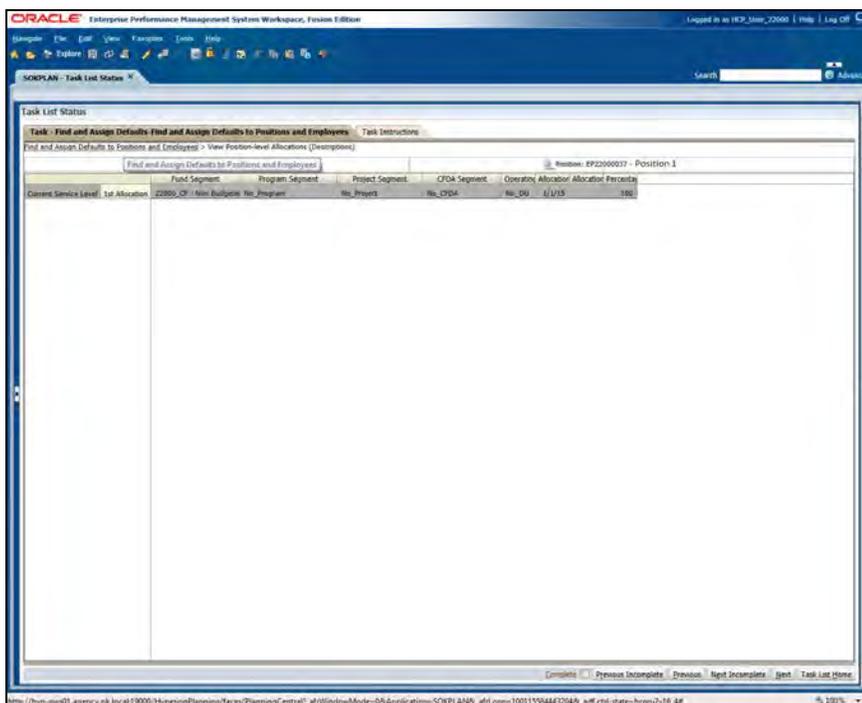


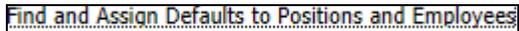
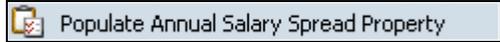
Step	Action
44.	Click the Find and Assign Defaults to Positions and Employees link. 
45.	Right-click the Position object. 
46.	Click the Allocation Defaults menu. 
47.	Note: Please select “Overwrite with Default Allocations” if the position already has an allocation line in it. To check if the position has allocations defined or not – Go to: right click View Position Details-> View Allocations Click the Fill with Default Allocations menu. 
48.	Enter the desired information into the Enter Effective Start Date field. Enter " 1/1/15 ".
49.	<i>Leave the 'Enter Effective End Date' as blank.</i> Click the Run button. 
50.	<i>A message displays reading "CriteriaCreateMissingDistributions was successful."</i> Click the OK button. 
51.	<i>E.g.:</i> Right-click the EP22000037 - Data Processing Specialist row header. 
52.	Click the View Position Details menu. 
53.	Click the View Allocations menu. 

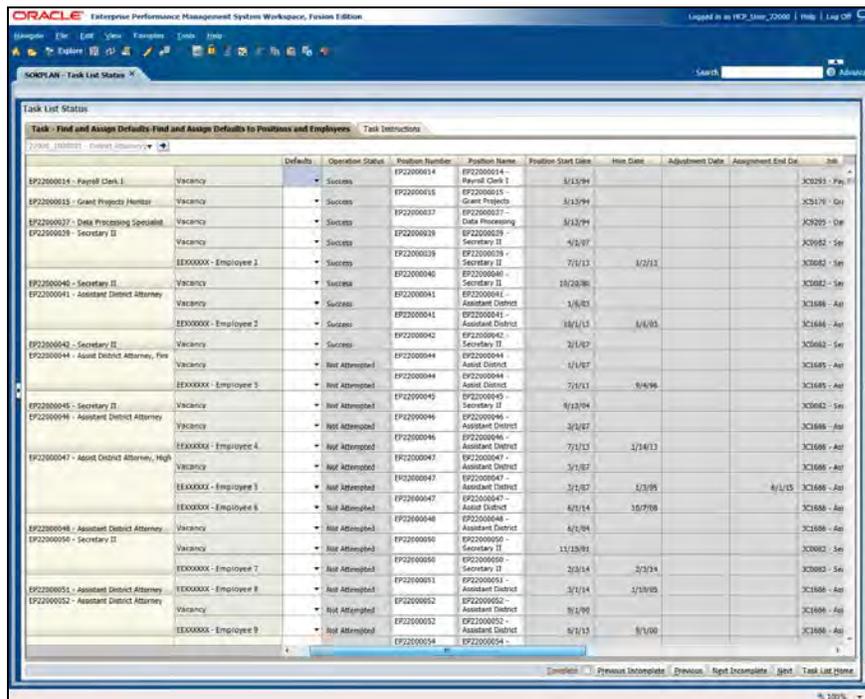


Step	Action
54.	<i>Expand the Segment Columns as required to view the data.</i>
55.	<i>Review the default allocation that gets added to the employee/ position.</i>

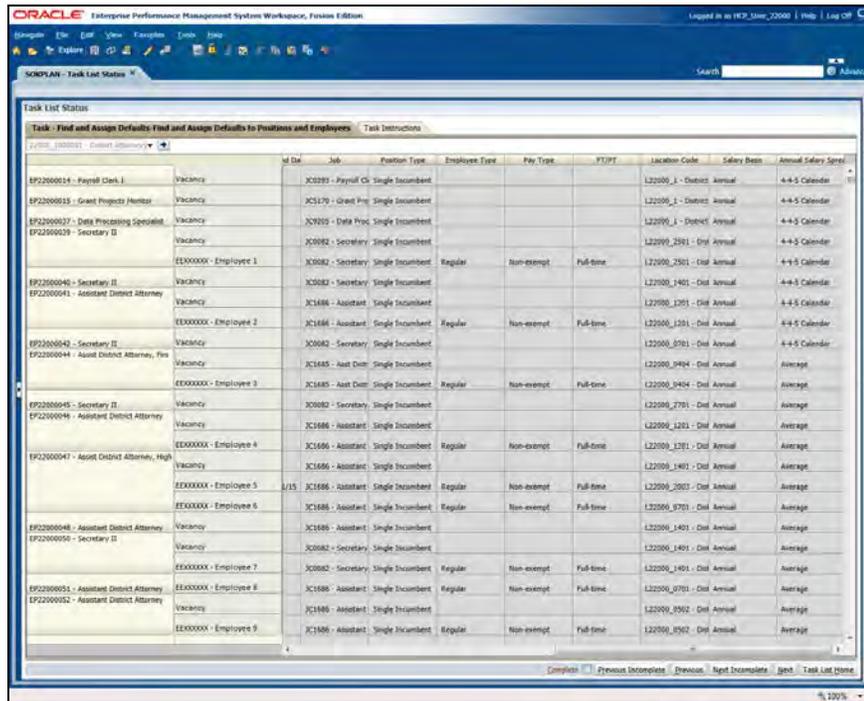
Current Service Level	1st Allocation
-----------------------	----------------



Step	Action
56.	Click the Find and Assign Defaults to Positions and Employees link. 
57.	<i>E.g.:</i> Right-click the EP22000039 - Secretary II row header.
58.	Click the Populate Annual Salary Spread Property menu. 
59.	Click the Select Annual Salary Spread list.
60.	Click the 4-4-5 Calendar list item.
61.	Click the Fill button. 
62.	A message displays reading "CriteriaCreateMissingDistributions was successful." Click the OK button. 



Step	Action
63.	Use the horizontal scroll bar to scroll to the right of the form
64.	Review the Annual Salary Spread 

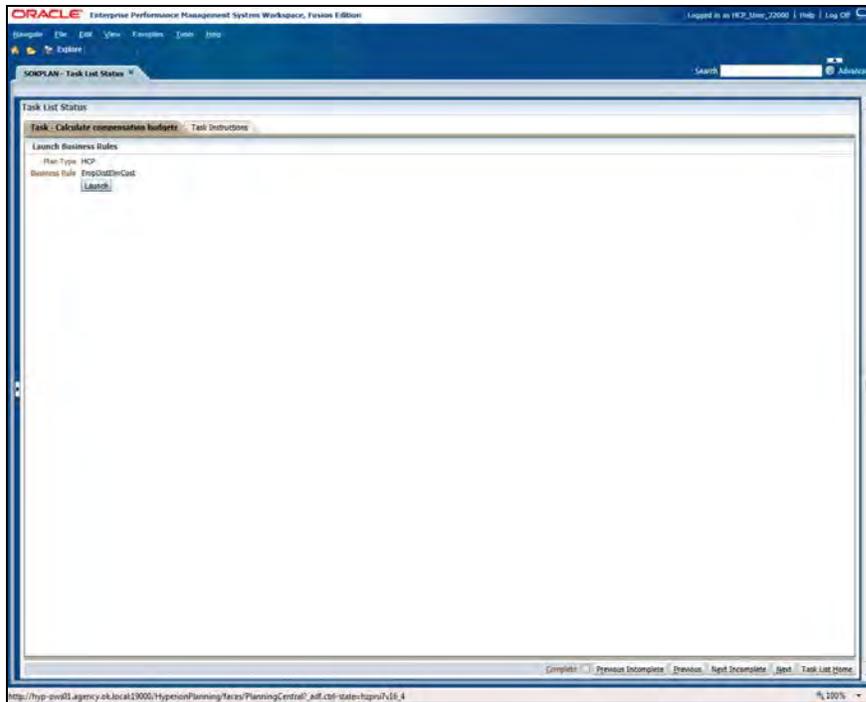


Step	Action
65.	<p>Complete the "Find and Assign Defaults" Task</p> <p>Click the Complete option.</p>
66.	<p>Click the Next button.</p> <p>Next</p>
67.	<p>End of Procedure.</p>

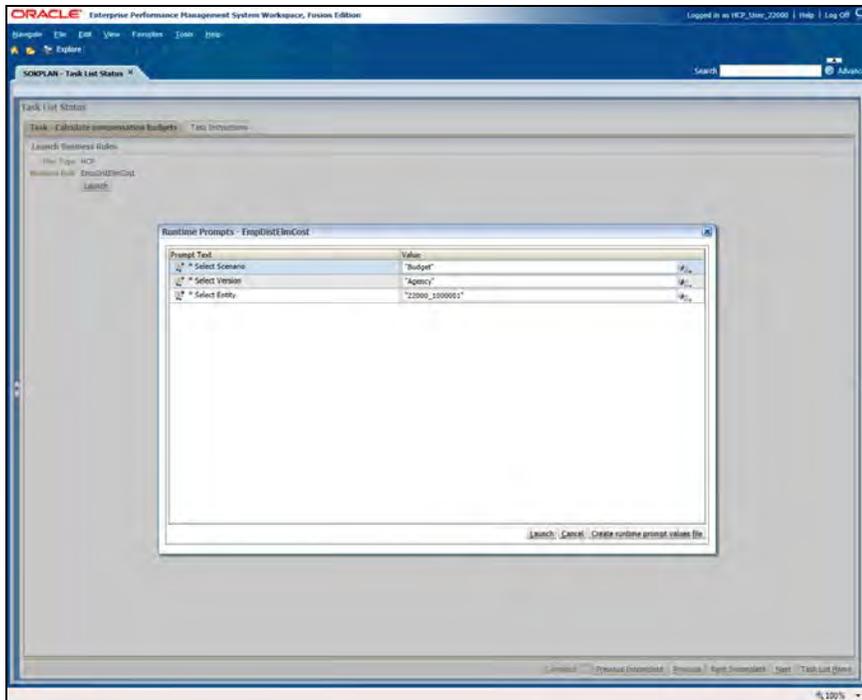
3.22 - Calculate Compensation Budgets

After making all desired updates in earlier scripts, in this topic you will set off the business rule to calculate the compensation budget amounts, for the current department. The Job Console will show the current job, and after refreshing by the tester, will show successfulness of the business rule.

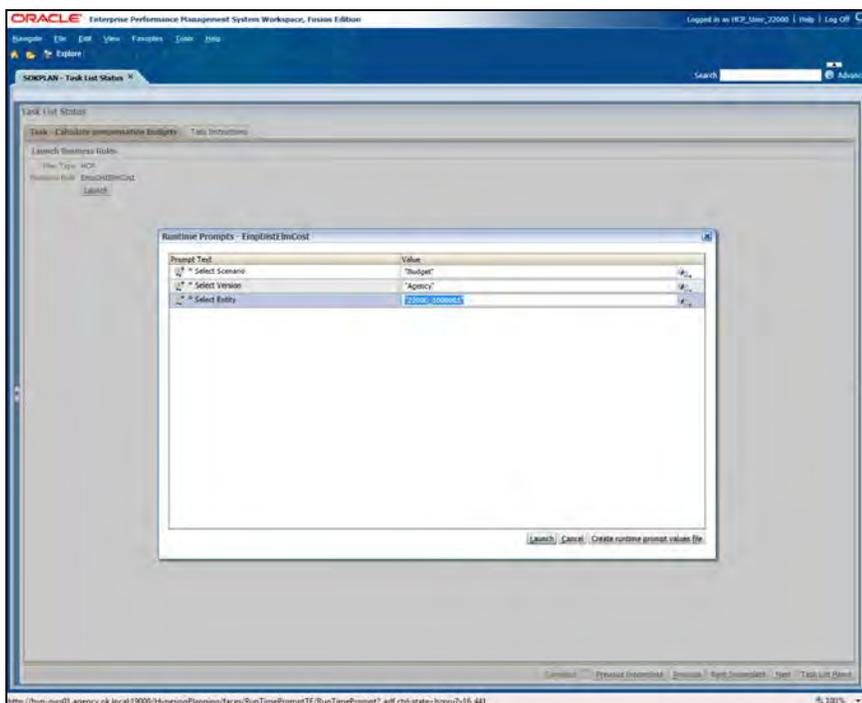
Procedure

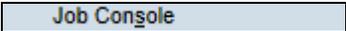
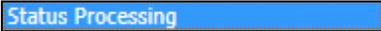


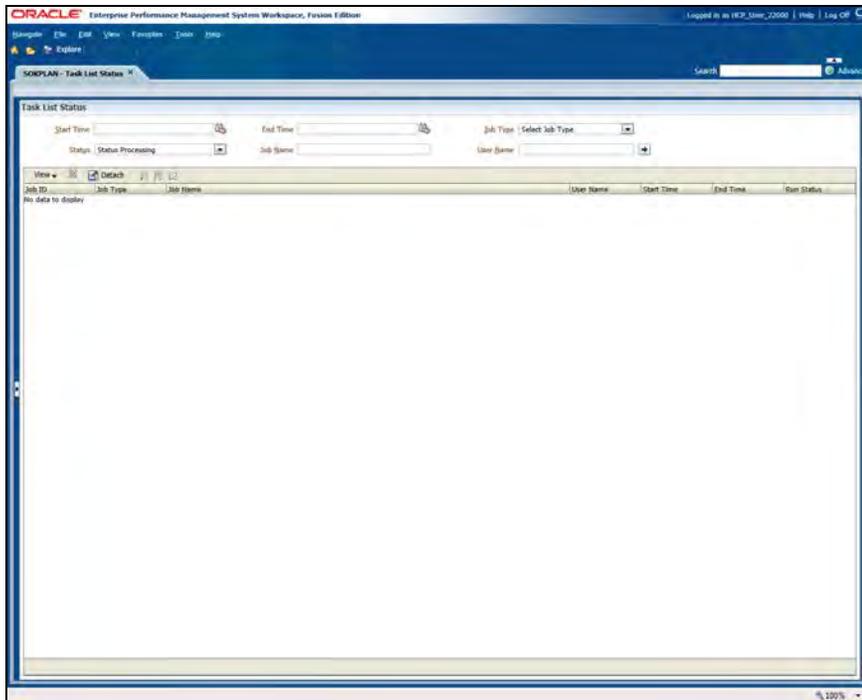
Step	Action
1.	<p data-bbox="435 982 1414 1077"><i>If you had clicked "Next" on the previous script, you would end up on this page. If you are not on this page, please launch the "Calculation Compensation Budgets" task</i></p> <p data-bbox="435 1115 740 1146">Click the Launch button.</p> <p data-bbox="440 1150 532 1182">Launch</p>



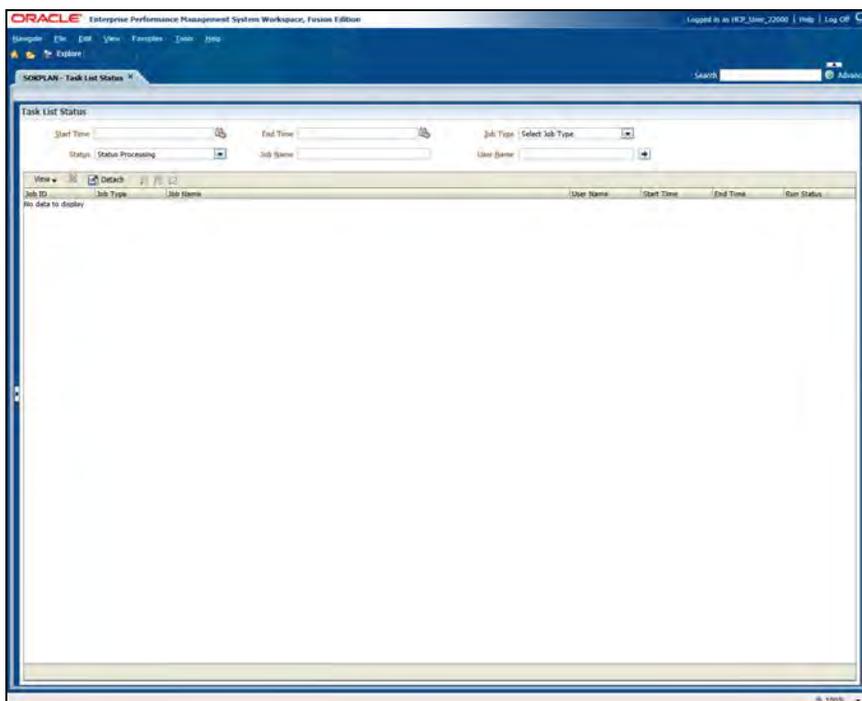
Step	Action
2.	<i>Enter/Review the values: Select Scenario: "Budget" Select Version: "Agency" Select Entity: "22000_1000001"</i>

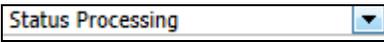


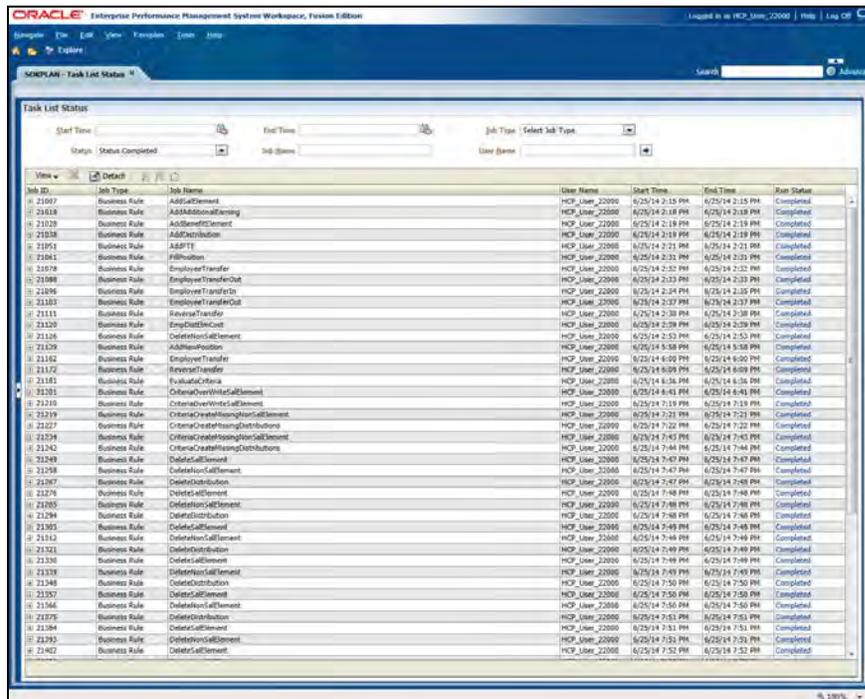
Step	Action
3.	Click the Launch button. 
4.	<i>-In case, the Business Rule exceeds the timeout limit, an error message is displayed</i> Click the OK button. 
5.	<i>Job Console is a console where users can view list of all the calculations launched by them. Users can also check the status of the calculations that exceeded the maximum time limit.</i> <i>Review the Job Console</i> Click the Tools menu. 
6.	Click the Job Console menu. 
7.	<i>Navigate to the "Status" field (bottom leftmost field)</i> Click the Status list. 
8.	Click the Status Processing list item. 
9.	Click the Go button. 
10.	<i>Notice the rule is still running</i> <i>Try again after few minutes</i> Click the Go button. 



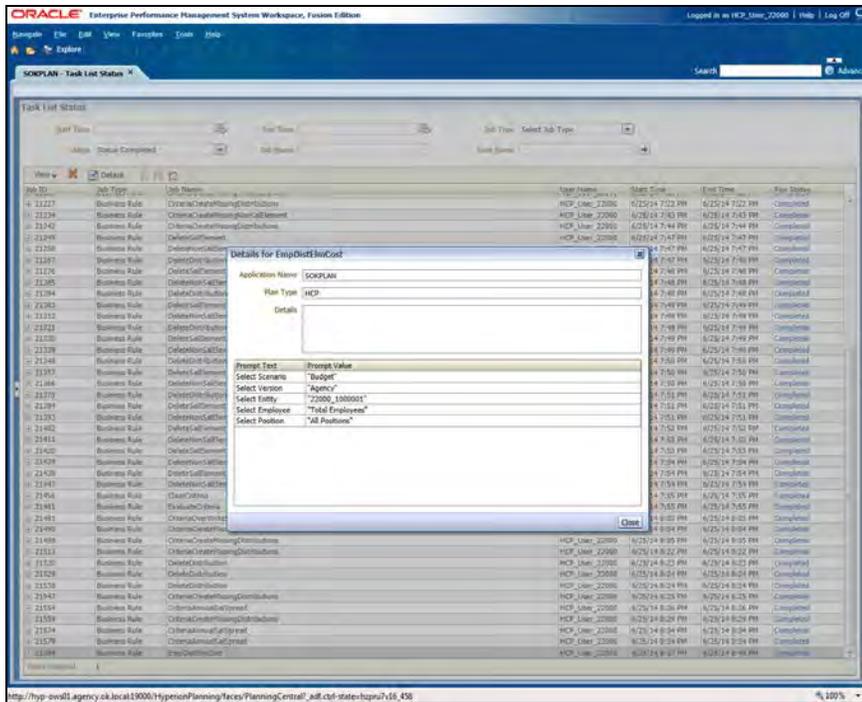
Step	Action
11.	<p data-bbox="342 982 1247 1014"><i>-The calculation has completed and the run status has changed to Completed</i></p> <p data-bbox="342 1052 1219 1108"><i>-[NOTE: Perform steps 7-9 changing step 8 to "Completed" to view all the completed jobs]</i></p>



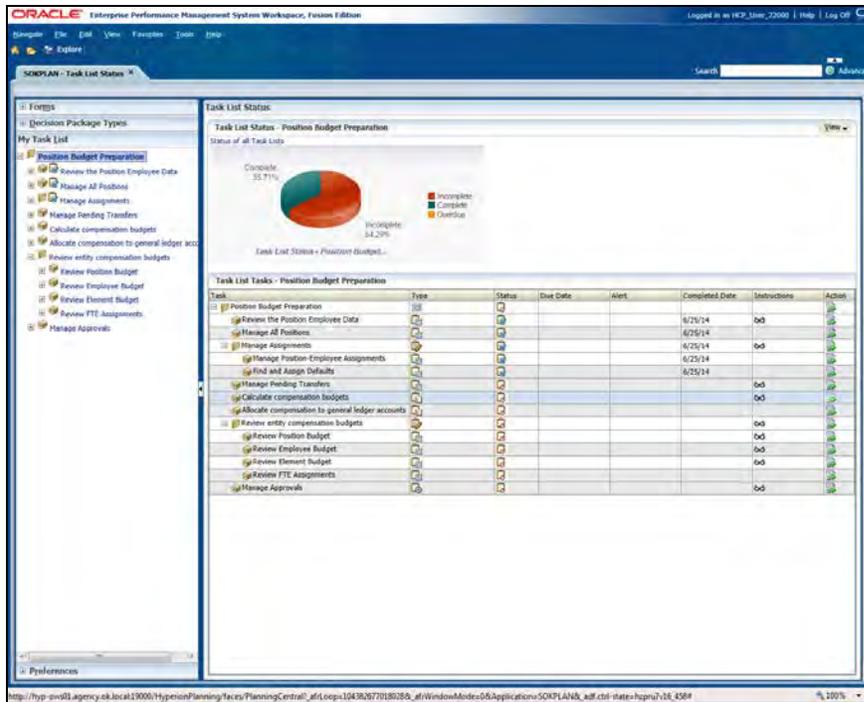
Step	Action
12.	Click the Status list. 
13.	Click the Status Completed list item. 
14.	Click the Go button. 



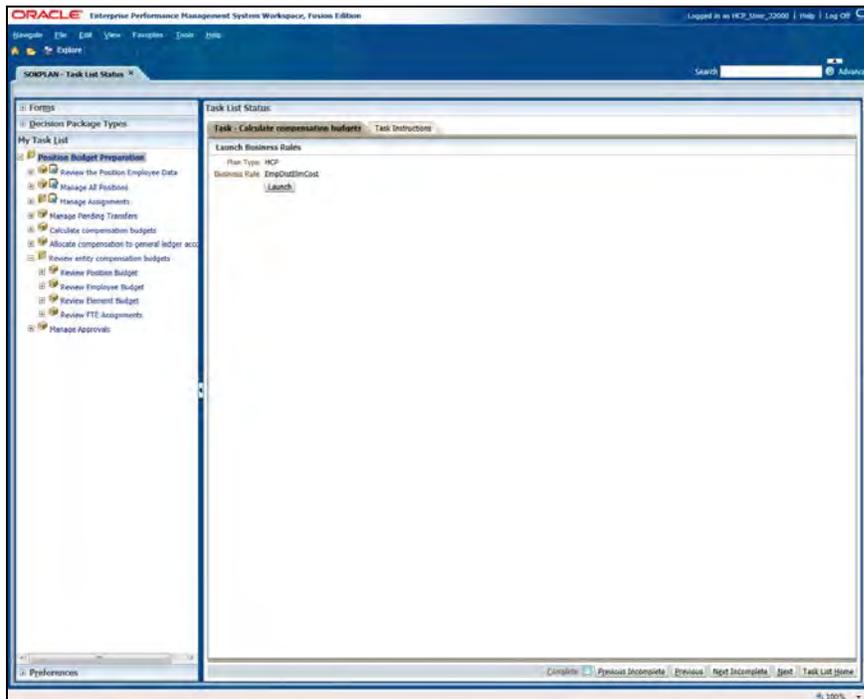
Step	Action
15.	Use the vertical scroll to scroll to the bottom of the page
16.	-Verify that the <u>Run Status</u> for the job "EmpDistElmCost" is completed. -Click on "Completed" 

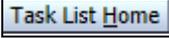


Step	Action
17.	<p>Review the summary information for the rule that was ran</p> <p>Click the Close button.</p> 
18.	<p>Unhide the View Pane (if it is currently hidden)</p> <p>Click the Restore Pane button.</p> 
19.	<p>Click the Position Budget Preparation object.</p> 



Step	Action
20.	Click the Calculate compensation budgets Action button.



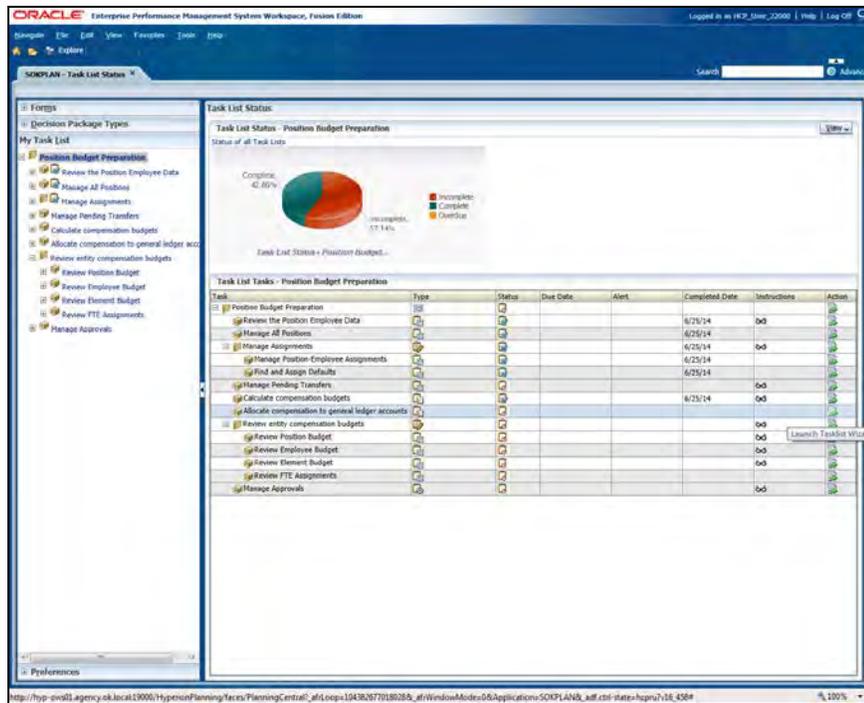
Step	Action
21.	Complete the "Calculate compensation budgets" Task Click the Complete option.
22.	Click the Task List Home button. 
23.	End of Procedure.

3.23 - Allocate Compensation to General Ledger Accounts

After getting success in script 3.22, calculating compensation budgets, in this topic you will launch the business rule to allocate the budget amounts to the proper general ledger accounts, for the current department.

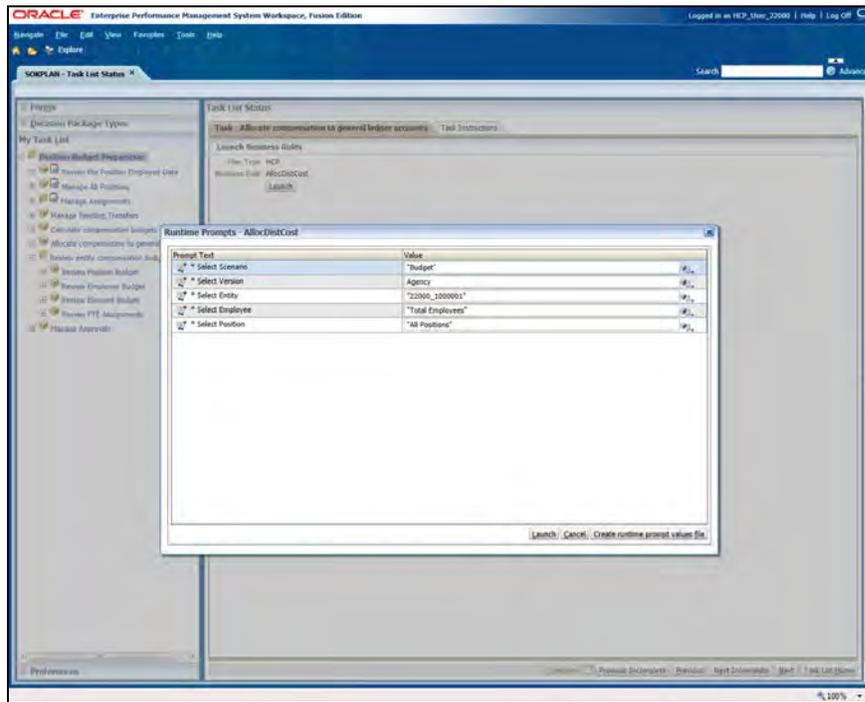
The business rule returns “AllocDistCost Rule was run successfully”.

Procedure



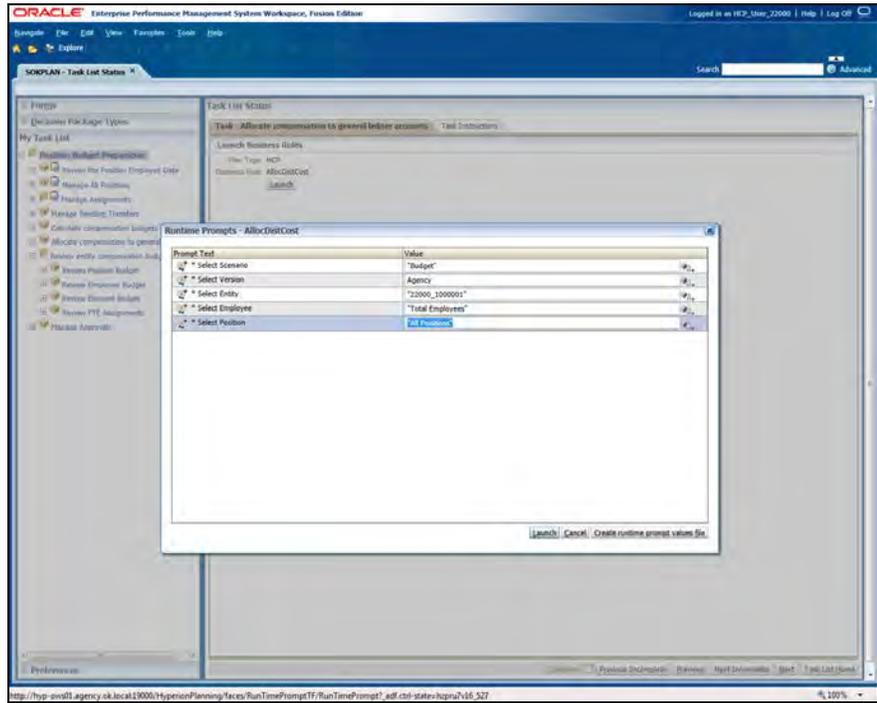
Step	Action
1.	Navigate to the "Allocate compensation to general ledger accounts" Task Click the Allocate compensation to general ledger accounts Action button. 

Step	Action
2.	<p>Launch the business rule</p> <p>Click the Launch button.</p> 



Step	Action
3.	<p>The following fields should be prepopulated with data. If not:</p> <p>Select Values</p> <p>-Enter the following values:</p> <p>Select Scenario: Budget</p> <p>Select Version: Agency</p> <p>Select Entity, e.g.: 22000_1000001</p> <p>Select Employee: Total Employees</p> <p>Select Position: All Positions</p> <p>-Click the "Launch" button</p>
4.	Review " Budget " is entered for the <u>Select Scenario</u> field (if not entered, enter it now)
5.	Review " Agency " is entered for the <u>Select Version</u> field (if not entered, enter it now)
6.	Review "Agency e.g. 22000_1000001 " is entered for the <u>Select Entity</u> field (if not entered, enter it now)

Step	Action
7.	Review " Total Employees " is entered for the <u>Select Employee</u> field (if not entered, enter it now)
8.	Review " All Positions " is entered for the <u>Select Position</u> field (if not entered, enter it now)

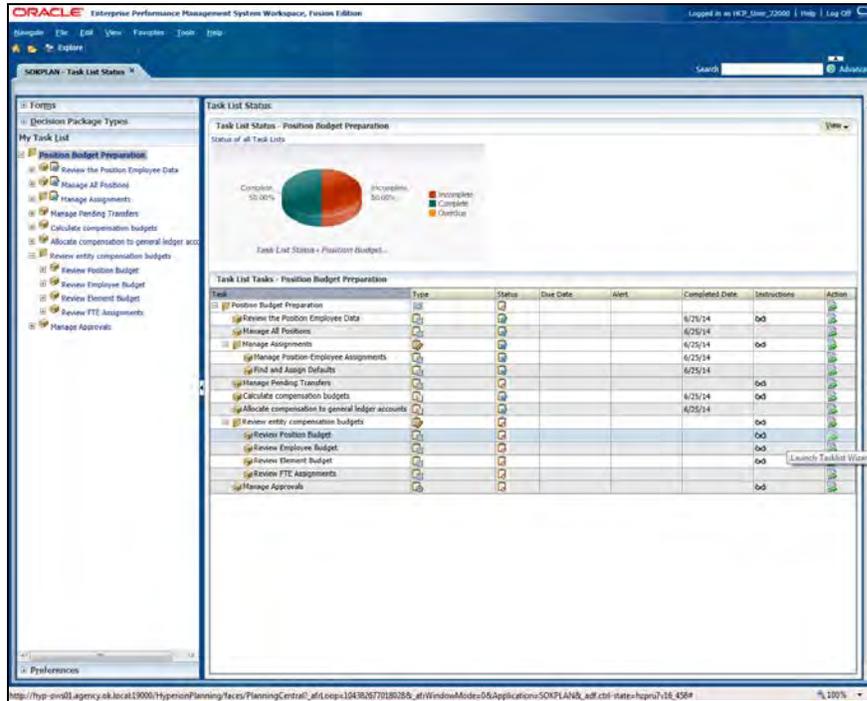


Step	Action
9.	Click the Launch button. 
10.	A message appears reading "AllocDistCost Rule was run successfully " Click the OK button. 
11.	Complete the <i>Allocate Compensation to General Ledger Accounts</i> Click the Complete option.
12.	Click the Task List Home button. 
13.	End of Procedure.

3.24 - Review Position Budget

In this topic you will be able to review the HCP data / budgets (for positions) by year, quarters.

Procedure



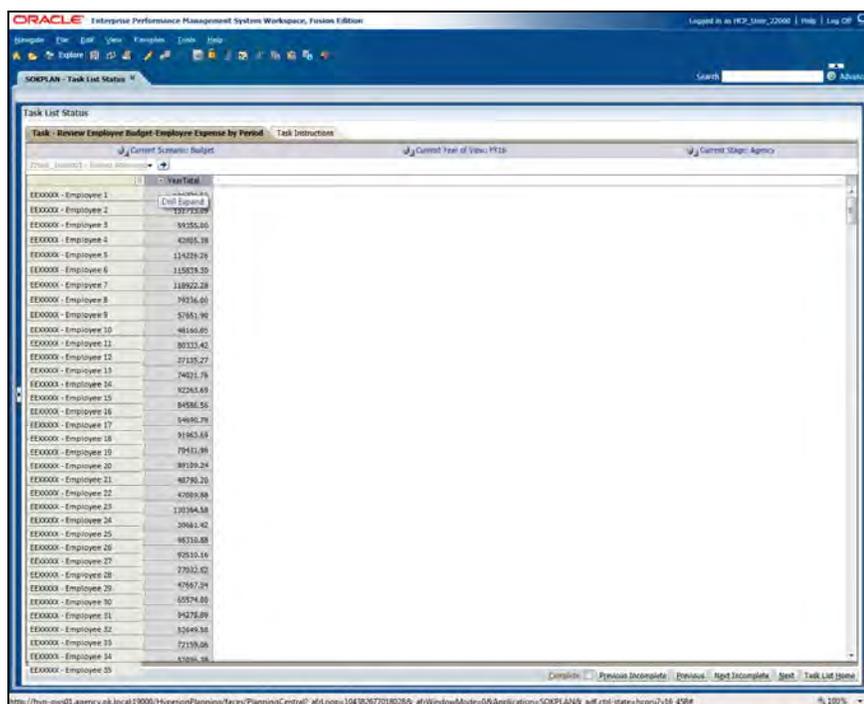
Step	Action
1.	Click the Review Position Budget Action button. 
2.	Click the Collapse Pane button. 
3.	<i>View data at the "Year Total" summary level</i> Click the Year Total Collapse button. 
4.	<i>In order to review the whole form, expand (if not already expanded) the "Year Total" column</i> Click the Year Total Expand button. 
5.	<i>View data at by months by expanding the appropriate quarter</i> <i>-e.g. Q1</i> Click the Q1 Expand button. 

Step	Action
6.	Complete "Review Position Budget" Task Click the Complete option.
7.	Click the Next button. 
8.	End of Procedure.

3.25 - Review Employee Budget

In this topic you will be able to review the HCP data / budgets (for employees) by year, quarters.

Procedure



Step	Action
1.	In order to review the whole form, expand (if not already expanded) the "Year Total" column Click the Year Total Expand button. 

	YearTotal	Q1	Q2	Q3	Q4
ED0000 - Employee 1	201771.52	25442.88	25442.88	25442.88	25442.88
ED0000 - Employee 2	137713.00	32928.27	32928.27	32928.27	32928.27
ED0000 - Employee 3	93555.65	14838.75	14838.75	14838.75	14838.75
ED0000 - Employee 4	42885.38	10701.35	10701.35	10701.35	10701.35
ED0000 - Employee 5	114328.29	28956.57	28956.57	28956.57	28956.57
ED0000 - Employee 6	115879.35	28958.83	28958.83	28958.83	28958.83
ED0000 - Employee 7	118922.28	29726.57	29726.57	29726.57	29726.57
ED0000 - Employee 8	79236.60	19809.65	19809.65	19809.65	19809.65
ED0000 - Employee 9	57661.90	14412.98	14412.98	14412.98	14412.98
ED0000 - Employee 10	48166.65	12040.61	12040.61	12040.61	12040.61
ED0000 - Employee 11	80333.42	20083.35	20083.35	20083.35	20083.35
ED0000 - Employee 12	27135.27	6783.82	6783.82	6783.82	6783.82
ED0000 - Employee 13	74211.78	18503.44	18503.44	18503.44	18503.44
ED0000 - Employee 14	82263.63	20585.92	20585.92	20585.92	20585.92
ED0000 - Employee 15	84586.56	21148.64	21148.64	21148.64	21148.64
ED0000 - Employee 16	94680.78	23672.70	23672.70	23672.70	23672.70
ED0000 - Employee 18	91963.69	22966.92	22966.92	22966.92	22966.92
ED0000 - Employee 19	79411.96	19677.99	19677.99	19677.99	19677.99
ED0000 - Employee 20	89109.24	22277.31	22277.31	22277.31	22277.31
ED0000 - Employee 21	48780.20	12197.55	12197.55	12197.55	12197.55
ED0000 - Employee 22	42890.88	10702.47	10702.47	10702.47	10702.47
ED0000 - Employee 23	120364.88	30091.15	30091.15	30091.15	30091.15
ED0000 - Employee 24	39681.42	9865.35	9865.35	9865.35	9865.35
ED0000 - Employee 25	86330.88	21577.72	21577.72	21577.72	21577.72
ED0000 - Employee 26	82616.16	20627.54	20627.54	20627.54	20627.54
ED0000 - Employee 27	27932.62	6983.13	6983.13	6983.13	6983.13
ED0000 - Employee 28	47667.24	11916.89	11916.89	11916.89	11916.89
ED0000 - Employee 29	65274.60	16393.50	16393.50	16393.50	16393.50
ED0000 - Employee 30	94278.89	23566.72	23566.72	23566.72	23566.72
ED0000 - Employee 32	93649.58	23462.40	23462.40	23462.40	23462.40
ED0000 - Employee 33	72159.66	18039.77	18039.77	18039.77	18039.77
ED0000 - Employee 34	62088.38	15526.18	15526.18	15526.18	15526.18
ED0000 - Employee 35					

Step	Action
2.	Review form. Use the scroll bar to navigate through the form.

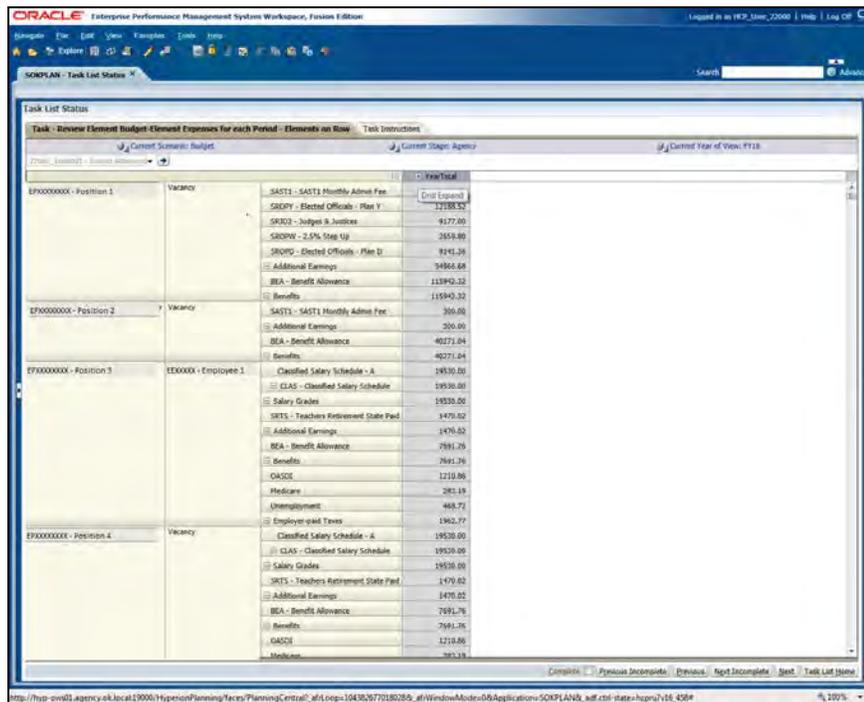
	YearTotal	Q1	Q2	Q3	Q4
ED0000 - Employee 1	201771.52	25442.88	25442.88	25442.88	25442.88
ED0000 - Employee 2	137713.00	32928.27	32928.27	32928.27	32928.27
ED0000 - Employee 3	93555.65	14838.75	14838.75	14838.75	14838.75
ED0000 - Employee 4	42885.38	10701.35	10701.35	10701.35	10701.35
ED0000 - Employee 5	114328.29	28956.57	28956.57	28956.57	28956.57
ED0000 - Employee 6	115879.35	28958.83	28958.83	28958.83	28958.83
ED0000 - Employee 7	118922.28	29726.57	29726.57	29726.57	29726.57
ED0000 - Employee 8	79236.60	19809.65	19809.65	19809.65	19809.65
ED0000 - Employee 9	57661.90	14412.98	14412.98	14412.98	14412.98
ED0000 - Employee 10	48166.65	12040.61	12040.61	12040.61	12040.61
ED0000 - Employee 11	80333.42	20083.35	20083.35	20083.35	20083.35
ED0000 - Employee 12	27135.27	6783.82	6783.82	6783.82	6783.82
ED0000 - Employee 13	74211.78	18503.44	18503.44	18503.44	18503.44
ED0000 - Employee 14	82263.63	20585.92	20585.92	20585.92	20585.92
ED0000 - Employee 15	84586.56	21148.64	21148.64	21148.64	21148.64
ED0000 - Employee 16	94680.78	23672.70	23672.70	23672.70	23672.70
ED0000 - Employee 18	91963.69	22966.92	22966.92	22966.92	22966.92
ED0000 - Employee 19	79411.96	19677.99	19677.99	19677.99	19677.99
ED0000 - Employee 20	89109.24	22277.31	22277.31	22277.31	22277.31
ED0000 - Employee 21	48780.20	12197.55	12197.55	12197.55	12197.55
ED0000 - Employee 22	42890.88	10702.47	10702.47	10702.47	10702.47
ED0000 - Employee 23	120364.88	30091.15	30091.15	30091.15	30091.15
ED0000 - Employee 24	39681.42	9865.35	9865.35	9865.35	9865.35
ED0000 - Employee 25	86330.88	21577.72	21577.72	21577.72	21577.72
ED0000 - Employee 26	82616.16	20627.54	20627.54	20627.54	20627.54
ED0000 - Employee 27	27932.62	6983.13	6983.13	6983.13	6983.13
ED0000 - Employee 28	47667.24	11916.89	11916.89	11916.89	11916.89
ED0000 - Employee 29	65274.60	16393.50	16393.50	16393.50	16393.50
ED0000 - Employee 30	94278.89	23566.72	23566.72	23566.72	23566.72
ED0000 - Employee 32	93649.58	23462.40	23462.40	23462.40	23462.40
ED0000 - Employee 33	72159.66	18039.77	18039.77	18039.77	18039.77
ED0000 - Employee 34	62088.38	15526.18	15526.18	15526.18	15526.18
ED0000 - Employee 35					

Step	Action
3.	Complete the "Review Employee Budget" Task Click the Complete option.
4.	Click the Next button. 
5.	End of Procedure.

3.26 - Review Element Budget

In this topic you will be able to review the HCP data / budgets (for compensation elements) by year, quarters.

Procedure



Step	Action
1.	In order to review the whole form, expand (if not already expanded) the "Year Total" column Click the Year Total Expand button. 

Task - Review Element Budget - Element Expenses for each Period - Elements on Row

Year Total	Q1	Q2	Q3	Q4
1890.89	450.00	450.00	450.00	450.00
12198.52	3047.13	3047.13	3047.13	3047.13
9177.80	2294.25	2294.25	2294.25	2294.25
3659.80	664.95	664.95	664.95	664.95
8141.39	2295.24	2295.24	2295.24	2295.24
9496.68	8741.67	8741.67	8741.67	8741.67
11390.02	2895.58	2895.58	2895.58	2895.58
300.00	75.00	75.00	75.00	75.00
40271.04	10067.76	10067.76	10067.76	10067.76
40271.04	10067.76	10067.76	10067.76	10067.76
14530.00	4882.50	4882.50	4882.50	4882.50
14530.00	4882.50	4882.50	4882.50	4882.50
14530.00	4882.50	4882.50	4882.50	4882.50
1470.02	367.51	367.51	367.51	367.51
1470.02	367.51	367.51	367.51	367.51
7891.25	1922.94	1922.94	1922.94	1922.94
7891.25	1922.94	1922.94	1922.94	1922.94
1219.86	302.72	302.72	302.72	302.72
283.19	70.80	70.80	70.80	70.80
488.72	117.18	117.18	117.18	117.18
1962.77	496.69	496.69	496.69	496.69
19530.00	4882.50	4882.50	4882.50	4882.50
19530.00	4882.50	4882.50	4882.50	4882.50
1470.02	367.51	367.51	367.51	367.51
1470.02	367.51	367.51	367.51	367.51
7891.25	1922.94	1922.94	1922.94	1922.94
7891.25	1922.94	1922.94	1922.94	1922.94
1219.86	302.72	302.72	302.72	302.72
283.19	70.80	70.80	70.80	70.80

Step	Action
2.	Review form. Use the vertical scroll bar to navigate through the form.

Task - Review Element Budget - Element Expenses for each Period - Elements on Row

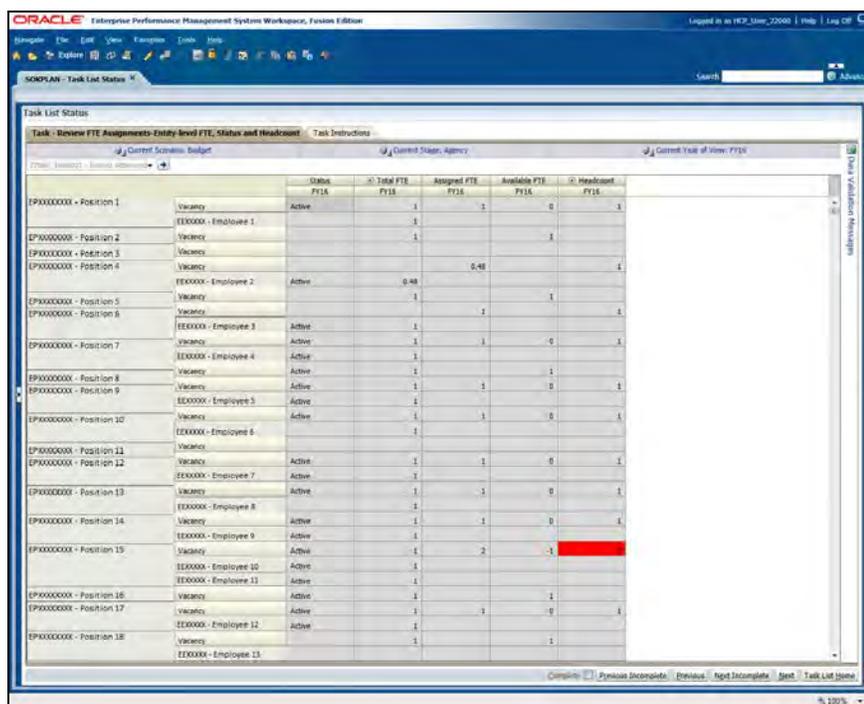
Year Total	Q1	Q2	Q3	Q4
1890.89	450.00	450.00	450.00	450.00
12198.52	3047.13	3047.13	3047.13	3047.13
9177.80	2294.25	2294.25	2294.25	2294.25
3659.80	664.95	664.95	664.95	664.95
8141.39	2295.24	2295.24	2295.24	2295.24
9496.68	8741.67	8741.67	8741.67	8741.67
11390.02	2895.58	2895.58	2895.58	2895.58
300.00	75.00	75.00	75.00	75.00
40271.04	10067.76	10067.76	10067.76	10067.76
40271.04	10067.76	10067.76	10067.76	10067.76
14530.00	4882.50	4882.50	4882.50	4882.50
14530.00	4882.50	4882.50	4882.50	4882.50
14530.00	4882.50	4882.50	4882.50	4882.50
1470.02	367.51	367.51	367.51	367.51
1470.02	367.51	367.51	367.51	367.51
7891.25	1922.94	1922.94	1922.94	1922.94
7891.25	1922.94	1922.94	1922.94	1922.94
1219.86	302.72	302.72	302.72	302.72
283.19	70.80	70.80	70.80	70.80
488.72	117.18	117.18	117.18	117.18
1962.77	496.69	496.69	496.69	496.69
19530.00	4882.50	4882.50	4882.50	4882.50
19530.00	4882.50	4882.50	4882.50	4882.50
1470.02	367.51	367.51	367.51	367.51
1470.02	367.51	367.51	367.51	367.51
7891.25	1922.94	1922.94	1922.94	1922.94
7891.25	1922.94	1922.94	1922.94	1922.94
1219.86	302.72	302.72	302.72	302.72
283.19	70.80	70.80	70.80	70.80

Step	Action
3.	Complete the "Review Element Budget" Task Click the Complete option.
4.	Click the Next button. 
5.	End of Procedure.

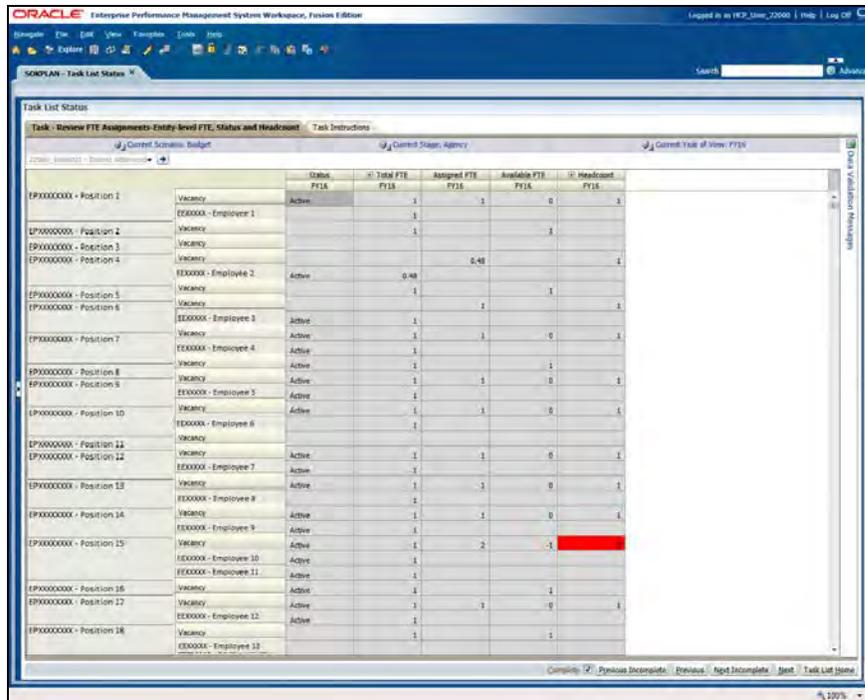
3.27 - Review FTE Assignments

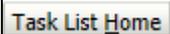
In this topic you will be able to review the HCP FTE numbers by position / employee.

Procedure



Step	Action
1.	Review FTE Assignments form. Use the scroll bar to navigate through the form.



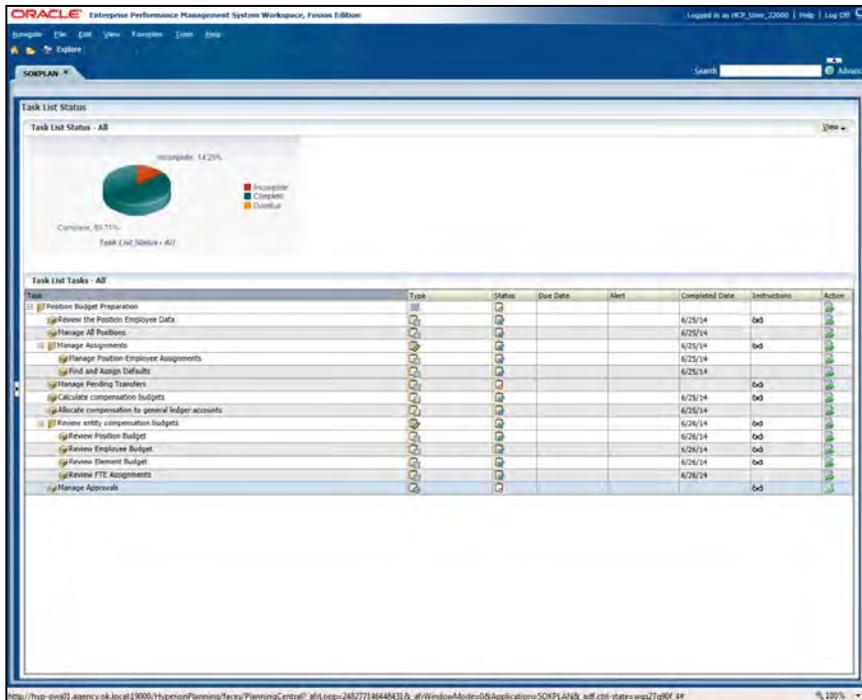
Step	Action
2.	Complete the "Review FTE Assignments" Task Click the Complete option.
3.	Click the Task List Home button. 
4.	End of Procedure.

3.28 - Manage Approvals

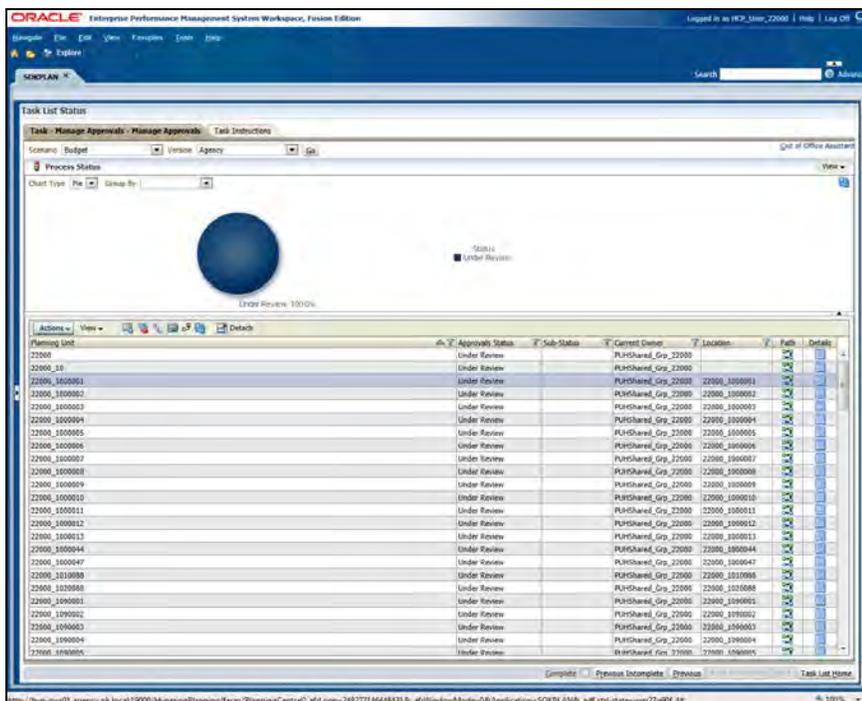
In this topic you will be able to promote their department/division to the OMES Budget Division Approvers.

A message dialog box displays with "Change Status Submitted" and the current owner changes for that department/division.

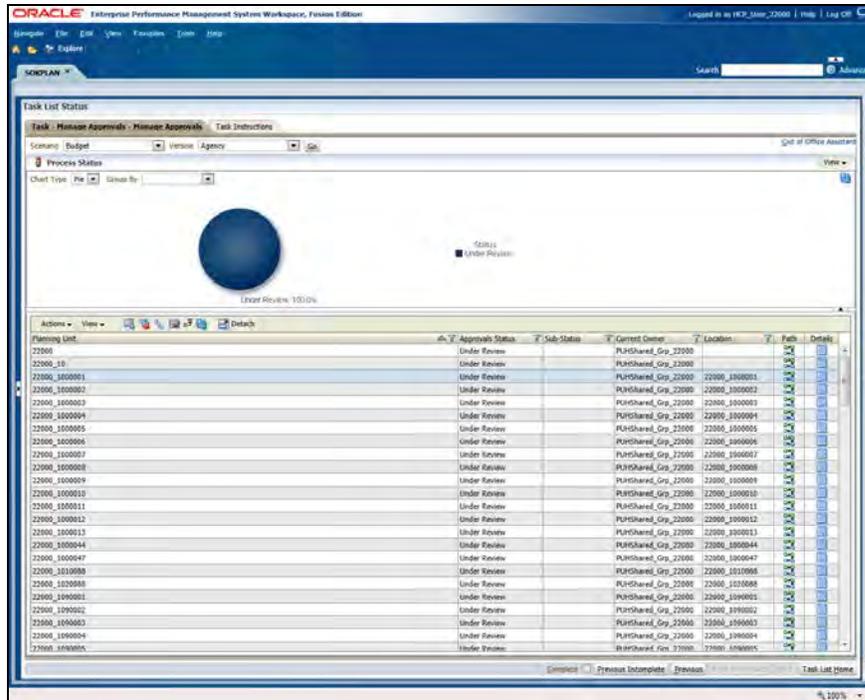
Procedure

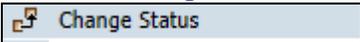


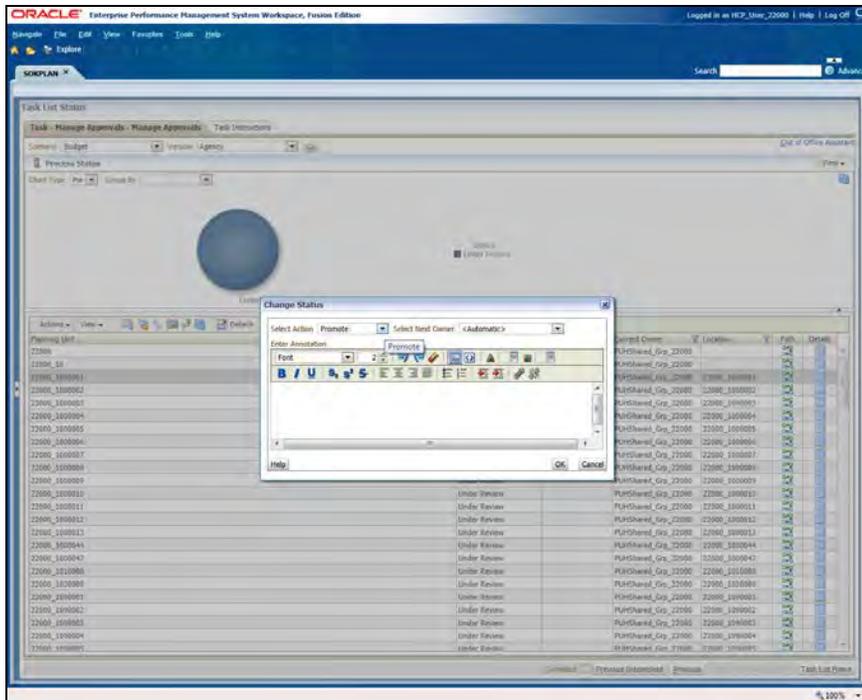
Step	Action
1.	<p>Navigate to the "Manage Approvals" task</p> <p>Click the Manage Approvals Action button.</p> 



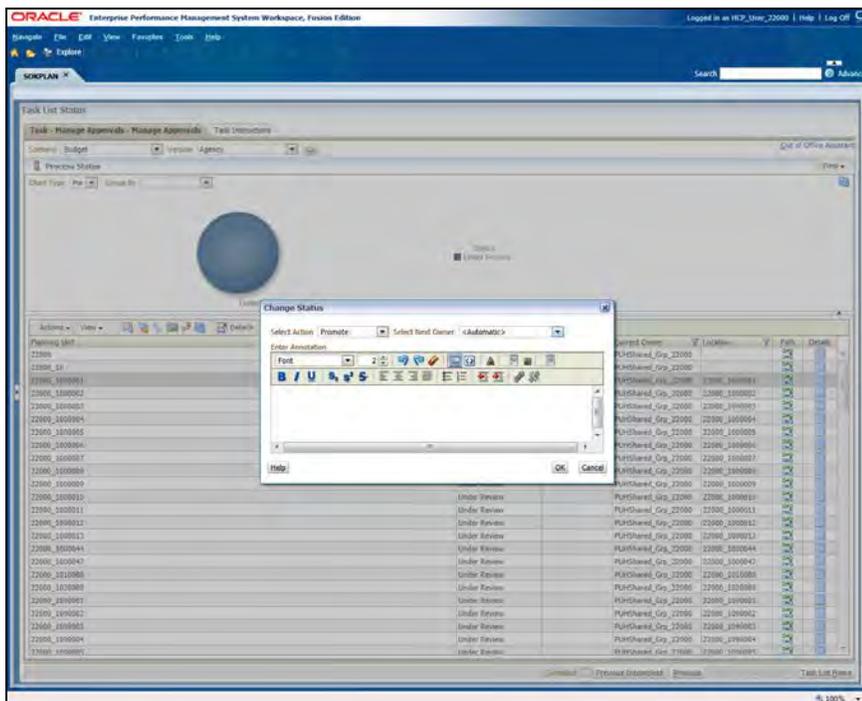
Step	Action
2.	Verify/Select the following: -Scenario: Budget -Version: Agency Click Go if selections are made



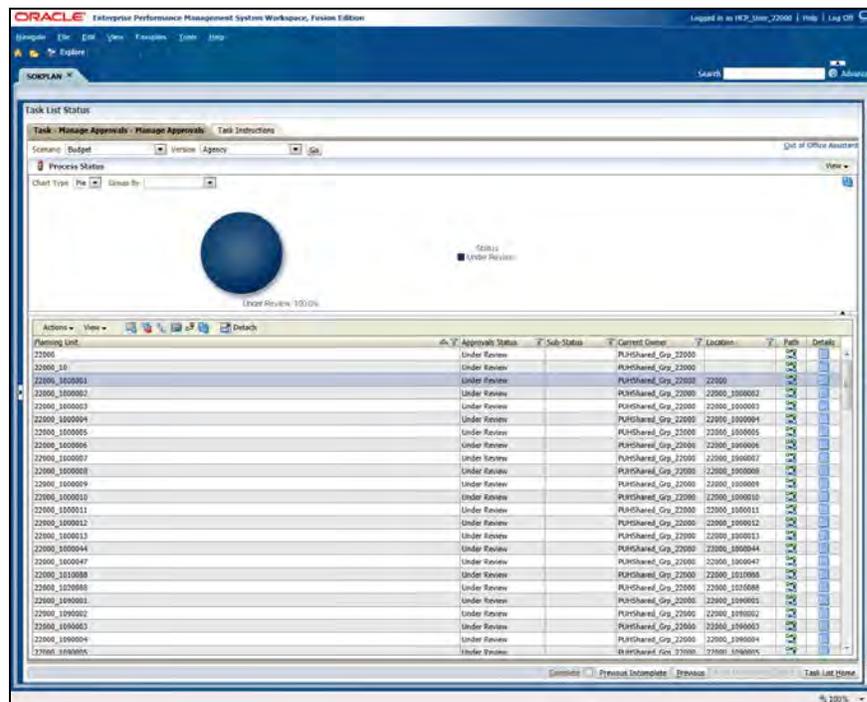
Step	Action
3.	Click the 22000_1000001 Planning Unit cell.
4.	Click the Actions menu. 
5.	Click the Change Status menu. 



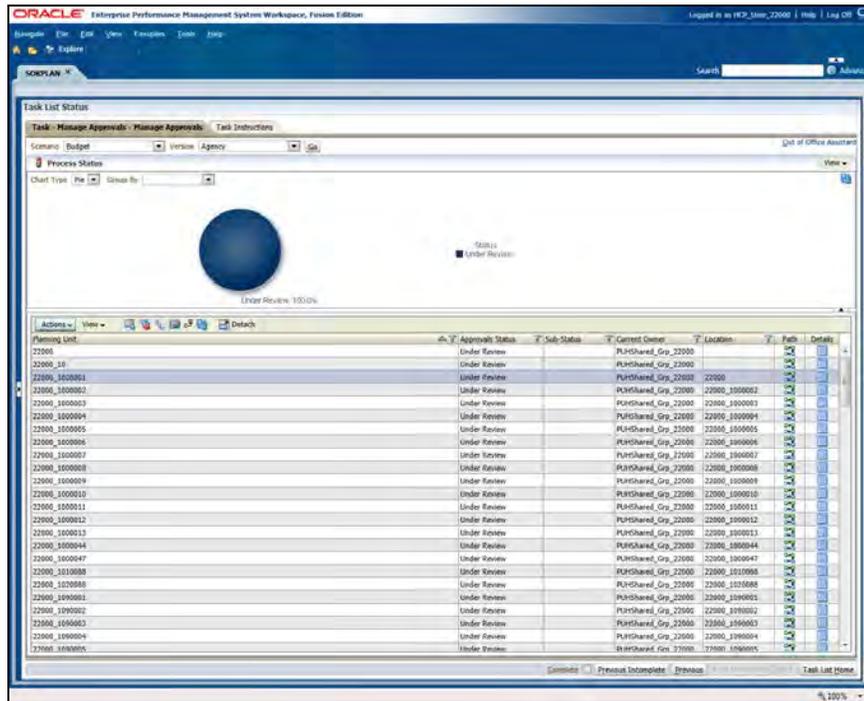
Step	Action
6.	Verify/Select "Promote" in the "Selection Action" list <input data-bbox="347 1010 553 1045" type="text" value="Promote"/>



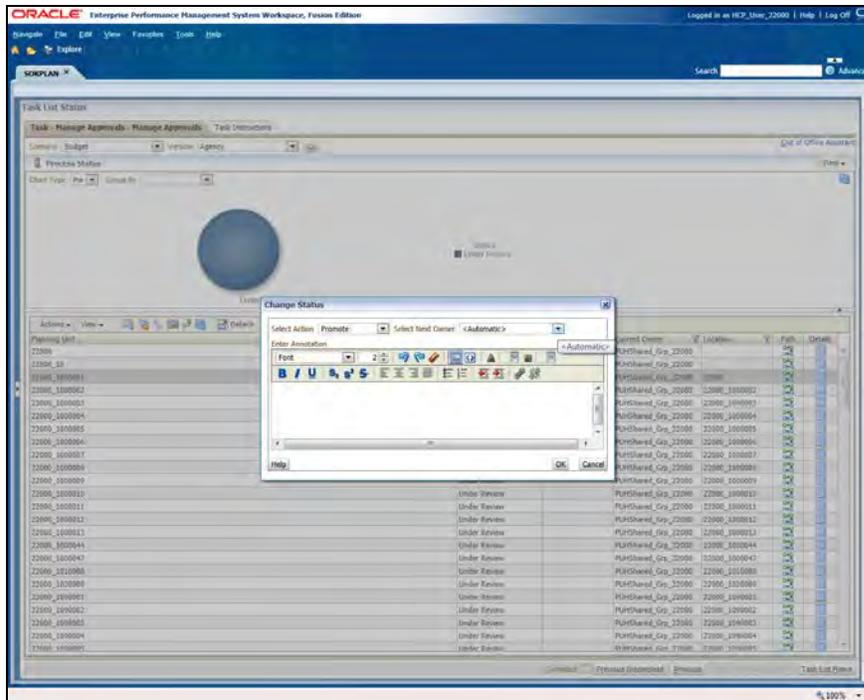
Step	Action
7.	Click the Select Next Owner list.
8.	Click the PUHShared_Grp_22000 list item.
9.	Enter the desired information into the field. Enter " Promoting the planning unit: Budget, Agency, 22000_1000001 ".
10.	Click the OK button.
11.	A message dialog box displays reading "Change Status Submitted" Click the OK button.
12.	Make sure that the "22000_1000001 Planning Unit" is selected (select if it is not) Navigate to the Actions Menu Click the Actions menu.
13.	Click the Refresh menu.



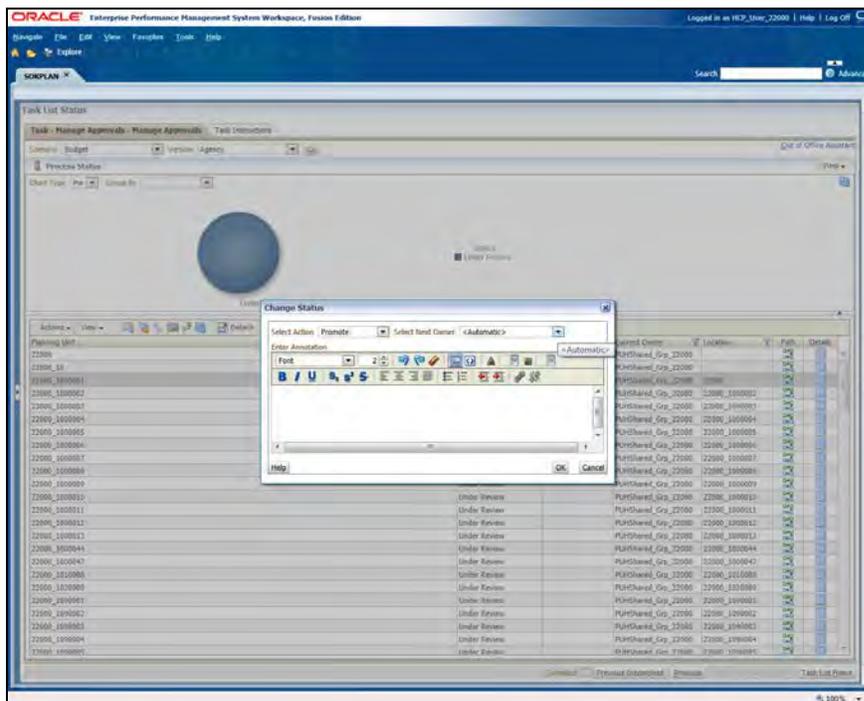
Step	Action
14.	Review the "Location" cell corresponding to Planning Unit "22000_1000001". The owner will now be the 5 digit agency <div style="border: 1px solid black; padding: 2px; display: inline-block;">22000</div>



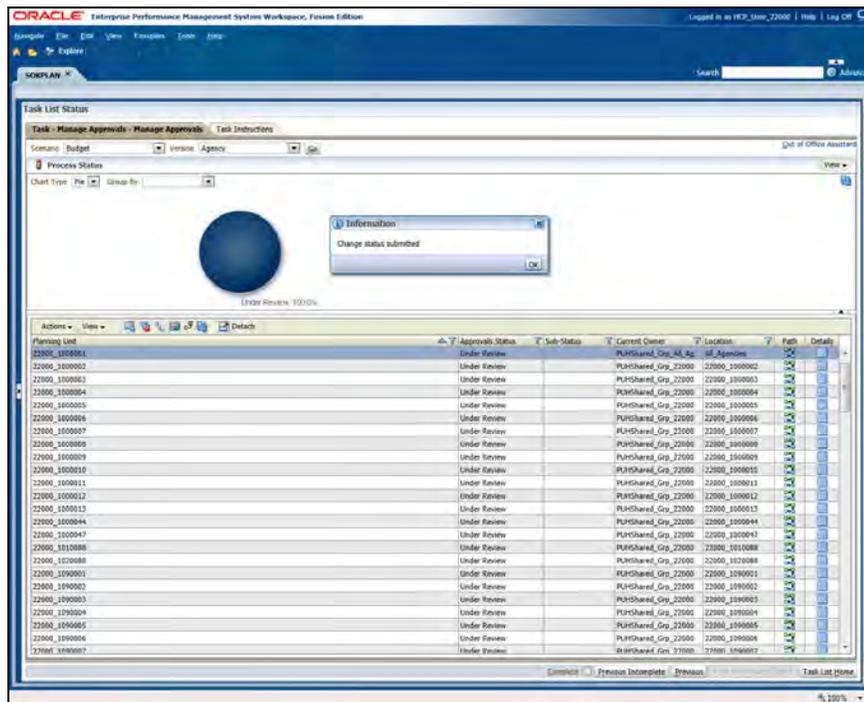
Step	Action
15.	Click the Actions menu. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Actions ▾</div>
16.	Click the Change Status menu. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Change Status</div>



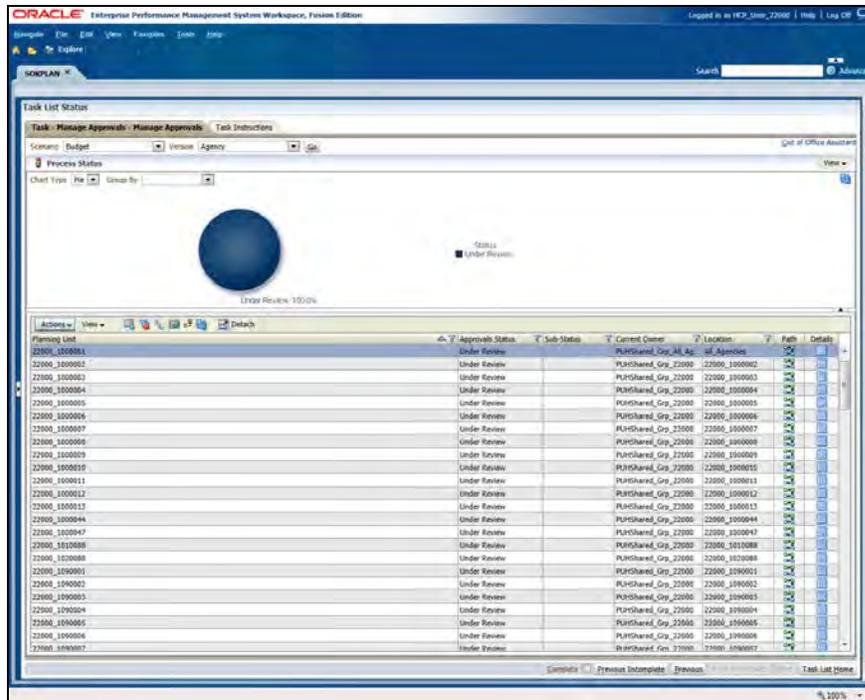
Step	Action
17.	Verify/Select "Promote" in the "Selection Action" list <div style="border: 1px solid black; padding: 2px; display: inline-block;"> Select Action Promote </div>



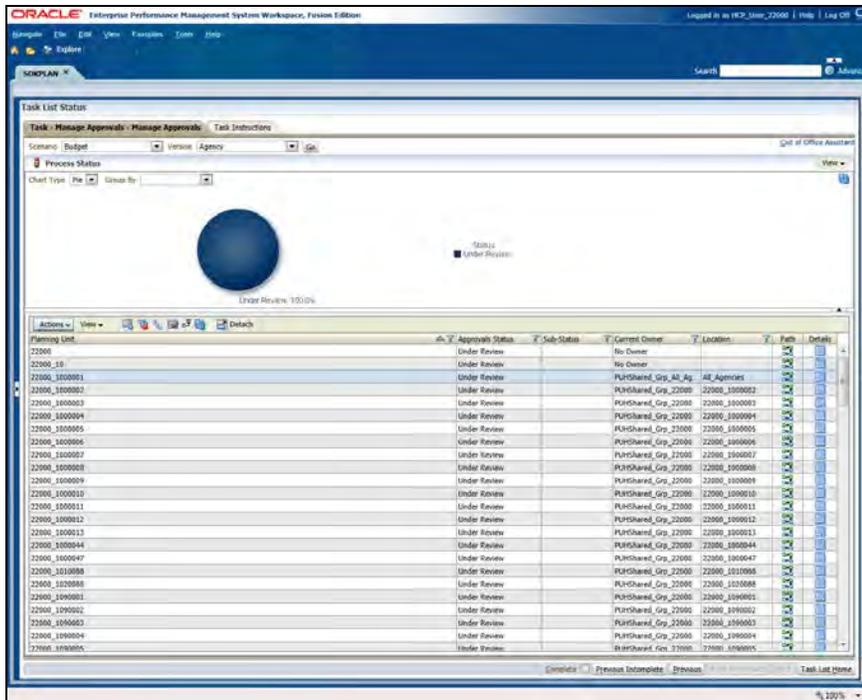
Step	Action
18.	Click the Select Next Owner list.
19.	Click the PUHShared_Grp_All_Agencies list item.
20.	Enter the desired information into the field. Enter " Promoting to All Agencies ".
21.	Click the OK button.



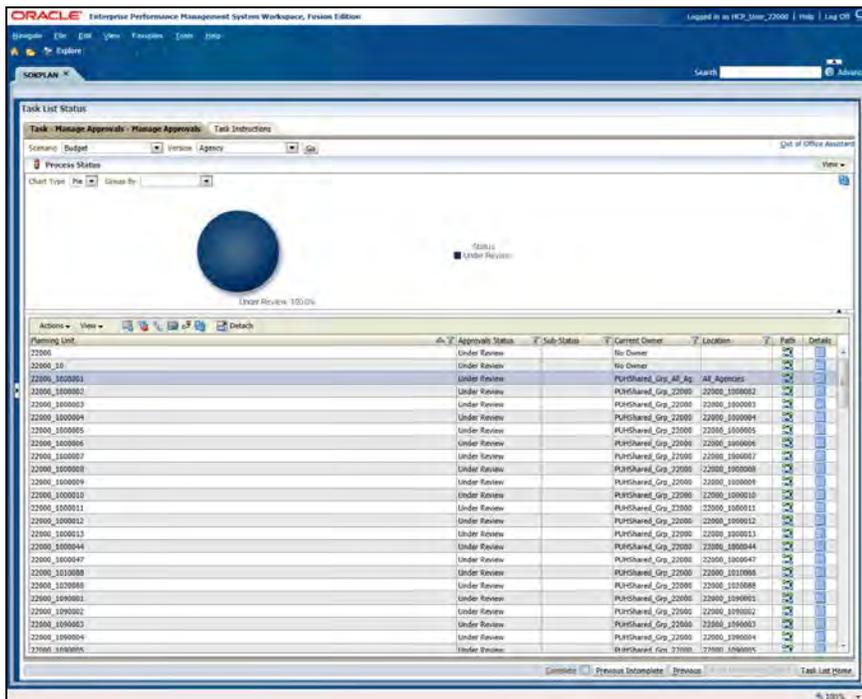
Step	Action
22.	Message dialog box displays reading: " <i>Change status submitted</i> "

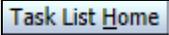


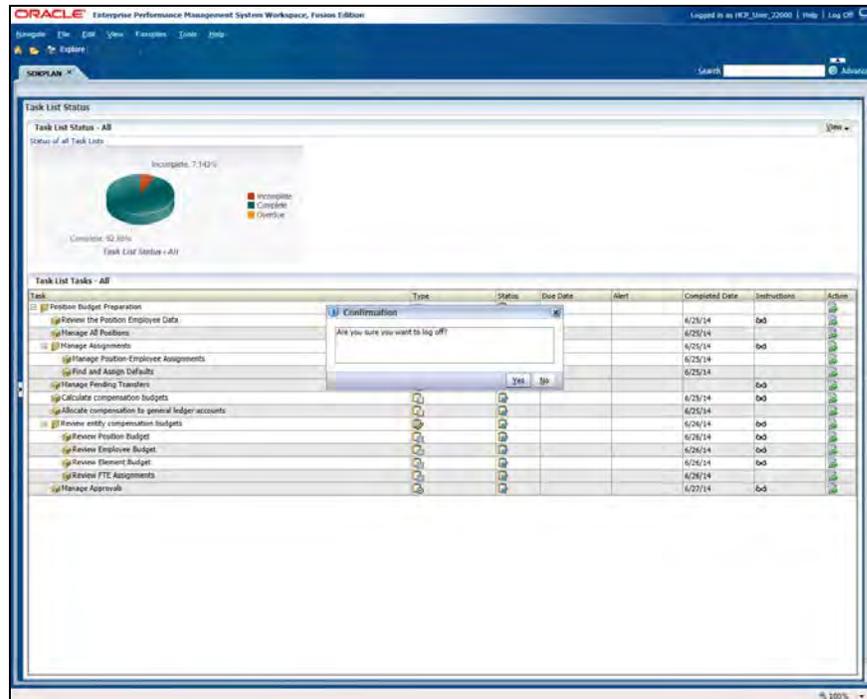
Step	Action
23.	Click the Actions menu. 
24.	Click the Refresh menu. 



Step	Action
25.	Review the "Location" cell corresponding to Planning Unit "22000_1000001". The owner will now be the "All_Agencies" <u>All_Agencies</u>



Step	Action
26.	Complete the "Manage Approvals" Task Click the Complete option.
27.	Click the Task List Home button. 
28.	Click the Log Off object. 



Step	Action
29.	Message dialog box displays reading: "Are you sure you want to log off?" 
30.	End of Procedure.

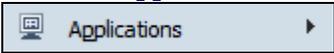
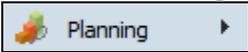
Position Budget Reviewer

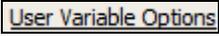
3.29 - Setting Preferences

In this topic you will open the SOKPLAN application upon subsequent logons. User will also have the correct base dimensions set to Budget, Agency (Agency Request), FY16, and Current Service Level.

Procedure



Step	Action
1.	<p>To begin using the application, we must first Log On.</p> <p>The user name is not case-sensitive</p> <p>Enter the desired information into the field. Enter "<User Name>".</p>
2.	Enter the desired information into the field. Enter " <Password> ".
3.	<p>Click the Log On button.</p> 
4.	<p>In order to open up the SOKPLAN application the following steps must be completed:</p> <p>Click the Navigate menu.</p> 
5.	<p>Click the Applications menu.</p> 
6.	<p>Click the Planning menu.</p> 
7.	<p>Click the SOKPLAN menu.</p> 

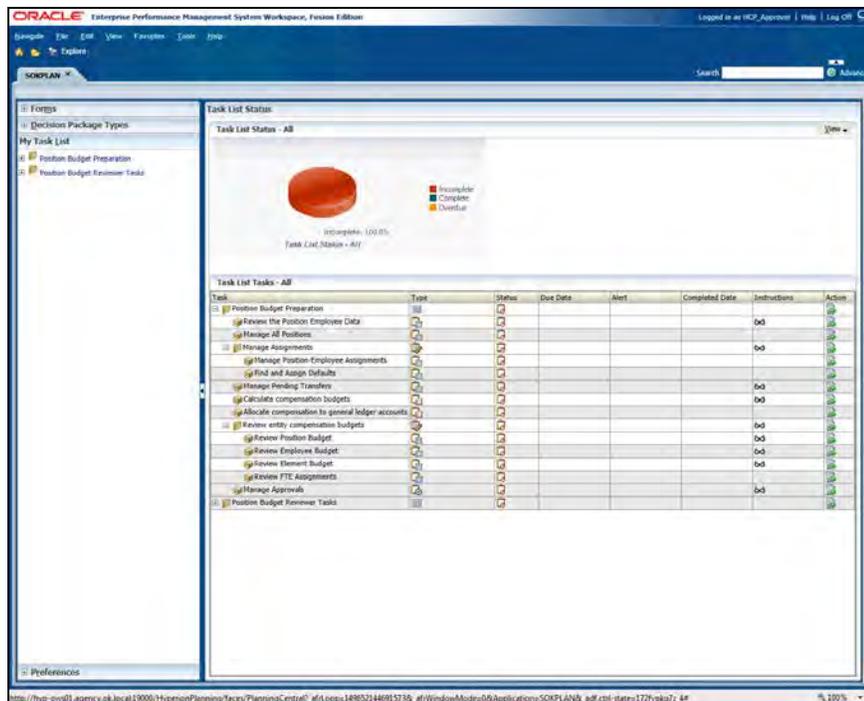
Step	Action
8.	Click the Preferences Expand button. 
9.	Click the User Variable Options tab. 
10.	Click the Scenario Member Selector button. 
11.	Click the Budget list item. 
12.	Click the Add button. 
13.	Click the OK button. 
14.	Click the Stage Member Selector graphic. 
15.	Click the Agency list item. 
16.	Click the Add button. 
17.	Click the OK button. 
18.	Click the Year of View button. 
19.	Click the All Years Expand button. 
20.	Click the FY16 list item. 
21.	Click the Add button. 
22.	Click the OK button. 
23.	Click the Request Member Selector button. 
24.	Click the Total Request Expand button. 
25.	Click the Current Service Level list item. 
26.	Click the Add button. 

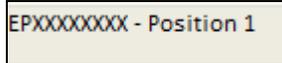
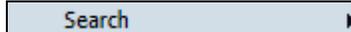
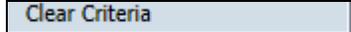
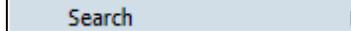
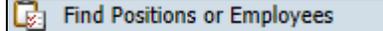
Step	Action
27.	Click the OK button. 
28.	Click the Save button. 
29.	A message box displays reading "User Preferences have been saved." Click the OK button. 
30.	Click the My Task List Expand button. 
31.	End of Procedure.

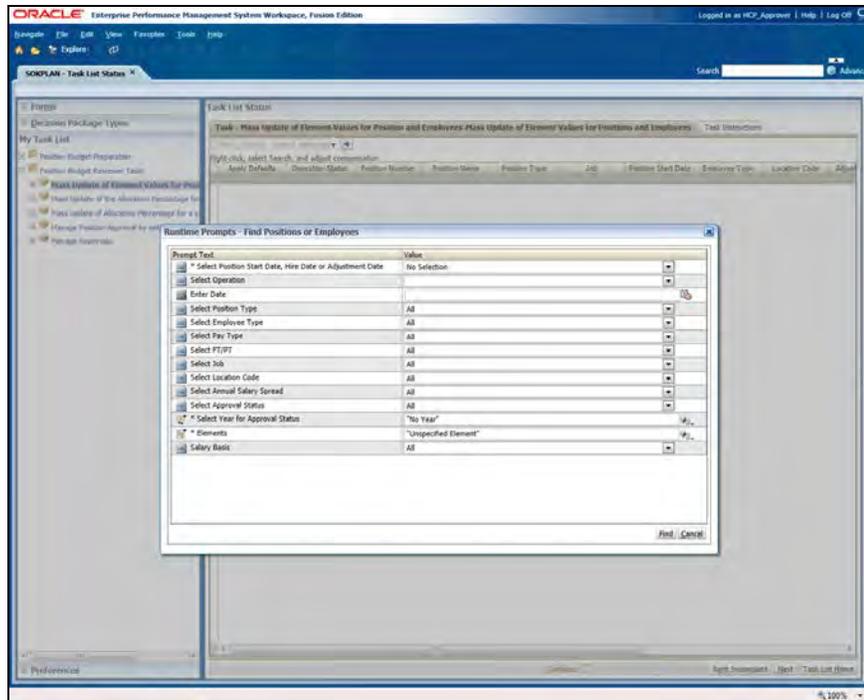
3.30 - Mass update of Element Values for Positions and Employees

In this topic you will be able to find positions / employees and apply mass updates.
You will see a message in the Operation Status column validating the success of the assignments.
You will be able to increment salaries.

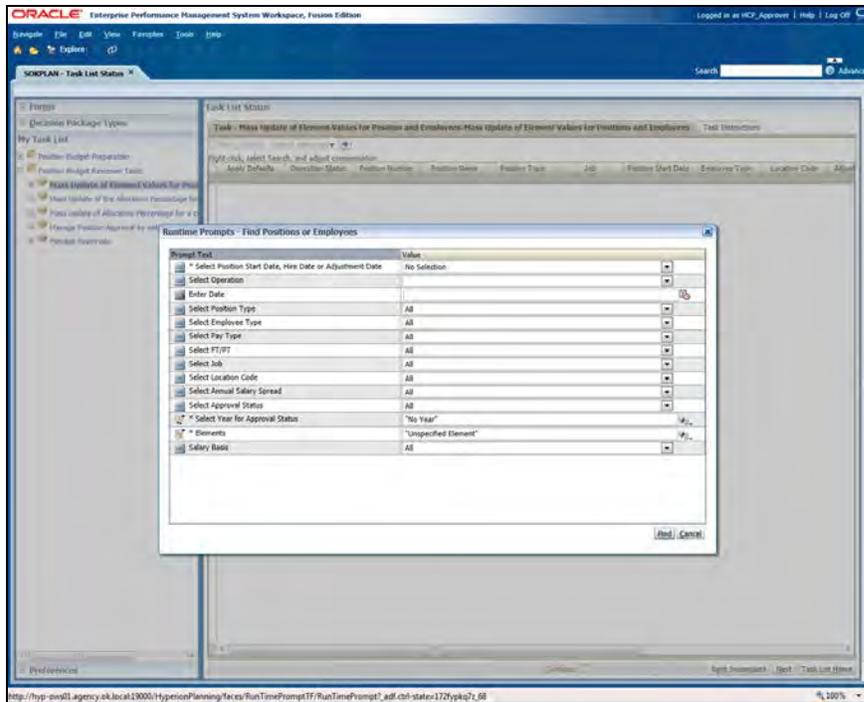
Procedure



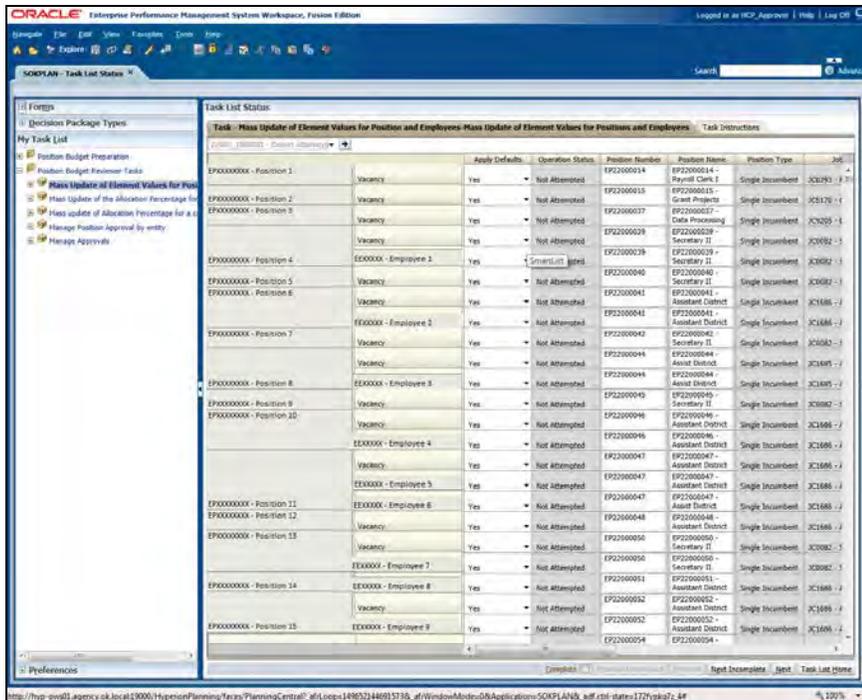
Step	Action
1.	Click the Position Budget Reviewer Tasks Expand button. 
2.	Click the Mass Update of Element Values for Position and Employees object. 
3.	<i>E.g.:</i> Right-click the EP22000014 - Payroll Clerk I object. 
4.	Click the Search menu. 
5.	Click the Clear Criteria menu. 
6.	<i>A message appears reading "Clear Criteria was successful"</i> Click the OK button. 
7.	Right-click the row header. 
8.	Click the Search menu. 
9.	Click the Find Positions or Employees menu. 



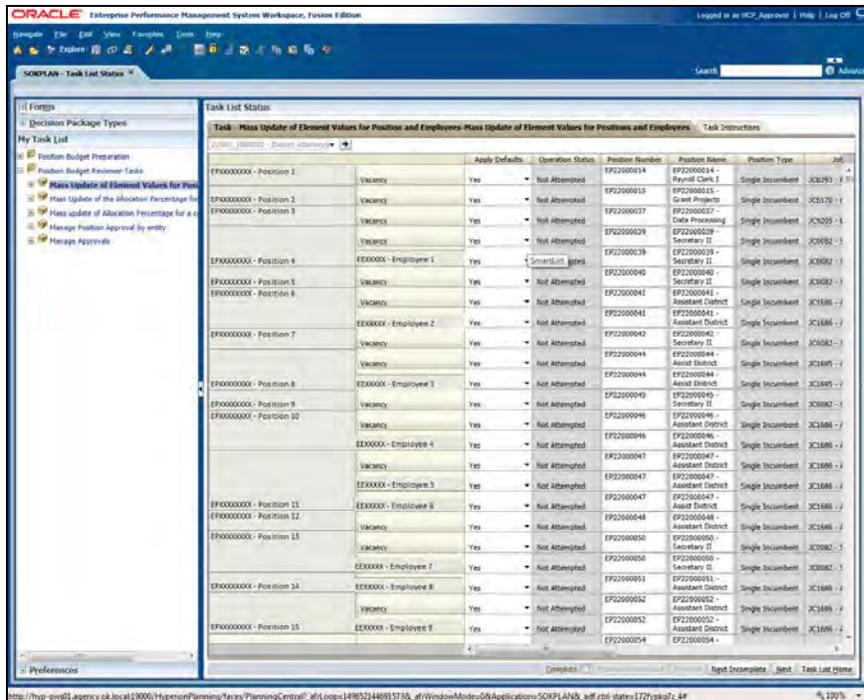
Step	Action
10.	<p><i>Select Values</i></p> <p><i>-Enter/Select values for appropriate fields within the "Find Positions or Employees" tab</i></p> <p><i>Select Position Start Date, Hire Date or Adjustment Date: for example: No Selection</i></p> <p><i>Select Operation: for example: Leave Blank</i></p> <p><i>Enter Date: for example: Leave Blank</i></p> <p><i>Select Position Type: for example: All</i></p> <p><i>Select Employee Type: for example: All</i></p> <p><i>Select Pay Type: for example: All</i></p> <p><i>Select FT/PT: for example: All</i></p> <p><i>Select Job: for example: All</i></p> <p><i>Select Location Code: for example: All</i></p> <p><i>Select Union Code: for example: All</i></p> <p><i>Select Annual Salary Spread: for example: All</i></p> <p><i>Select Approval Status: for example: All</i></p> <p><i>Select Year for Approval Status: for example: "No Year"</i></p> <p><i>Elements: for example: "Unspecified Element"</i></p> <p><i>Salary Basis: for example: All</i></p>



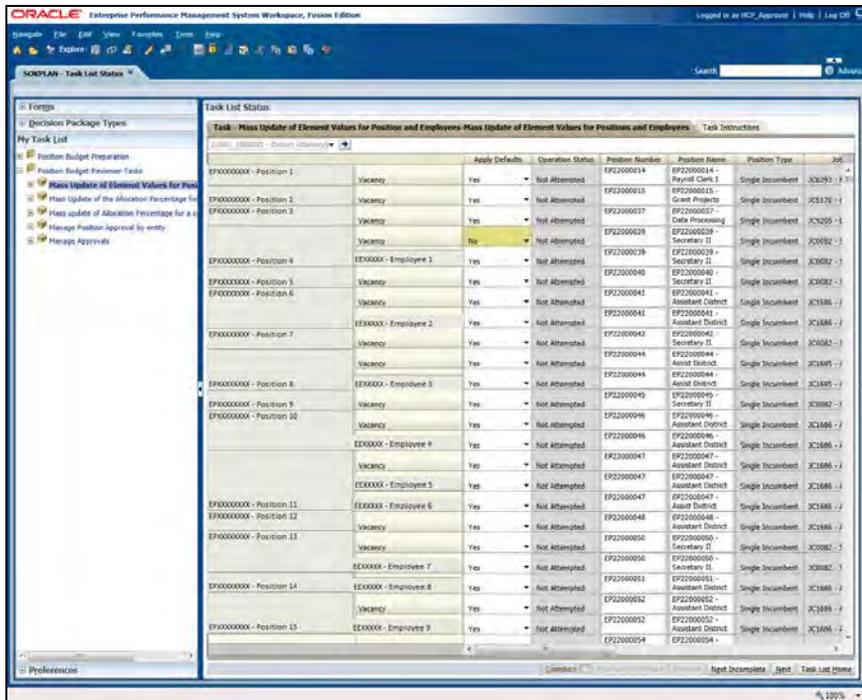
Step	Action
11.	Click the Find button. 
12.	A message appears reading: "Evaluate Criteria was successful." Click the OK button. 



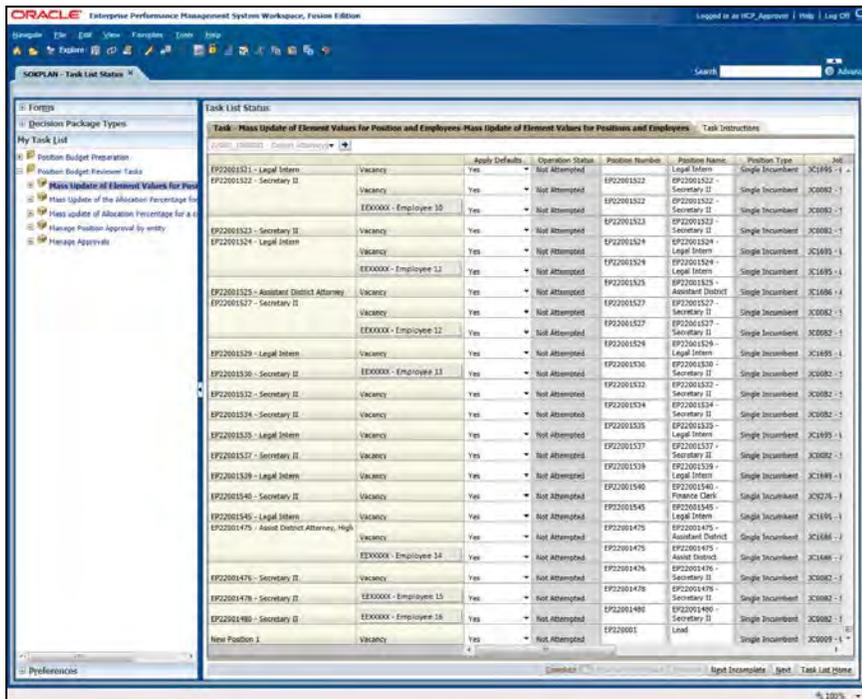
Step	Action
13.	<p><i>Apply Defaults</i></p> <p>-Navigate to the "Apply Defaults" column on the "Find and Assign Defaults" page</p> <p>-Select "No" from the smart list in the "Apply Defaults" column for a range of Positions, for example: EP22000044:EP22001545</p> <p>Apply Defaults</p>



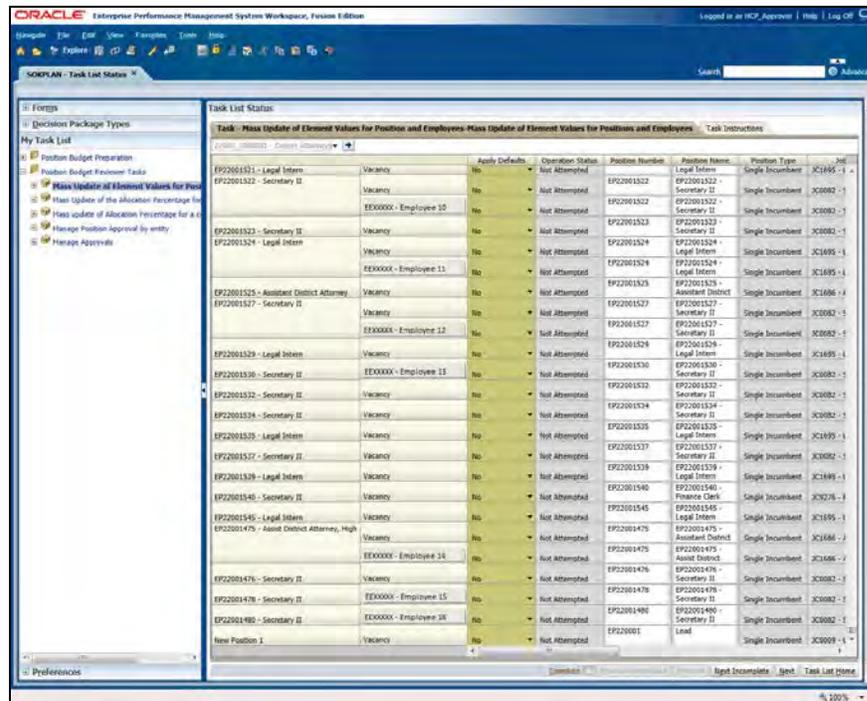
Step	Action
14.	<p>Navigate to a default for an appropriate employee in the "Apply Defaults" column</p> <p>Click the Apply Defaults SmartList button.</p> 
15.	<p>Click the No list item.</p> 
16.	<p>Click the Apply Defaults cell.</p> 
17.	<p>Copy the content</p> <p>[NOTE: A "Allow Access" window may appear in which you click "Allow"]</p> <p>Press [Ctrl+C].</p>



Step	Action
18.	Use the scroll bar to scroll to the bottom of the page selecting a range of cells



Step	Action
19.	<p>Navigate to the last cell in the <u>Apply Defaults</u> column</p> <p>Press the [Shift] key and click the Apply Defaults cell.</p> <input type="text" value="Yes"/>
20.	<p>Paste the contents</p> <p>Press [Ctrl+V].</p>



Step	Action
21.	<p>Wait for the paste function to finish</p> <input type="text" value="No"/>

ORACLE Enterprise Performance Management System Workspace, Fusion Edition

Task List Status

Task - Mass Update of Element Values for Position and Employees - Mass Update of Element Values for Positions and Employees

Position Number	Position Name	Position Type	Job
EP22001521	Legal Intern	Single Incumbent	JC1495 - 1
EP22001522	Secretary II	Single Incumbent	JC0882 - 1
EP22001522	Secretary II	Single Incumbent	JC0882 - 1
EP22001522	Secretary II	Single Incumbent	JC0882 - 1
EP22001523	Secretary II	Single Incumbent	JC0882 - 1
EP22001524	Legal Intern	Single Incumbent	JC1495 - 1
EP22001524	Legal Intern	Single Incumbent	JC1495 - 1
EP22001525	Assistant District Attorney	Single Incumbent	JC1486 - 1
EP22001527	Secretary II	Single Incumbent	JC0882 - 1
EP22001527	Secretary II	Single Incumbent	JC0882 - 1
EP22001528	Legal Intern	Single Incumbent	JC1495 - 1
EP22001530	Secretary II	Single Incumbent	JC0882 - 1
EP22001532	Secretary II	Single Incumbent	JC0882 - 1
EP22001534	Secretary II	Single Incumbent	JC0882 - 1
EP22001535	Legal Intern	Single Incumbent	JC1495 - 1
EP22001537	Secretary II	Single Incumbent	JC0882 - 1
EP22001539	Legal Intern	Single Incumbent	JC1495 - 1
EP22001540	Secretary II	Single Incumbent	JC0882 - 1
EP22001540	Finance Clerk	Single Incumbent	JC0278 - 1
EP22001540	Legal Intern	Single Incumbent	JC1495 - 1
EP22001475	Assistant District Attorney	Single Incumbent	JC1486 - 1
EP22001475	Assistant District Attorney	Single Incumbent	JC1486 - 1
EP22001476	Secretary II	Single Incumbent	JC0882 - 1
EP22001478	Secretary II	Single Incumbent	JC0882 - 1
EP22001480	Secretary II	Single Incumbent	JC0882 - 1
EP22001480	Secretary II	Single Incumbent	JC0882 - 1
EP220001	Lead	Single Incumbent	JC0009 - 1

Step	Action
22.	Click the Save button.



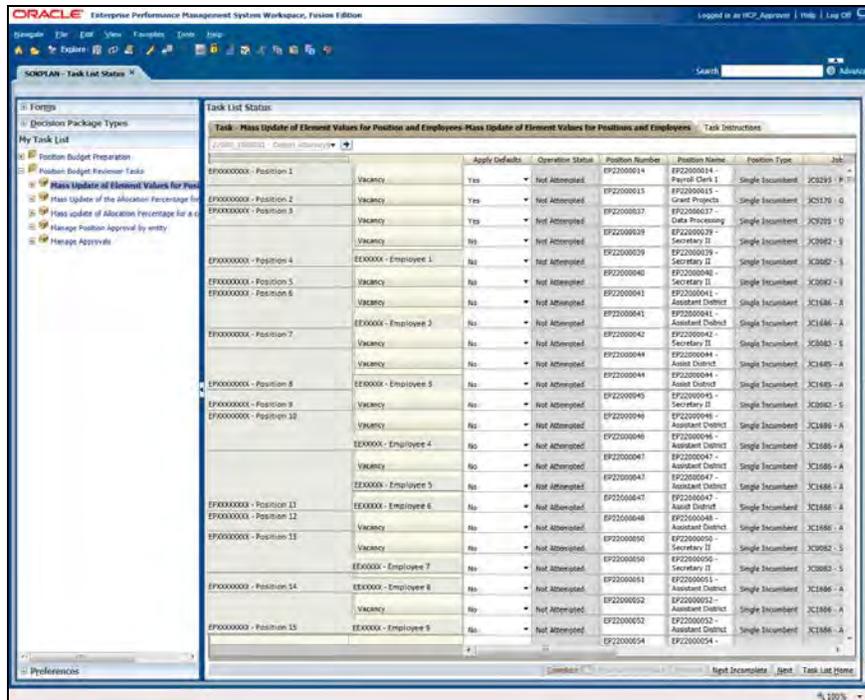
ORACLE Enterprise Performance Management System Workspace, Fusion Edition

Task List Status

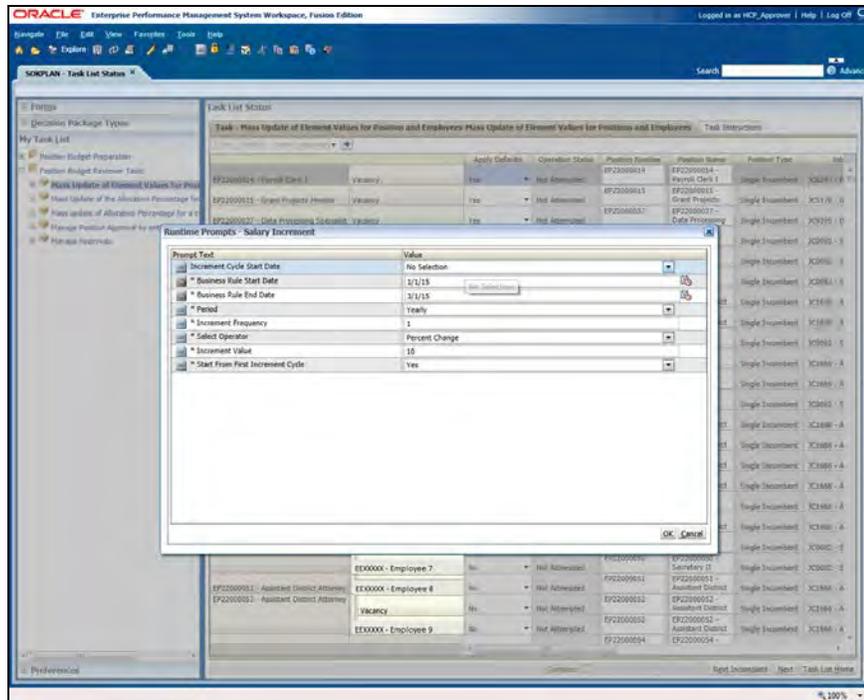
Task - Mass Update of Element Values for Position and Employees - Mass Update of Element Values for Positions and Employees

Position Number	Position Name	Position Type	Job
EP22001521	Legal Intern	Single Incumbent	JC1495 - 1
EP22001522	Secretary II	Single Incumbent	JC0882 - 1
EP22001522	Secretary II	Single Incumbent	JC0882 - 1
EP22001522	Secretary II	Single Incumbent	JC0882 - 1
EP22001523	Secretary II	Single Incumbent	JC0882 - 1
EP22001524	Legal Intern	Single Incumbent	JC1495 - 1
EP22001524	Legal Intern	Single Incumbent	JC1495 - 1
EP22001525	Assistant District Attorney	Single Incumbent	JC1486 - 1
EP22001527	Secretary II	Single Incumbent	JC0882 - 1
EP22001527	Secretary II	Single Incumbent	JC0882 - 1
EP22001528	Legal Intern	Single Incumbent	JC1495 - 1
EP22001530	Secretary II	Single Incumbent	JC0882 - 1
EP22001532	Secretary II	Single Incumbent	JC0882 - 1
EP22001534	Secretary II	Single Incumbent	JC0882 - 1
EP22001535	Legal Intern	Single Incumbent	JC1495 - 1
EP22001537	Secretary II	Single Incumbent	JC0882 - 1
EP22001539	Legal Intern	Single Incumbent	JC1495 - 1
EP22001540	Secretary II	Single Incumbent	JC0882 - 1
EP22001540	Finance Clerk	Single Incumbent	JC0278 - 1
EP22001540	Legal Intern	Single Incumbent	JC1495 - 1
EP22001475	Assistant District Attorney	Single Incumbent	JC1486 - 1
EP22001475	Assistant District Attorney	Single Incumbent	JC1486 - 1
EP22001476	Secretary II	Single Incumbent	JC0882 - 1
EP22001478	Secretary II	Single Incumbent	JC0882 - 1
EP22001480	Secretary II	Single Incumbent	JC0882 - 1
EP22001480	Secretary II	Single Incumbent	JC0882 - 1
EP220001	Lead	Single Incumbent	JC0009 - 1

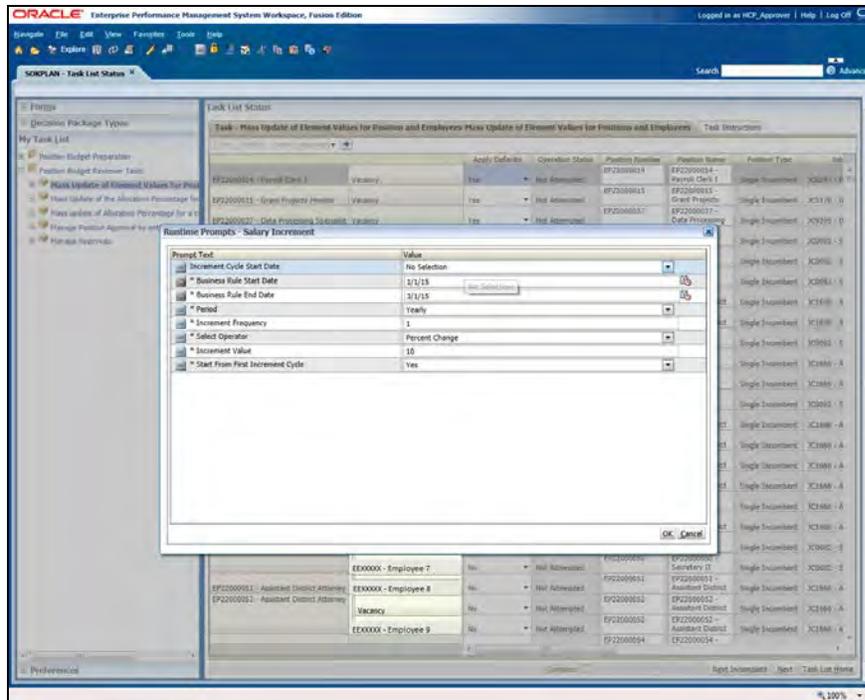
Step	Action
23.	Use the scroll bar to navigate to the top of the form



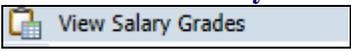
Step	Action
24.	<p>E.g.:</p> <p>Right-click the EP22000014 - Payroll Clerk I row header.</p> <div style="border: 1px solid black; padding: 2px; width: fit-content;">EPXXXXXXXX - Position 1</div>
25.	<p>Click the Salary Increment menu.</p> <div style="border: 1px solid black; padding: 2px; width: fit-content;"> Salary Increment </div>

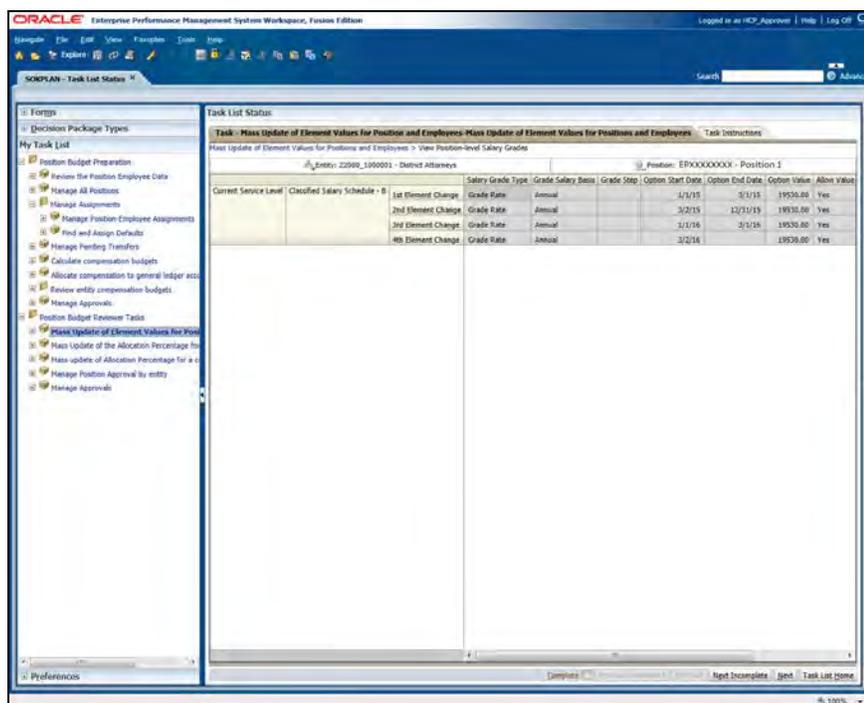


Step	Action
26.	<p>-Enter/Select values for all the fields</p> <p><i>Increment Cycle Start Date: for example: No Selection</i></p> <p><i>Business Rule Start date: for example: 1/1/15</i></p> <p><i>Business Rule End Date: for example: 3/1/15</i></p> <p><i>Period: for example: Yearly</i></p> <p><i>Increment Frequency: for example: 1</i></p> <p><i>Select Operator: for example: Percentage Change</i></p> <p><i>Increment Value: for example: 10</i></p> <p><i>Start from first increment Cycle: for example: Yes</i></p>

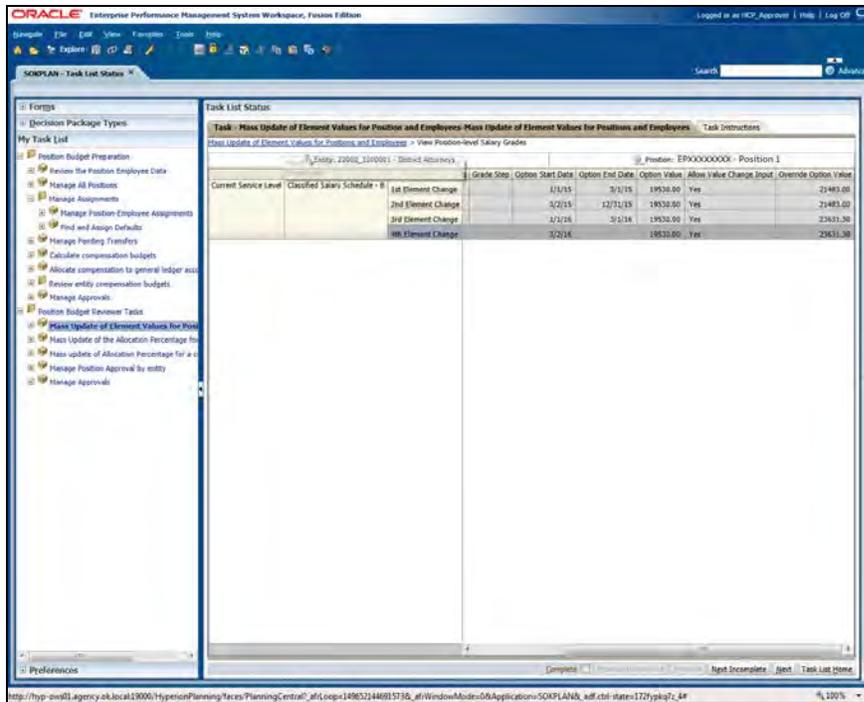


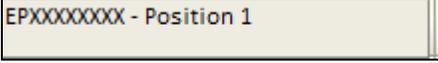
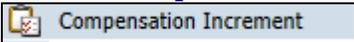
Step	Action
27.	Click the Increment Cycle Date list.
28.	Click the No Selection list item.
29.	Enter the desired information into the Business Rule Start Date field. Enter "1/1/16" .
30.	Enter the desired information into the Business Rule End Date field. Enter "3/1/16" .
31.	Click the Period list.
32.	Click the Yearly list item.
33.	Enter the desired information into the Increment Frequency field. Enter "1" .
34.	Click the Select Operator list.
35.	Click the Percent Change list item.
36.	Enter the desired information into the Increment Value field. Enter "10" .
37.	Click the OK button. 
38.	A message displays reading <i>"AutoIncrementSal was successful"</i> Click the OK button. 

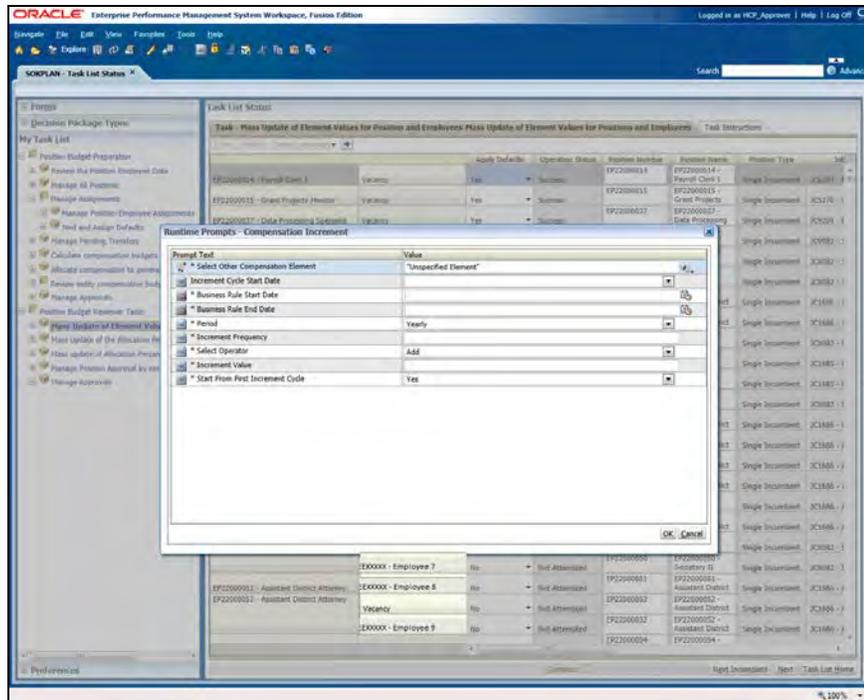
Step	Action
39.	<p><i>E.g.:</i></p> <p>Right-click the EP22000014 - Payroll Clerk I row header.</p> 
40.	<p>Click the View Position Details menu.</p> 
41.	<p>Click the View Salary Grades menu.</p> 



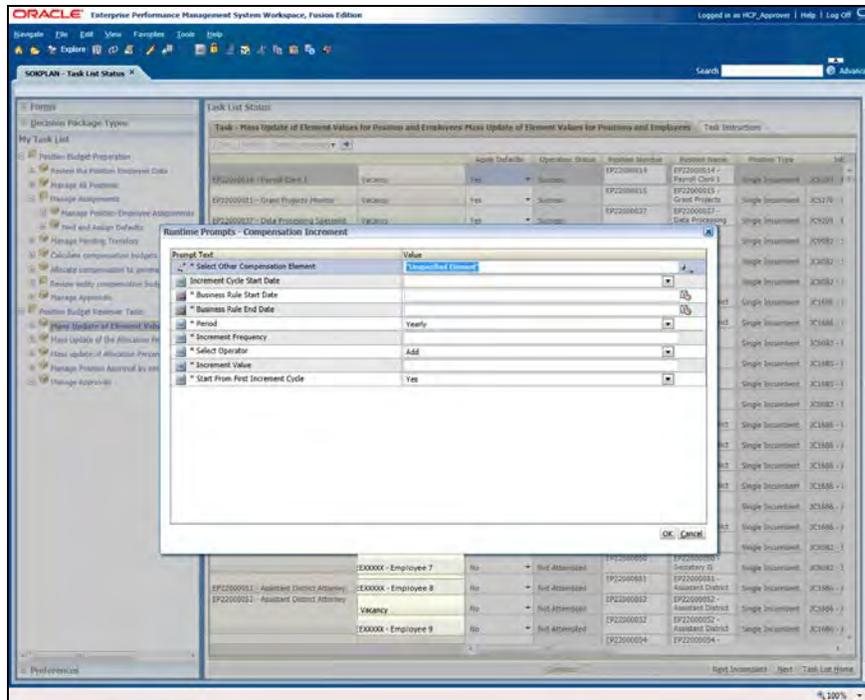
Step	Action
42.	<i>Use Horizontal scroll bar to scroll to the right of the form</i>
43.	<i>Review the 3rd and 4th Element changes, the option end dates and the Override Option Value</i>



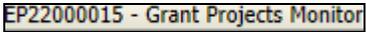
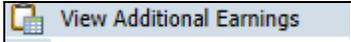
Step	Action
44.	Click the Mass Update of Element Values for Positions and Employees link. Mass Update of Element Values for Positions and Employees
45.	<i>Select a Position</i> <i>E.g.:</i> Right-click the EP2200014 - Payroll Clerk I row header. 
46.	Click the Compensation Increment menu. 

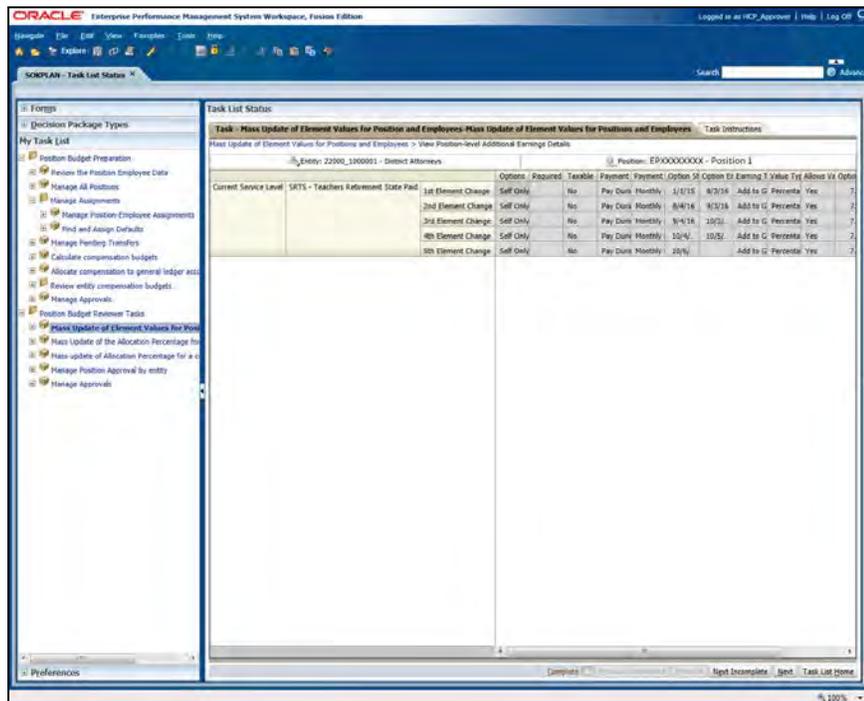


Step	Action
47.	<p>-Enter/Select values for all the fields</p> <p>Select Other Compensation Element: "SRTS"</p> <p>Increment Cycle Start Date: No Selection</p> <p>Business Rule Start Date: 8/4/16</p> <p>Business Rule End Date: 10/5/16</p> <p>Period: Monthly</p> <p>Increment Frequency: 1</p> <p>Select Operator: Add</p> <p>Increment Value: 5</p> <p>Start from First Increment Cycle: Yes</p>

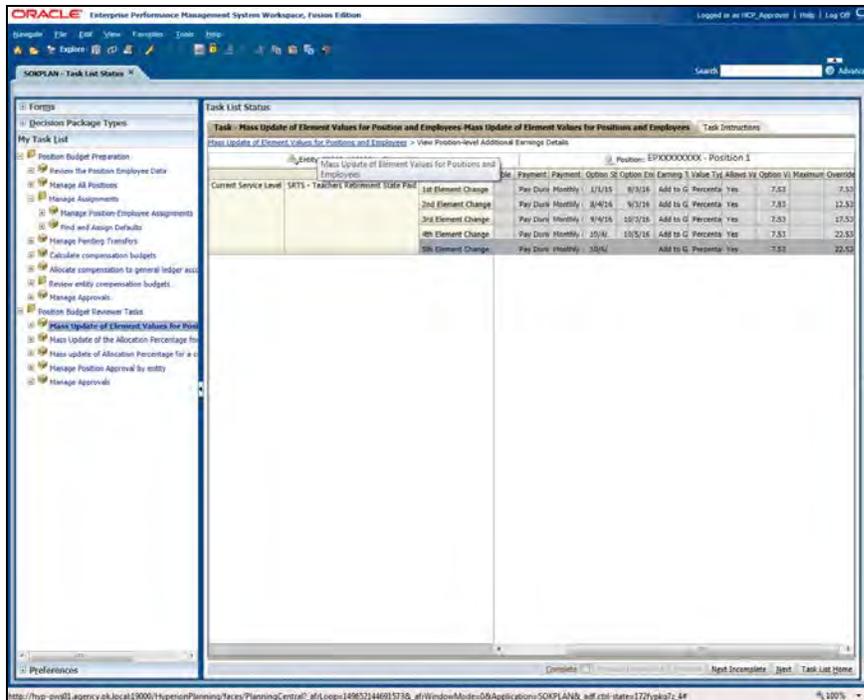


Step	Action
48.	Enter the desired information into the Select Other Compensation Element field. Enter "SRTS" .
49.	Click the Increment Cycle Start Date list.
50.	Click the No Selection list item.
51.	Enter the desired information into the Business Rule Start Date field. Enter "8/4/16" .
52.	Enter the desired information into the Business Rule End Date field. Enter "10/5/16" .
53.	Click the Period list.
54.	Click the Monthly list item.
55.	Enter the desired information into the Increment Frequency field. Enter "1" .
56.	Click the Increment Frequency list.
57.	Click the Add list item.
58.	Enter the desired information into the Increment Value field. Enter "5" .
59.	Click the OK button. 
60.	A message displays reading <i>"AutoIncrementNonSal was successful"</i> Click the OK button. 

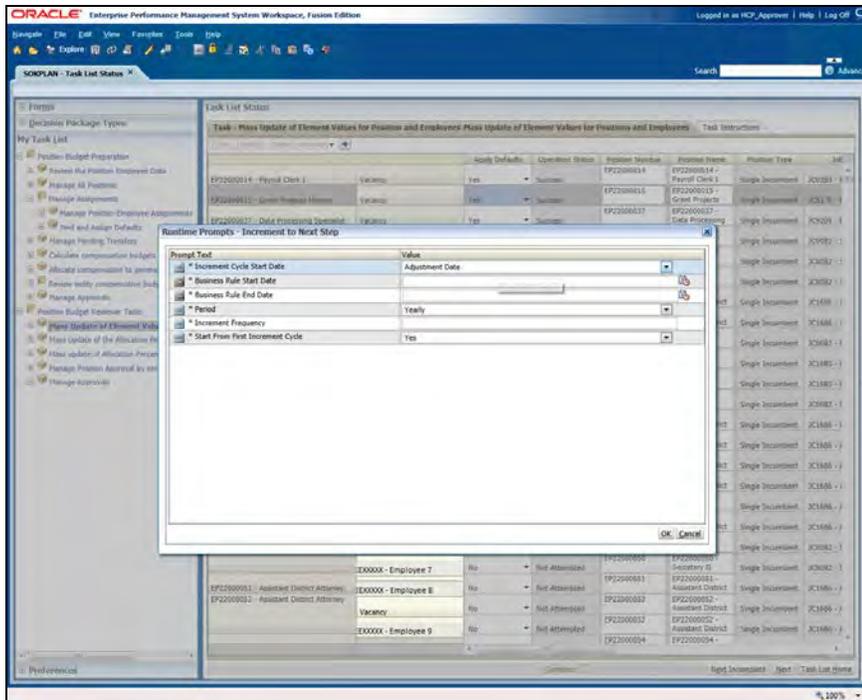
Step	Action
61.	<i>E.g.:</i> Right-click the EP22000015 - Grant Projects Monitor object. 
62.	Click the View Position Details menu. 
63.	Click the View Additional Earnings menu. 



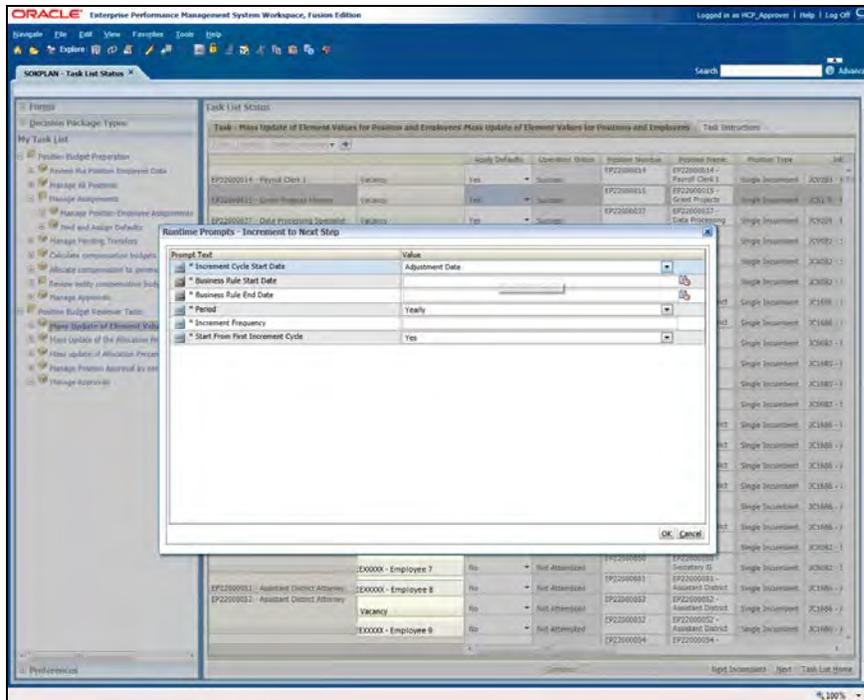
Step	Action
64.	<i>Use the horizontal scroll bar to scroll to the right of the form</i>
65.	<i>Expand the columns to view all the data as necessary</i> 
66.	<i>Review the 3rd, 4th and 5th Element changes, option end date and the override option value</i>



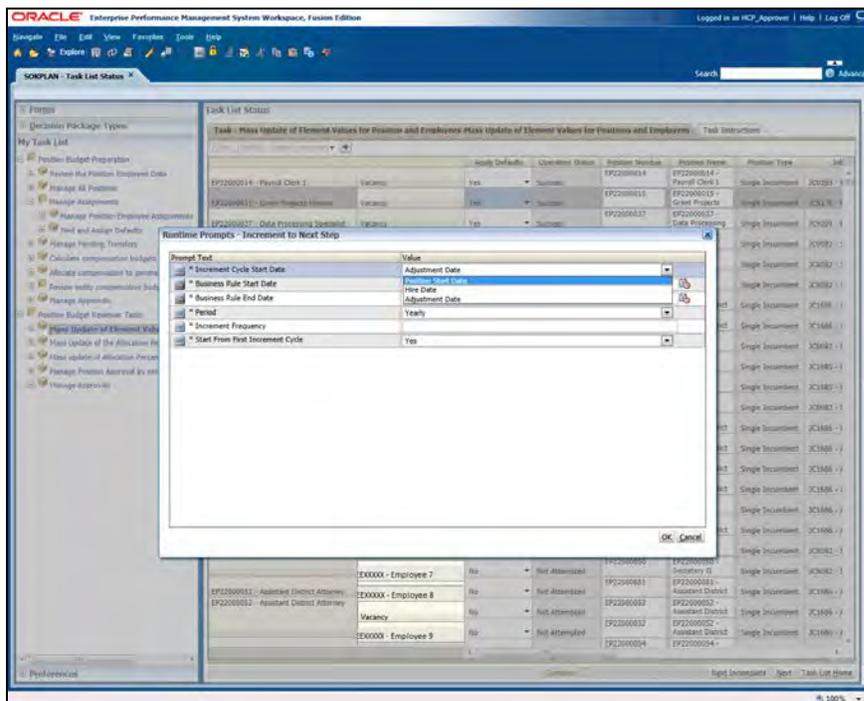
Step	Action
67.	Click the Mass Update of Element Values for Positions and Employees link. Mass Update of Element Values for Positions and Employees
68.	Right-click the EP22000015 - Grant Projects Monitor row header. <div style="border: 1px solid black; padding: 2px; width: fit-content;">EPXXXXXXXX - Position 2</div>
69.	Click the Increment to Next Step menu. <div style="border: 1px solid black; padding: 2px; display: inline-block;"> Increment to Next Step </div>

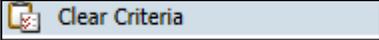


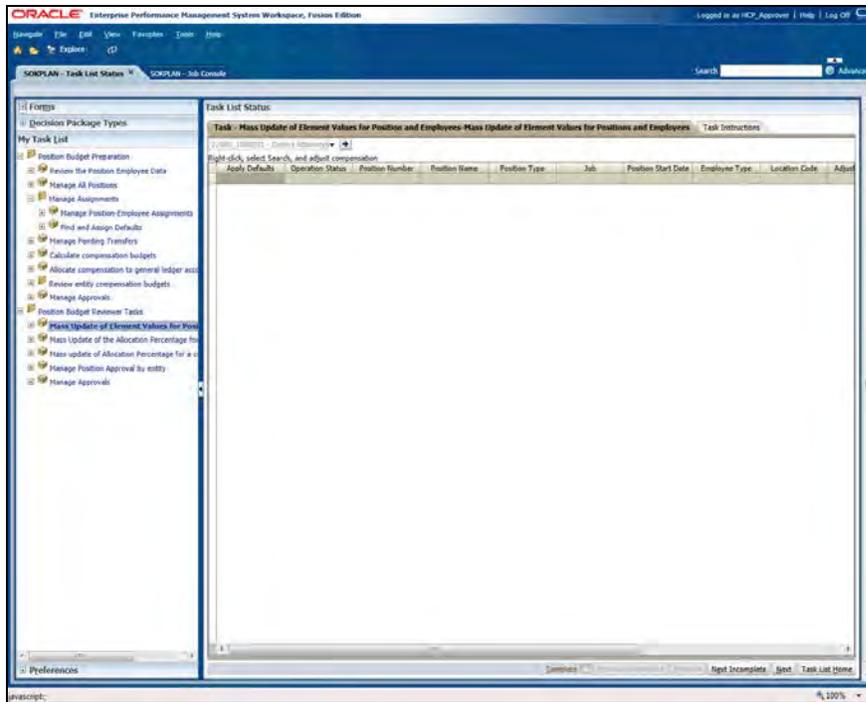
Step	Action
70.	-Enter/Select values for all the fields Increment Cycle Start Date: Position Start Date Business Rule Start Date: 8/4/16 Business Rule End Date: 10/5/16 Period: Yearly Increment Frequency: 1 Start from First Increment Cycle: Yes



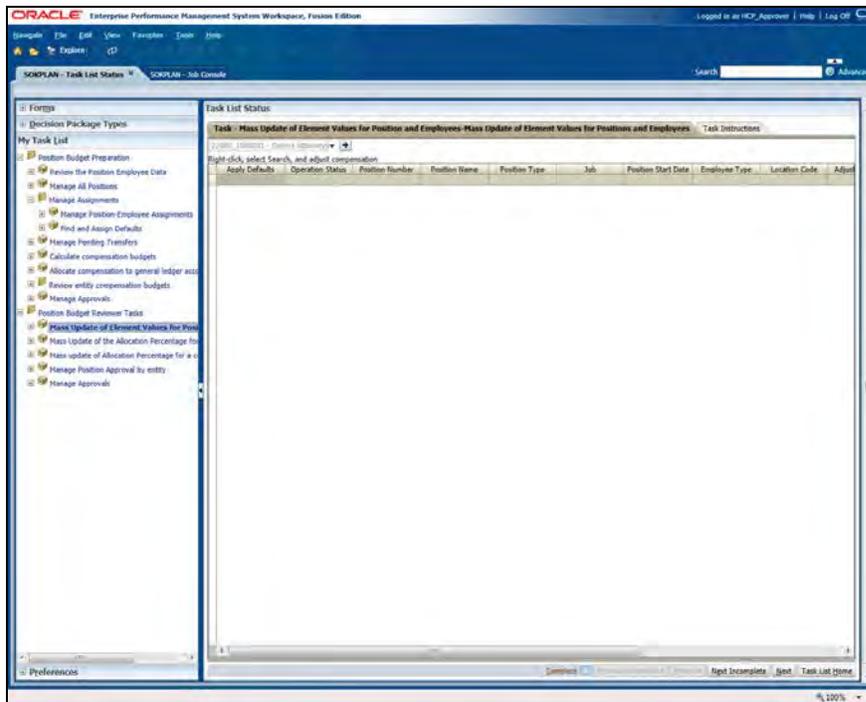
Step	Action
71.	Click the Increment Cycle Start Date list.



Step	Action
72.	Click the Position Start Date list item.
73.	Enter the desired information into the Business Rule Start Date field. Enter " 8/4/16 ".
74.	Enter the desired information into the Value field. Enter " 10/5/16 ".
75.	Click in the Business Rule End Date field.
76.	Enter the desired information into the Increment Frequency field. Enter " 1 ".
77.	Click the OK button. 
78.	A message displays reading: "StepIncrement was successful." Click the Information object. 
79.	E.g.: Right-click the EP22000039 - Secretary II row header.
80.	Click the Search menu. 
81.	Click the Clear Criteria menu. 
82.	A message displays reading: "Clear Criteria was successful." Click the OK button. 



Step	Action
83.	<i>Notice that the search result has cleared</i>

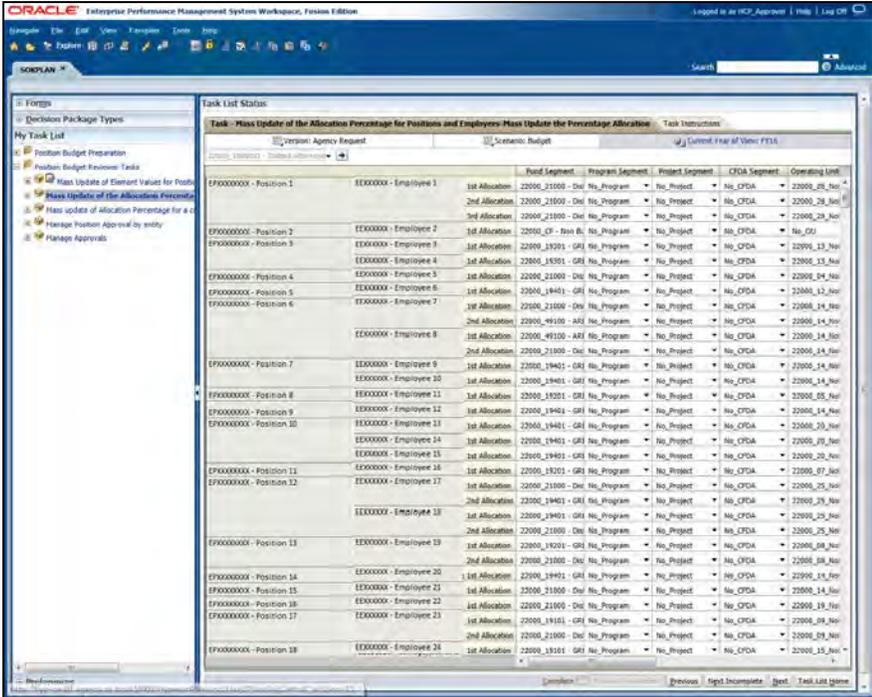


Step	Action
84.	Complete "Mass Update of Element Values for Position and Employees" Task Click the Complete option.
85.	Click the Next button. 
86.	End of Procedure.

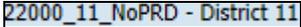
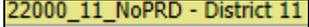
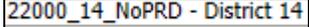
3.31 - Mass update of the Allocation Percentage for Positions and Employees

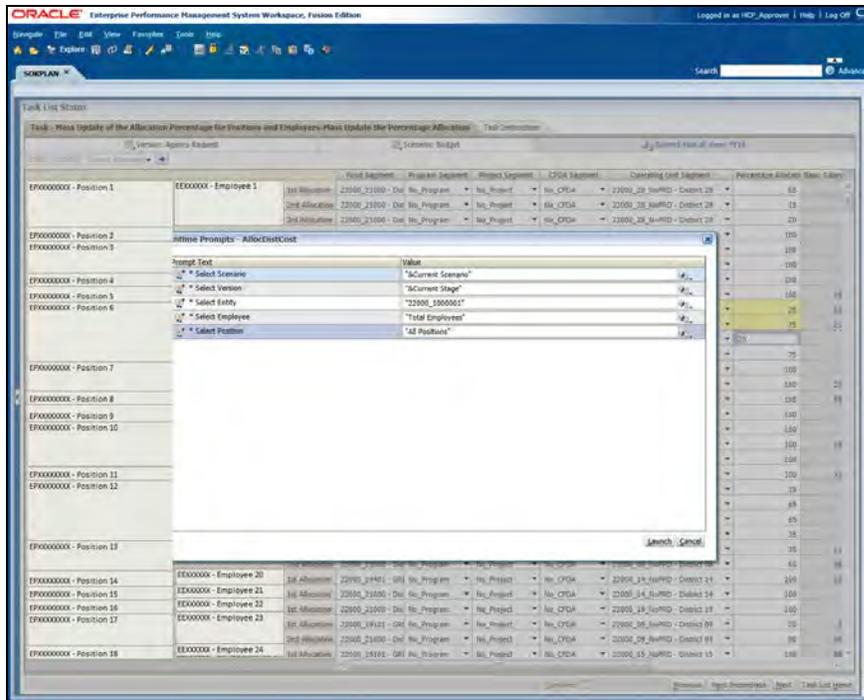
In this topic you will be able to change allocation percentages and see the changes in the Total Compensation as per the updated percentage allocations.

Procedure

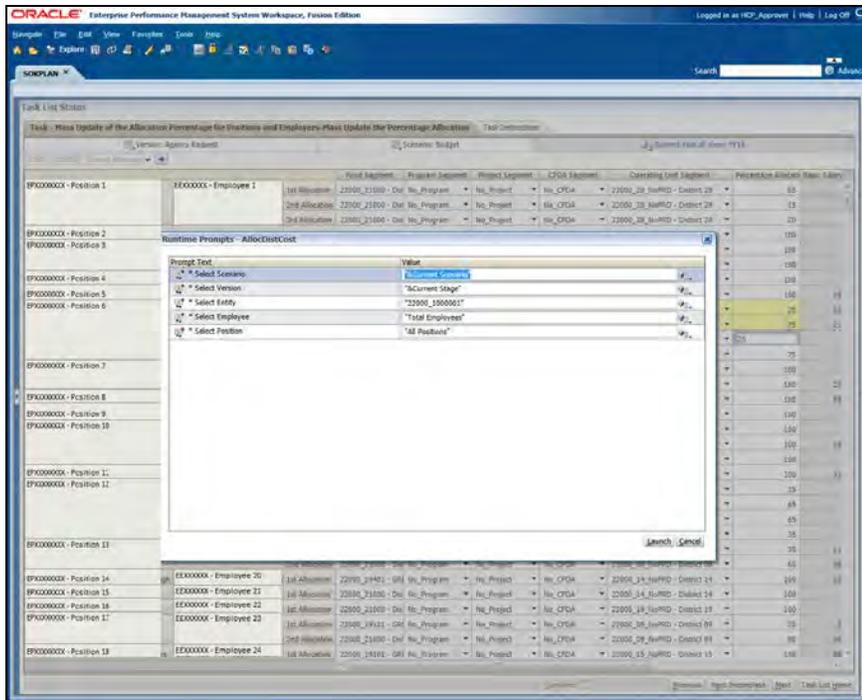


Step	Action
1.	Hide the View Pane (if not already hidden) Click the Collapse Pane button. 

Step	Action
4.	<p>Click the <i>SmartList</i> button for Operating Unit Segment for the position: EP 22000047, Employee: EE140600, Allocation Line: 1st Allocation</p> <p>Click the Operating Unit SmartList button.</p> 
5.	<p><i>E.g.:</i></p> <p>Enter the desired information into the Name field. Enter "22000_".</p>
6.	<p><i>Enter desired information</i></p> <p><i>E.G.:</i></p> <p>Click the 22000_11_NoPRD - District 11 cell.</p> 
7.	<p>Click the Operating Unit Segment cell.</p> 
8.	<p>Press [Ctrl+C].</p>
9.	<p>Click the <i>Operating Unit Segment</i> cell for the position: EP 22000047, Employee: EE140600, Allocation Line: 2nd Allocation</p> <p>Click the Operating Unit Segment cell.</p> 
10.	<p>Press [Ctrl+V].</p>
11.	<p>Click the <i>Percentage Allocation</i> cell for 1st Allocation</p> <p>Click the Percentage Allocation cell.</p> 
12.	<p>Enter the desired information into the Percentage Allocation field. Enter "25".</p>
13.	<p><i>Enter the desired information into the Percentage Allocation field for 2nd Allocation. Enter a valid value e.g. "25".</i></p> <p>Click the Percentage Allocation cell.</p> 
14.	<p>Enter the desired information into the Percentage Allocation field. Enter "75".</p>
15.	<p>Click the File menu.</p> 
16.	<p>Click the Save menu.</p> 



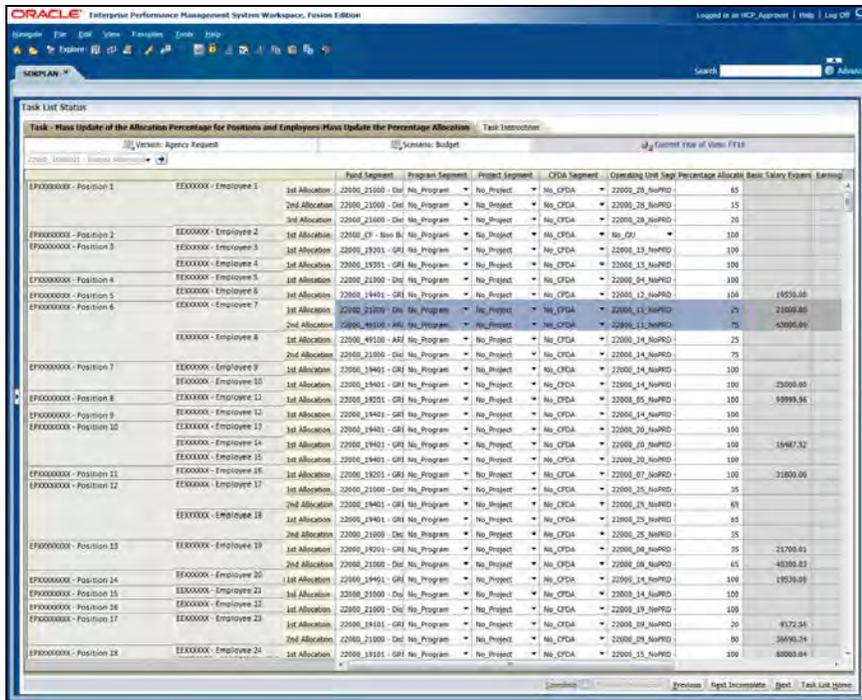
Step	Action
17.	<p>Enter the values:</p> <p>Select Scenario: "Budget"</p> <p>Select Version: "Agency"</p> <p>Select Entity: "22000_1000001"</p> <p>Select Employee: "Total Employees"</p> <p>Select Position: "All Positions"</p>



Step	Action
18.	Enter the desired information into the Select Scenario field. Enter " Budget ".
19.	Enter the desired information into the Select Version field. Enter " Agency ".
20.	Click the Launch button. 

Position	Employee	Fund Segment	Program Segment	Project Segment	CFDA Segment	Operating Unit	Sgl	Percentage Allocated	Basic Salary Expense	Earning
EP0000000 - Position 1	EE000000 - Employee 1	1st Allocation	22000_21000 - Def	No_Program	No_Project	No_CFDA	22000_20_NoPRD	65		
		2nd Allocation	22000_21000 - Def	No_Program	No_Project	No_CFDA	22000_20_NoPRD	15		
EP0000000 - Position 2	EE000000 - Employee 2	1st Allocation	22000_09 - Base B	No_Program	No_Project	No_CFDA	No_CFD	100		
		2nd Allocation	22000_19201 - GRJ	No_Program	No_Project	No_CFDA	22000_19_NoPRD	100		
EP0000000 - Position 3	EE000000 - Employee 3	1st Allocation	22000_19201 - GRJ	No_Program	No_Project	No_CFDA	22000_19_NoPRD	100		
		2nd Allocation	22000_21000 - Def	No_Program	No_Project	No_CFDA	22000_20_NoPRD	100		
EP0000000 - Position 4	EE000000 - Employee 4	1st Allocation	22000_19401 - GRJ	No_Program	No_Project	No_CFDA	22000_19_NoPRD	100		
		2nd Allocation	22000_21000 - Def	No_Program	No_Project	No_CFDA	22000_20_NoPRD	100		
EP0000000 - Position 5	EE000000 - Employee 5	1st Allocation	22000_19401 - GRJ	No_Program	No_Project	No_CFDA	22000_19_NoPRD	100	19000.00	
		2nd Allocation	22000_21000 - Def	No_Program	No_Project	No_CFDA	22000_20_NoPRD	75	63000.00	
EP0000000 - Position 6	EE000000 - Employee 6	1st Allocation	22000_19101 - GRJ	No_Program	No_Project	No_CFDA	22000_19_NoPRD	75		
		2nd Allocation	22000_21000 - Def	No_Program	No_Project	No_CFDA	22000_20_NoPRD	100		
EP0000000 - Position 7	EE000000 - Employee 7	1st Allocation	22000_19101 - GRJ	No_Program	No_Project	No_CFDA	22000_19_NoPRD	100		
		2nd Allocation	22000_21000 - Def	No_Program	No_Project	No_CFDA	22000_20_NoPRD	100	23000.00	
EP0000000 - Position 8	EE000000 - Employee 8	1st Allocation	22000_19401 - GRJ	No_Program	No_Project	No_CFDA	22000_19_NoPRD	100		
		2nd Allocation	22000_21000 - Def	No_Program	No_Project	No_CFDA	22000_20_NoPRD	100	9999.96	
EP0000000 - Position 9	EE000000 - Employee 9	1st Allocation	22000_19401 - GRJ	No_Program	No_Project	No_CFDA	22000_19_NoPRD	100		
		2nd Allocation	22000_21000 - Def	No_Program	No_Project	No_CFDA	22000_20_NoPRD	100		
EP0000000 - Position 10	EE000000 - Employee 10	1st Allocation	22000_19401 - GRJ	No_Program	No_Project	No_CFDA	22000_19_NoPRD	100		
		2nd Allocation	22000_21000 - Def	No_Program	No_Project	No_CFDA	22000_20_NoPRD	100	19407.52	
EP0000000 - Position 11	EE000000 - Employee 11	1st Allocation	22000_19401 - GRJ	No_Program	No_Project	No_CFDA	22000_19_NoPRD	100		
		2nd Allocation	22000_21000 - Def	No_Program	No_Project	No_CFDA	22000_20_NoPRD	100	21000.00	
EP0000000 - Position 12	EE000000 - Employee 12	1st Allocation	22000_19401 - GRJ	No_Program	No_Project	No_CFDA	22000_19_NoPRD	65		
		2nd Allocation	22000_21000 - Def	No_Program	No_Project	No_CFDA	22000_20_NoPRD	35		
EP0000000 - Position 13	EE000000 - Employee 13	1st Allocation	22000_19401 - GRJ	No_Program	No_Project	No_CFDA	22000_19_NoPRD	65		
		2nd Allocation	22000_21000 - Def	No_Program	No_Project	No_CFDA	22000_20_NoPRD	35	21700.00	
EP0000000 - Position 14	EE000000 - Employee 14	1st Allocation	22000_19401 - GRJ	No_Program	No_Project	No_CFDA	22000_19_NoPRD	65	40300.00	
		2nd Allocation	22000_21000 - Def	No_Program	No_Project	No_CFDA	22000_20_NoPRD	100	19000.00	
EP0000000 - Position 15	EE000000 - Employee 15	1st Allocation	22000_21000 - Def	No_Program	No_Project	No_CFDA	22000_20_NoPRD	100		
		2nd Allocation	22000_21000 - Def	No_Program	No_Project	No_CFDA	22000_19_NoPRD	100		
EP0000000 - Position 16	EE000000 - Employee 16	1st Allocation	22000_19201 - GRJ	No_Program	No_Project	No_CFDA	22000_19_NoPRD	100		
		2nd Allocation	22000_21000 - Def	No_Program	No_Project	No_CFDA	22000_20_NoPRD	20	4172.50	
EP0000000 - Position 17	EE000000 - Employee 17	1st Allocation	22000_19101 - GRJ	No_Program	No_Project	No_CFDA	22000_19_NoPRD	90	30490.24	
		2nd Allocation	22000_21000 - Def	No_Program	No_Project	No_CFDA	22000_20_NoPRD	100	80003.04	

Step	Action				
21.	<p>Click on OK on the message that appears. Review the new Basic Salary Expense for the position: EP 22000047 and Employee: EE140600 for the two allocation lines.</p> <table border="1"> <tbody> <tr> <td>25</td> <td>21000.00</td> </tr> <tr> <td>75</td> <td>63000.00</td> </tr> </tbody> </table>	25	21000.00	75	63000.00
25	21000.00				
75	63000.00				

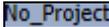
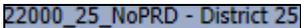
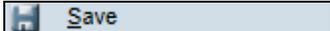
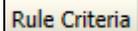


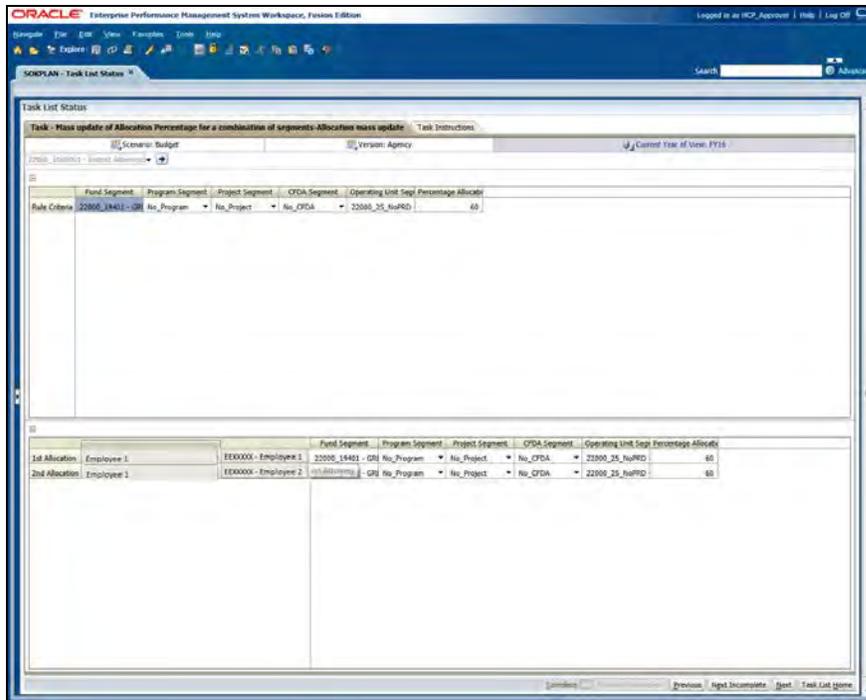
Step	Action
22.	Click the Complete option.
23.	Click the Next button. 
24.	End of Procedure.

3.32 - Mass Update of Allocation Percentage for a combination of Segments

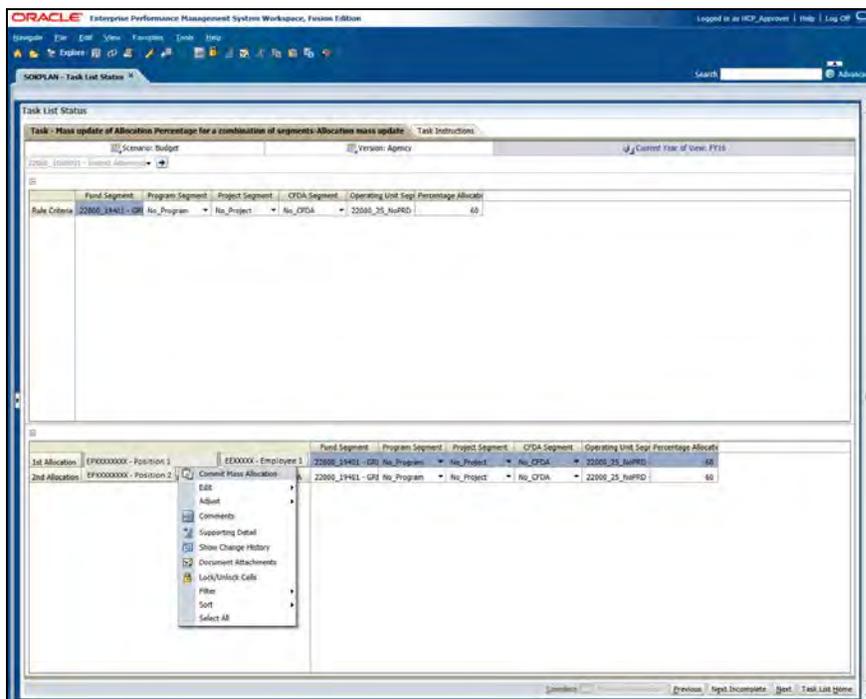
In this topic you will change allocation percentages.
You will review data to verify changes were successful.

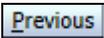
Procedure

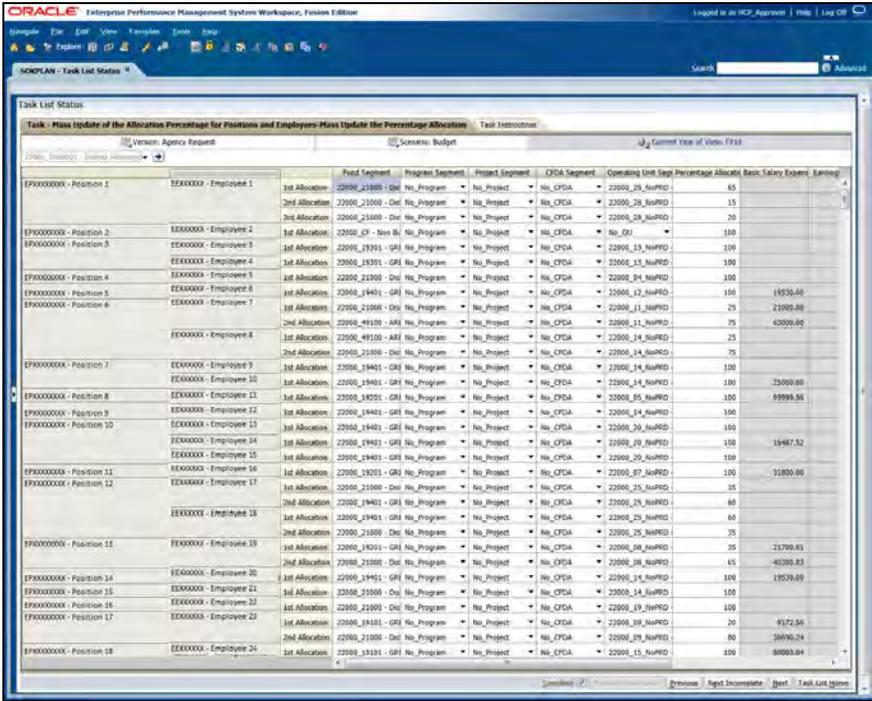
Step	Action
9.	Click the No_Project cell. 
10.	Click the CFDA Segment SmartList button. 
11.	Enter the desired information into the Name field. Enter " no_ ".
12.	Click the No_CFDA cell. 
13.	Click the Operating Unit Segment SmartList button. 
14.	Enter the desired information into the Name field. Enter " 22000_25 ".
15.	Click the 22000_25_NoPRD - District 25 cell. 
16.	Enter the desired information into the Percentage Allocation field. Enter " 60 ".
17.	Click the File menu. 
18.	Click the Save menu. 
19.	<i>A message appears reading: "The data has been saved."</i> Click the OK button. 
20.	<i>Retrieve:</i> Right-click the Rule Criteria row header. 
21.	Click the Retrieve menu. 
22.	<i>Message appears reading "Mass Allocate was successful"</i> Click the OK button. 



Step	Action
23.	<p><i>Commit process:</i></p> <ul style="list-style-type: none"> -Review the retrieved positions and employees -Right click any row in the second form <p>Employee 1</p>

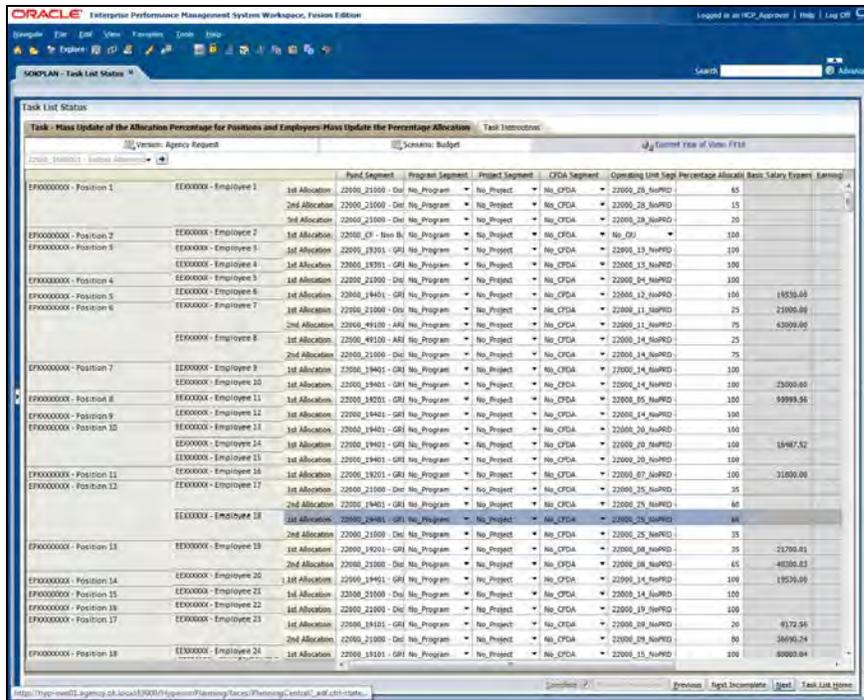


Step	Action
24.	Click the Commit Mass Allocation menu. 
25.	A message displays reading: "Commit was successful." is displayed Click the OK button. 
26.	Click the Previous button. 



Position	Employee	Allocation	Fund Segment	Program Segment	Project Segment	CFDA Segment	Operating Unit	Segt	Percentage Allocatd	Basic Salary Exempt	Rating
EFOXXXXXX - Position 1	EEXXXXX - Employee 1	1st Allocation	22000_19000	GRF No_Program	No_Project	No_CFDA	22000_20	NoPRD	65		
		2nd Allocation	22000_21000	GRF No_Program	No_Project	No_CFDA	22000_20	NoPRD	15		
EFOXXXXXX - Position 2	EEXXXXX - Employee 2	1st Allocation	22000_21000	GRF No_Program	No_Project	No_CFDA	22000_20	NoPRD	20		
		2nd Allocation	22000_21000	GRF No_Program	No_Project	No_CFDA	No_CFDA	No_PRD	100		
EFOXXXXXX - Position 3	EEXXXXX - Employee 3	1st Allocation	22000_19200	GRF No_Program	No_Project	No_CFDA	22000_13	NoPRD	100		
		2nd Allocation	22000_19200	GRF No_Program	No_Project	No_CFDA	22000_13	NoPRD	100		
EFOXXXXXX - Position 4	EEXXXXX - Employee 4	1st Allocation	22000_22000	GRF No_Program	No_Project	No_CFDA	22000_04	NoPRD	100		
		2nd Allocation	22000_22000	GRF No_Program	No_Project	No_CFDA	22000_12	NoPRD	100	19530.00	
EFOXXXXXX - Position 5	EEXXXXX - Employee 5	1st Allocation	22000_21000	GRF No_Program	No_Project	No_CFDA	22000_11	NoPRD	25	22000.00	
		2nd Allocation	22000_49100	GRF No_Program	No_Project	No_CFDA	22000_11	NoPRD	75	43000.00	
EFOXXXXXX - Position 6	EEXXXXX - Employee 7	1st Allocation	22000_49100	GRF No_Program	No_Project	No_CFDA	22000_14	NoPRD	25		
		2nd Allocation	22000_21000	GRF No_Program	No_Project	No_CFDA	22000_14	NoPRD	75		
EFOXXXXXX - Position 7	EEXXXXX - Employee 9	1st Allocation	22000_19400	GRF No_Program	No_Project	No_CFDA	22000_14	NoPRD	100		
		2nd Allocation	22000_19400	GRF No_Program	No_Project	No_CFDA	22000_14	NoPRD	100	23000.00	
EFOXXXXXX - Position 8	EEXXXXX - Employee 10	1st Allocation	22000_19400	GRF No_Program	No_Project	No_CFDA	22000_05	NoPRD	100	99999.99	
		2nd Allocation	22000_19400	GRF No_Program	No_Project	No_CFDA	22000_04	NoPRD	100		
EFOXXXXXX - Position 9	EEXXXXX - Employee 11	1st Allocation	22000_19400	GRF No_Program	No_Project	No_CFDA	22000_20	NoPRD	100		
		2nd Allocation	22000_19400	GRF No_Program	No_Project	No_CFDA	22000_20	NoPRD	100	19487.52	
EFOXXXXXX - Position 10	EEXXXXX - Employee 12	1st Allocation	22000_19400	GRF No_Program	No_Project	No_CFDA	22000_07	NoPRD	100		
		2nd Allocation	22000_19400	GRF No_Program	No_Project	No_CFDA	22000_07	NoPRD	100	21800.00	
EFOXXXXXX - Position 11	EEXXXXX - Employee 14	1st Allocation	22000_21000	GRF No_Program	No_Project	No_CFDA	22000_25	NoPRD	25		
		2nd Allocation	22000_19400	GRF No_Program	No_Project	No_CFDA	22000_25	NoPRD	80		
EFOXXXXXX - Position 12	EEXXXXX - Employee 15	1st Allocation	22000_19400	GRF No_Program	No_Project	No_CFDA	22000_20	NoPRD	60		
		2nd Allocation	22000_21000	GRF No_Program	No_Project	No_CFDA	22000_20	NoPRD	35		
EFOXXXXXX - Position 13	EEXXXXX - Employee 16	1st Allocation	22000_19200	GRF No_Program	No_Project	No_CFDA	22000_08	NoPRD	95	21780.01	
		2nd Allocation	22000_21000	GRF No_Program	No_Project	No_CFDA	22000_08	NoPRD	65	40380.83	
EFOXXXXXX - Position 14	EEXXXXX - Employee 17	1st Allocation	22000_19400	GRF No_Program	No_Project	No_CFDA	22000_14	NoPRD	100	19530.00	
		2nd Allocation	22000_21000	GRF No_Program	No_Project	No_CFDA	22000_14	NoPRD	100		
EFOXXXXXX - Position 15	EEXXXXX - Employee 20	1st Allocation	22000_21000	GRF No_Program	No_Project	No_CFDA	22000_19	NoPRD	100		
		2nd Allocation	22000_21000	GRF No_Program	No_Project	No_CFDA	22000_19	NoPRD	100		
EFOXXXXXX - Position 16	EEXXXXX - Employee 21	1st Allocation	22000_19400	GRF No_Program	No_Project	No_CFDA	22000_08	NoPRD	20	9172.94	
		2nd Allocation	22000_21000	GRF No_Program	No_Project	No_CFDA	22000_08	NoPRD	80	26950.24	
EFOXXXXXX - Position 17	EEXXXXX - Employee 22	1st Allocation	22000_19400	GRF No_Program	No_Project	No_CFDA	22000_15	NoPRD	100	80000.04	
		2nd Allocation	22000_21000	GRF No_Program	No_Project	No_CFDA	22000_15	NoPRD	100		
EFOXXXXXX - Position 18	EEXXXXX - Employee 23	1st Allocation	22000_19400	GRF No_Program	No_Project	No_CFDA	22000_15	NoPRD	100		
		2nd Allocation	22000_21000	GRF No_Program	No_Project	No_CFDA	22000_15	NoPRD	100		

Step	Action
27.	Review that the Employees EE129215, EE147866 have 2nd allocation and 1st allocation respectively. Percentage allocation has changed from 65 to 60



Step	Action
28.	Click the Next button. <input type="button" value="Next"/>
29.	<i>Complete "Mass update of Allocation Percentage for a combination of segments" Task</i> Click the Complete option.
30.	Click the Next button. <input type="button" value="Next"/>
31.	End of Procedure.

3.33 - Manage Position Approval by Entity

In this topic you will approve new positions still awaiting approval.
 Tester will verify, on screen, that the new position now states "Approved".

Procedure

ORACLE Enterprise Performance Management System WorkSpace, Fusion Edition

Task List Status

Task - Manage Position Approved by entity Manage Position Approvals

Current Year: FY18

Position Number	Position Name	Position Type	Job	Position Start Date	No. Year	Position End Date	Periods Label	Location Code	Adjustment Date	Salary E
EP2200003	EP2200003 - Data Processing Specialist	Single Incumbent	X9305 - Data Proc	1/1/93			Filed	L22000_1 - District		Annual
EP2200010	EP2200010 - Grant Projects Monitor							AB		
EP2200014	EP2200014 - Payroll Clerk I	Single Incumbent	X0293 - Payroll Cl	5/15/94				L22000_1 - District		Annual
EP2200015	EP2200015 - Grant Projects Monitor	Single Incumbent	X0170 - Grant Pro	5/13/94				L22000_1 - District		Annual
EP2200026	EP2200026 - Recruitment/Training Officer							AB		
EP2200027	EP2200027 - Data Processing Specialist	Single Incumbent	X0205 - Data Proc	5/13/94				L22000_1 - District		Annual
EP2200039	EP2200039 - Secretary II	Single Incumbent	X0302 - Secretary	4/1/07			Filed	L22000_2501 - Dist		Annual
EP2200040	EP2200040 - Secretary II	Single Incumbent	X0303 - Secretary	10/20/80			Vacant	L22000_1401 - Dist		Annual
EP2200041	EP2200041 - Assistant District Attorney	Single Incumbent	X0186 - Assistant	1/6/73			Filed	L22000_1301 - Dist		Annual
EP2200042	EP2200042 - Secretary II	Single Incumbent	X0302 - Secretary	2/1/07			Filed	L22000_0701 - Dist		Annual
EP2200043	EP2200043 - Secretary II	Single Incumbent	X0302 - Secretary	1/1/93				L22000_0401 - Dist		Annual
EP2200044	EP2200044 - Assistant District Attorney, Fin	Single Incumbent	X0186 - Asst Dist	1/1/07			Filed	L22000_0404 - Dist		Annual
EP2200045	EP2200045 - Secretary II	Single Incumbent	X0302 - Secretary	9/13/04			Filed	L22000_2701 - Dist		Annual
EP2200046	EP2200046 - Assistant District Attorney	Single Incumbent	X0186 - Assistant	3/1/07			Filed	L22000_1301 - Dist		Annual
EP2200047	EP2200047 - Assistant District Attorney, High	Single Incumbent	X0186 - Assistant	2/1/07			Partially Filled	L22000_1401 - Dist		Annual
EP2200048	EP2200048 - Assistant District Attorney	Single Incumbent	X0186 - Assistant	6/2/04			Vacant	L22000_1401 - Dist		Annual
EP2200050	EP2200050 - Secretary II	Single Incumbent	X0302 - Secretary	11/15/01			Filed	L22000_1401 - Dist		Annual
EP2200051	EP2200051 - Assistant District Attorney							AB		
EP2200052	EP2200052 - Assistant District Attorney	Single Incumbent	X0186 - Assistant	8/1/06			Filed	L22000_0502 - Dist		Annual
EP2200054	EP2200054 - Secretary II	Single Incumbent	X0302 - Secretary	5/27/13			Vacant	L22000_1401 - Dist		Annual
EP2200055	EP2200055 - Assistant District Attorney, Fin	Single Incumbent	X0186 - Asst Dist	11/2/13			Partially Filled	L22000_2901 - Dist		Annual
EP2200056	EP2200056 - Secretary II	Single Incumbent	X0302 - Secretary	12/17/03			Filed	L22000_0701 - Dist		Annual
EP2200057	EP2200057 - Assistant District Attorney	Single Incumbent	X0186 - Assistant	6/1/07			Vacant	L22000_2504 - Dist		Annual

Step	Action
1.	Use the vertical scroll bar to scroll through the form 
2.	Use the horizontal scroll bar to scroll through the form

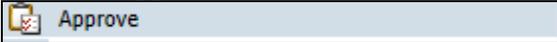
ORACLE Enterprise Performance Management System WorkSpace, Fusion Edition

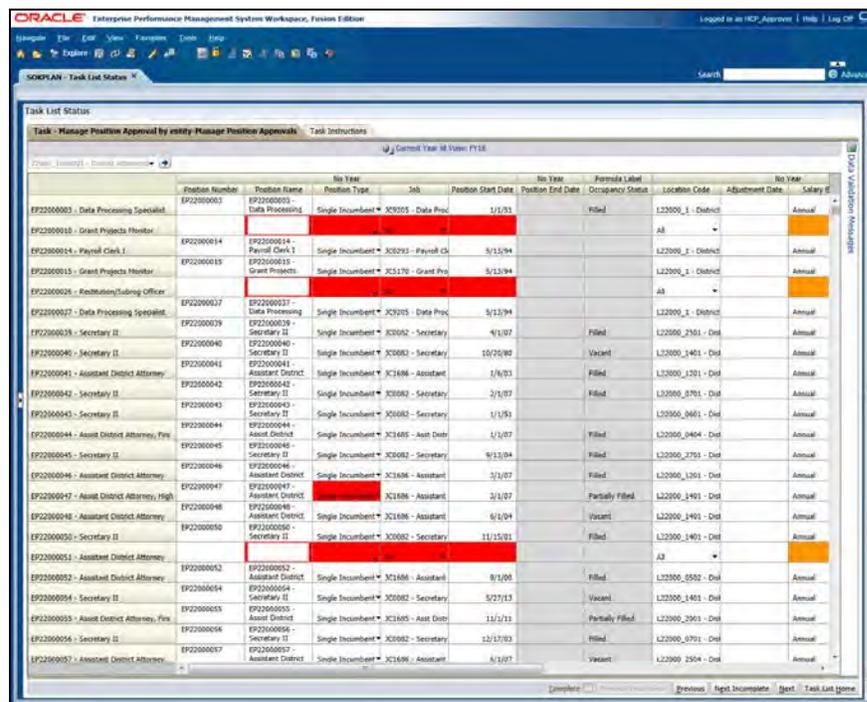
Task List Status

Task - Manage Position Approved by entity Manage Position Approvals

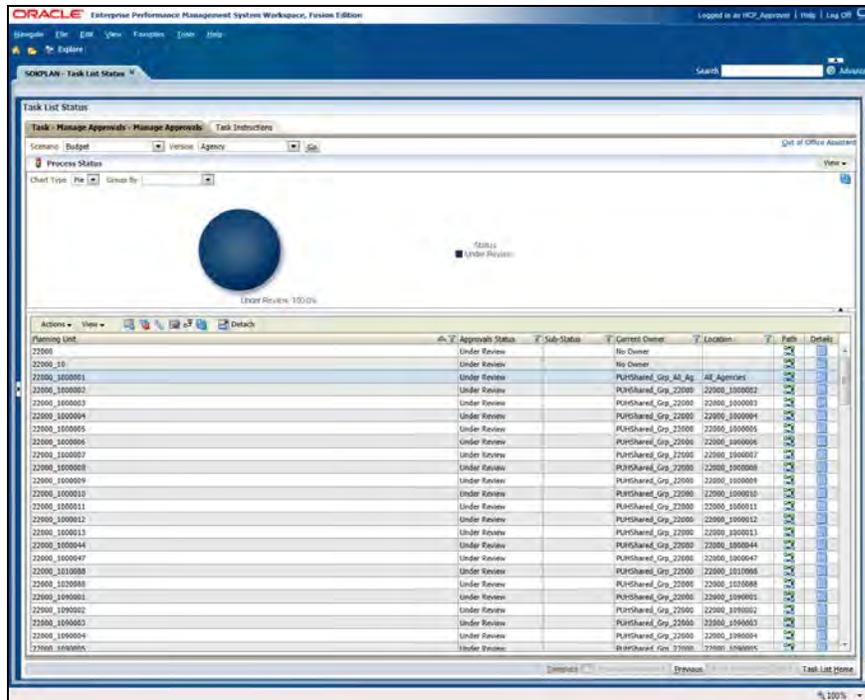
Current Year: FY18

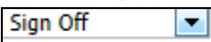
Pos Code	Adjustment Date	No. Year	Salary Basis	Default Weekly Hrs	Approval Comment	FY16	FY16	FY16	FY16	FY16
						Approved Status	Available FTE	Total FTE	Headcount	Monthly Spread Fac
EP22001519	1401 - Dist	Annual		40		Approved	0	1	1	1
EP22001531	0701 - Dist	Annual		40		Approved	1	1	1	1
EP22001532	2504 - Dist	Annual		40		Approved	0	1	1	1
EP22001523	1200 - Dist	Annual		40		Approved	1	1	1	1
EP22001524	0701 - Dist	Annual		40		Approved	0.5	1	1	1
EP22001525	0501 - Dist	Annual		40		Approved	1	1	1	1
EP22001527	0701 - Dist	Annual		40		Approved	0	1	1	1
EP22001529	0701 - Dist	Annual		40		Approved	1	1	1	1
EP22001530						Approved	1	1	1	1
EP22001532	0701 - Dist	Annual		40		Approved	1	1	1	1
EP22001533	1401 - Dist	Annual		40		Approved	1	1	1	1
EP22001534	1401 - Dist	Annual		40		Approved	1	1	1	1
EP22001535	0701 - Dist	Annual		40		Approved	1	1	1	1
EP22001537	0401 - Dist	Annual		40		Approved	0	1	1	1
EP22001539	0701 - Dist	Annual		40		Approved	1	1	1	1
EP22001540	1 - District	Annual		40		Approved	1	1	1	1
EP22001545	0701 - Dist	Annual		40		Approved	1	1	1	1
EP22001475	0701 - Dist	Annual		40		Approved	0	1	1	1
EP22001476	1401 - Dist	Annual		40		Approved	1	1	1	1
EP22001478						Approved	1	1	1	1
EP22001480						Approved	1	1	1	1
New Position 1	1801 - Dist	Annual		40				1	1	1
All Positions							342.19999999	1018.5	691	

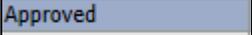
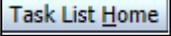
Step	Action
3.	<p><i>E.g.:</i></p> <p>Right-click the New Position 1 row header.</p> 
4.	<p>Click the Approve menu.</p> 
5.	Enter the desired information into the Value field. Enter " FY16 ".
6.	Enter the desired information into the Comments field. Enter " Approved ".
7.	Click the Confirm button.
	
8.	<p>A message appears reading: "<i>Approve was successful.</i>"</p> <p>Click the OK button.</p> 



Step	Action
9.	Use the vertical scroll bar to scroll to the bottom of the page
10.	Use the horizontal scroll bar to scroll to the right of the page



Step	Action
1.	Select the lowest level planning unit E.g.: Click the 22000_1000001 cell.
2.	Click the Actions menu. 
3.	Click the Change Status menu. 
4.	Click the Select Action list. 
5.	Click the Approve list item. 
6.	Click the Select Next Owner list. 
7.	Click the <Automatic> list item. 
8.	Enter the desired information into the field. Enter " Approving Planning Unit: Budget, Agency, 22000_1000001 ".
9.	Click the OK button. 

Step	Action
10.	Click the OK button. 
11.	<i>Review the Approval Status has changed to "Approved"</i> Click the Approvals Status cell. 
12.	Click the Complete option.
13.	Click the Task List Home button. 
14.	Click the Collapse object.
15.	Click the Log Off object. 
16.	Click the Yes button. 
17.	End of Procedure.