State of Oklahoma CORE Project

Course P301 – Part I
MANAGING POSITIONS

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HR COURSE P301 - MANAGING POSITIONS

OVERVIEW

PeopleSoft Human Resources employs its integrated, table-driven design to help your organization keep an effective-dated history of all positions, regardless of whether they are filled.

The State of Oklahoma has chosen to use Position Management. This requires that the position be properly configured prior to being associated with an employee. Position Management allows you to set up all the position data in advance. When an employee is hired, he is assigned to a position, and the system uses the position information to fill out several fields in the job data record. This process saves time and reduces errors for those involved in the Hiring process.

When new positions are created, PeopleSoft Human Resources uses data that was entered in the Department and Job Code Tables to insert the default values into several position data fields. Defaults can be overridden to enter exceptions for a particular position. Positions are actually established in the system by the Office of Personnel Management. However, agencies will have certain responsibilities for updating and maintaining some position data.

Positions are defined on the Position Data pages, where you will create and maintain position data. After a position is allocated and established, you will be able to update certain data related to it, such as work location, department, and shift information. Other information is protected and will be updated either through changes to other tables or possibly through the position allocation process.

The Position Data component contains five pages.

Description	Position effective date, status, reason for action (new position, allocation, etc.).
Work Location	Location-specific information such as company (Agency) and department.
Job Information	Information about the job associated with the position, such as job code, regular or temporary, and full or part time.
Specific Information	Information on maximum head count and whether the position is budgeted.
Budget and Incumbents	The position's current budget and incumbents.

Valid Reasons for adding/updating position information are:

Reason Code	Description	When To Use.
INA	Position Inactivated	Use to update the position Status from Active to Inactive (Abolished).
ALC	Allocation	Use to indicate that the assigned job code has been updated when a position is audited after it was initially established.
NEW	New Position	Used only by OPM when a new position is established.
DRC	Direct Reclassification	Use to update the assigned level on the Job Code of a classified position only as directed by OPM.
LVL	Level Change	Used by an agency to reflect the assigned JFD level of a classified position.
UPD	Position Data Update	Use when making updates to work location, department, FTE or other data *not* associated with a position allocation.
XFR	Transfer	Use to transfer a position from one agency to another - usually only as a result of legislation.

OBJECTIVES

At the completion of this section, you will be familiar with the processes used to:

Create New Positions

- Classified
- Unclassified

Update Existing Positions

- Inactivate
- Allocate Positions and Update Job Codes
- Update Department or Location

Position Inquiries

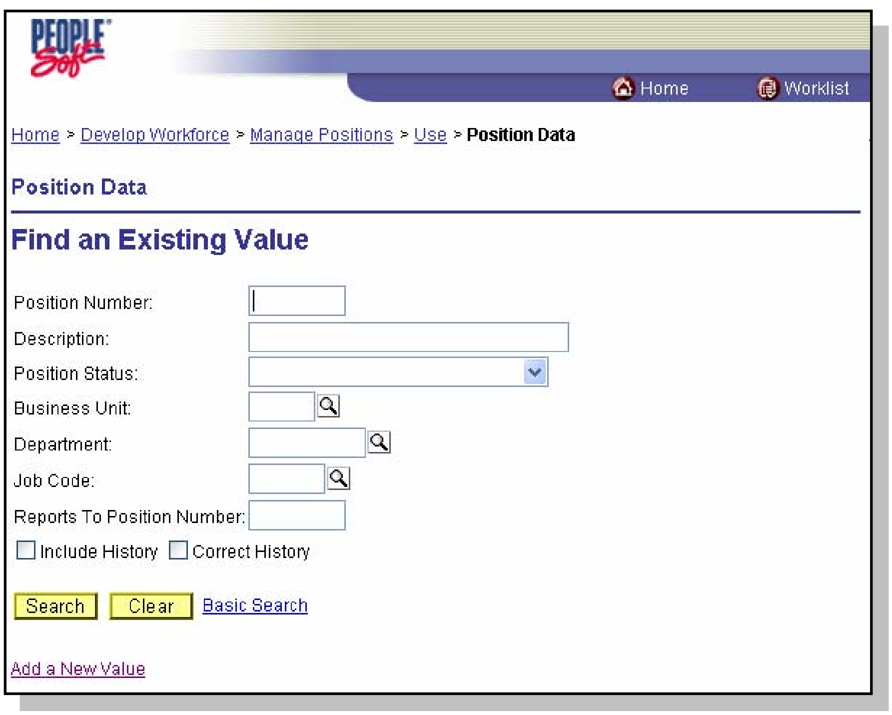
Run a standard Report

ADD A NEW POSITION

New positions will be added to the system only by designated personnel in the Office of Personnel Management upon receipt of required information from an agency. The number of positions an agency is authorized to establish is generally limited to the FTE limits set by the legislature. Exceptions are permitted for positions specifically exempted from FTE limits, such as seasonal, Carl Albert Executive Fellows, and other agency-specific exceptions. New classified positions are established upon receipt of an OPM-39 for a position audit or as requested by an agency which has been delegated position allocation authority. Unclassified positions are established only by the Office of Personnel Management upon receipt of a request from an agency, verification of the unclassified authorization for the position, and verification that it is within the established FTE limits.

To add a new position:

Navigation: *Develop Workforce > Manage Positions > Use > Position Data*



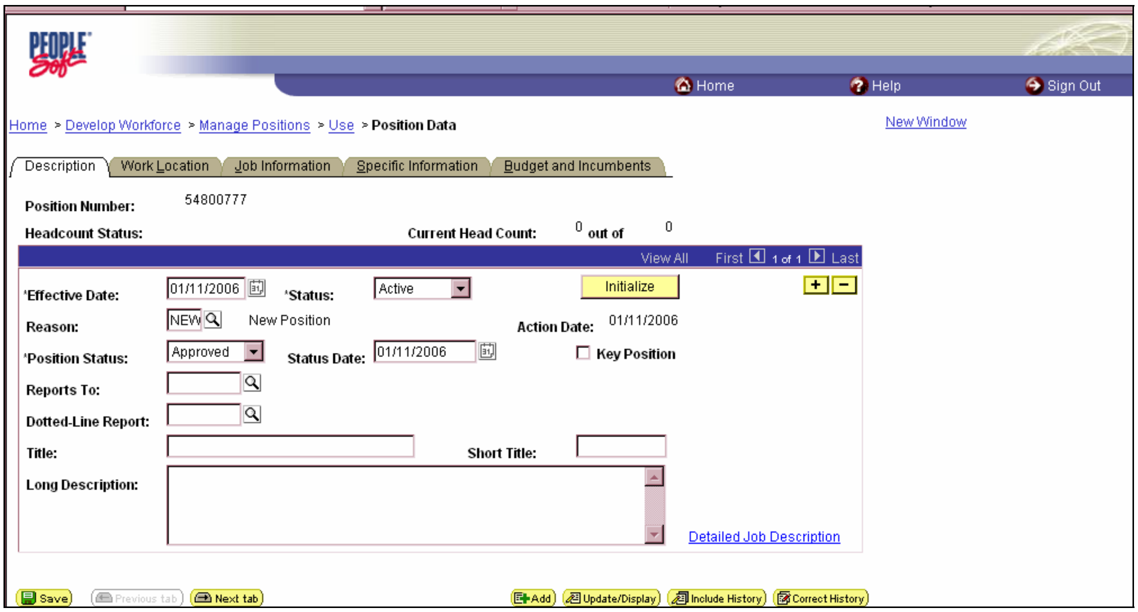
To add a new position, click on the **Add a New Value** hyperlink for a new page which will allow you to enter a new position number.

The following page will be displayed.

NOTE: OPM will assign Position Numbers. The first three digits will reflect the company (agency) number. (Example: 54800001) The next 5 numbers are simply assigned in numerical sequence as new positions are established.

Input the assigned number in the **Position Number** field. Then click the Add button. The following page will be displayed.

POSITION DATA – DESCRIPTION



Effective Date – Enter the date the new position becomes effective. The default is the current date (system date). Note: A position must be allocated and established before an employee can be assigned to it.

Status – Defaults to Active. Indicates whether the status of the position is Active or Inactive.

Initialize – This button is displayed only when adding a new position. Click Initialize to copy the characteristics of a similar existing position. When clicked, a dialog box prompts for the number of the position you want to copy. Click OK to populate the Position Data component with the information of the position you selected. Override any information that does not apply to the new position.

Reason – Rationale for creating the new position. Since a new position is being created, the system defaults to NEW.

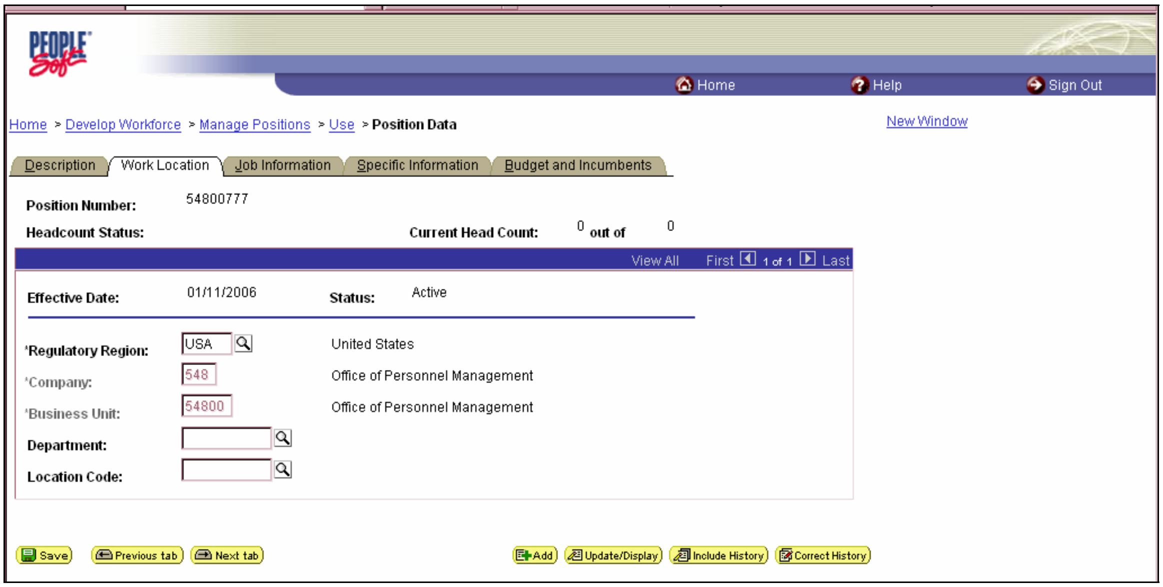
Position Status – Indicates whether the position is **Approved**, Frozen, or Proposed. The State of Oklahoma will be using **Approved**.

Status Date – Displays the date that a position first held a particular Status value. For a new Position, the **Status Date** will be the same as the **Effective Date**. The system defaults the **Effective Date** into this field.

Reports To information and **Description** information are not currently being used.

Click on the **'Work Location'** tab.

POSITION DATA - WORK LOCATION



Regulatory Region – Defaults to *USA*.

Company – Defaults from the first three digits of the position number number. This number will be the same as the Agency number. This information is not subject to update.

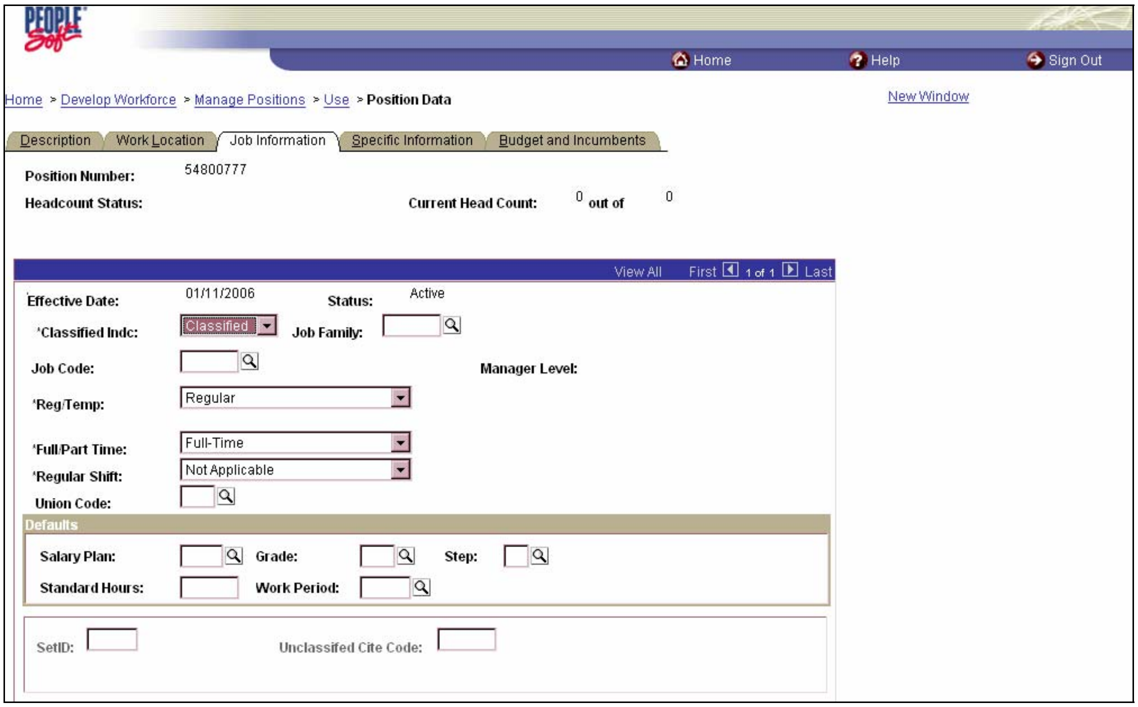
Business Unit – The Business Unit number defaults from the Company number. This number will be the same as the Company (Agency) number with two additional zeros. Example: Agency 025 = Business Unit 02500. This information is not subject to update.

Department – From the list of available options, select the Department this position is associated with. Use the Lookup (magnifying glass) to see the available options. The agency must provide this information to OPM. Agencies will be able to make updates to this information.

Location Code – The Location Code identifies the physical location where the person who will occupy this position will work. Use the Lookup to search for the associated Location Code. The agency must provide this information to OPM. Agencies will be able to make updates to this information.

Click the **'Job Information'** tab.

POSITION DATA - JOB INFORMATION



Classified Indicator – Select 'Classified' for a classified position **or** 'Unclassified' if the position is to be unclassified. To establish an unclassified position, a valid unclassified authorization will be required.

If the Position is Classified:
Job Family – Enter the Job Family (first 3 characters of the 4-character code for job family and level) determined for the position as the result of the position audit.

Job Code – Job code will default from Job Family at Level I [A]. Example: Job Family = E24, Job Code will default to E24A. After the position is established, this may be updated by the agency as a result of their level review.

If the Position is Unclassified:
Job Family – Job Family does not apply and should remain blank.

Job Code – Enter the Job Code for the position. This is determined by the agency and must be included in the request for the position.

System Defaults

- **Reg / Temp** – Indicates whether this is a regular position or a temporary position. Other options used by the State of Oklahoma include: Project, Seasonal, or Student.

- **Full / Part** – Indicates whether the position is full- or part-time.

Once the **Job Code** is entered, the following fields are defaulted:

Salary Plan, Grade, Standard Hours, Work Period – Indicating the salary components and hours for this position.

Verify that the values are correct and change if necessary.

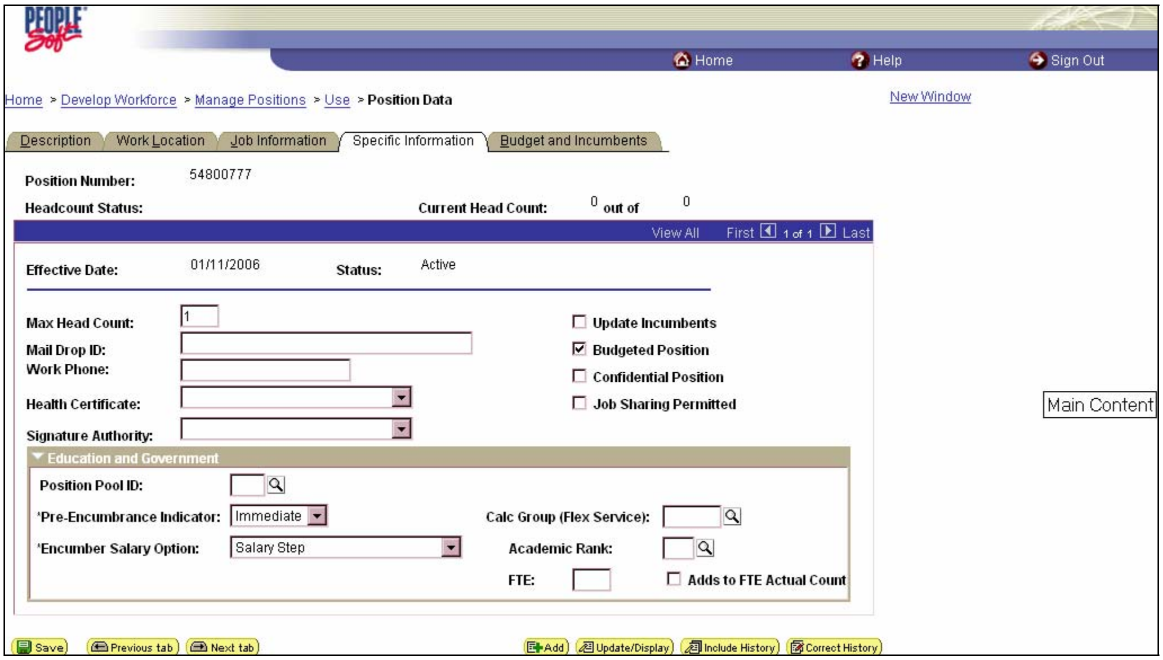
SetID and **Unclassified Cite Code** – If this is an Unclassified position, select the **SetID** for the agency (agency code plus 2 zeros) and **Unclassified Cite Code** authorizing the position. Use Lookup to identify authorized codes.

The complete list of **Unclassified Cite Codes** may be viewed in *Administer Workforce > Administer Workforce (GBL) > Setup > Unclassified Cite Codes.*

Click on the ‘**Specific Information’** tab.

POSITION DATA - SPECIFIC INFORMATION

Some values on the Specific Information page affect how information is processed through the system.



Enter information into the following fields:

Maximum Head Count – Enter the maximum head count allowed for this position. This would normally be one.

Update Incumbents – This should always remain **‘unchecked’**. Incumbent data is not automatically updated since posting requirements may have to be met and qualifications must be certified.

Budgeted Position – This should be checked **‘on’** so the system knows that this is a budgeted position.

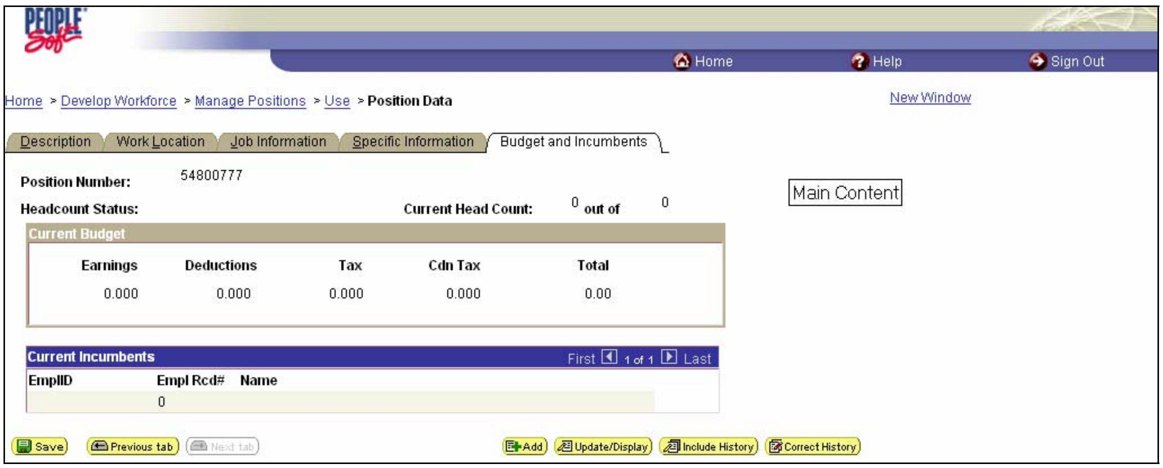
CLICK THE DROPDOWN ARROW NEXT TO *Education and Government* ***TO ENTER FTE INFORMATION.*** **FTE** - Enter the FTE value for this position to be used for defining an FTE budget.

Adds to FTE Actual Count – Select to include this position when processing FTE edits for budgeting and report purposes.

Click the **'Budget and Incumbents'** tab.

POSITION DATA - BUDGET AND INCUMBENTS

The Budget and Incumbents page is used to view the position's current budget and incumbents. Since this is a new position, there will be no incumbents.



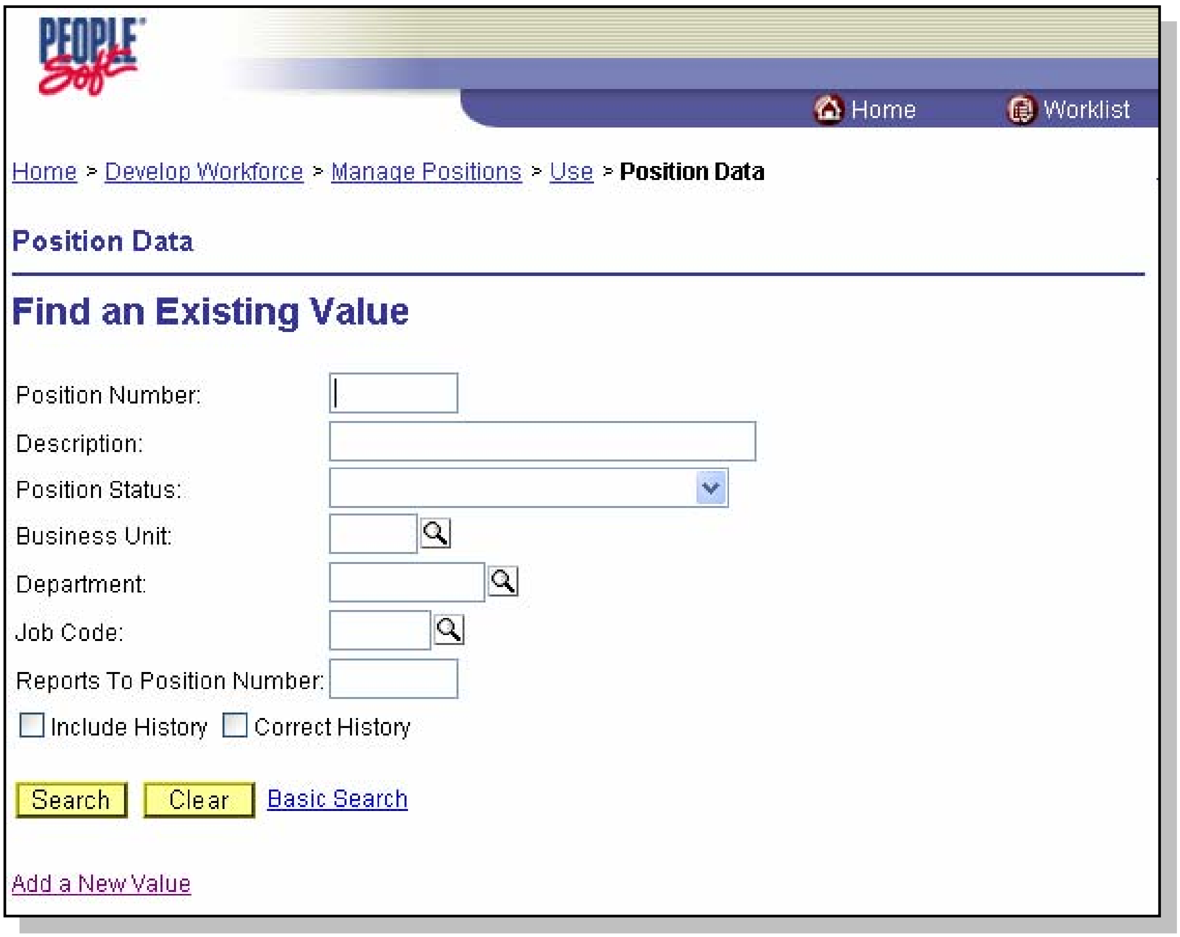
Current Incumbents – When employees have been assigned to the position in Job Data, the group box will display the **Employee ID**, **Employee Record Number,** and **Name**.

Click Save to save the new position in the system.

UPDATING POSITION DATA

Position information (including allocations) is updated in PeopleSoft by inserting effective-dated rows. This allows you to keep a chronological history of all the updates made to the position without losing any of the data that was already in the record. Future dated rows can also be inserted. To update a position follow the navigation listed below:

Navigation: *Develop Workforce > Manage Positions > Use > Position Data*



Enter the **Position Number** and cClick the 

button.

Once you have selected the position number you wish to work with, the **Description** page will be displayed.

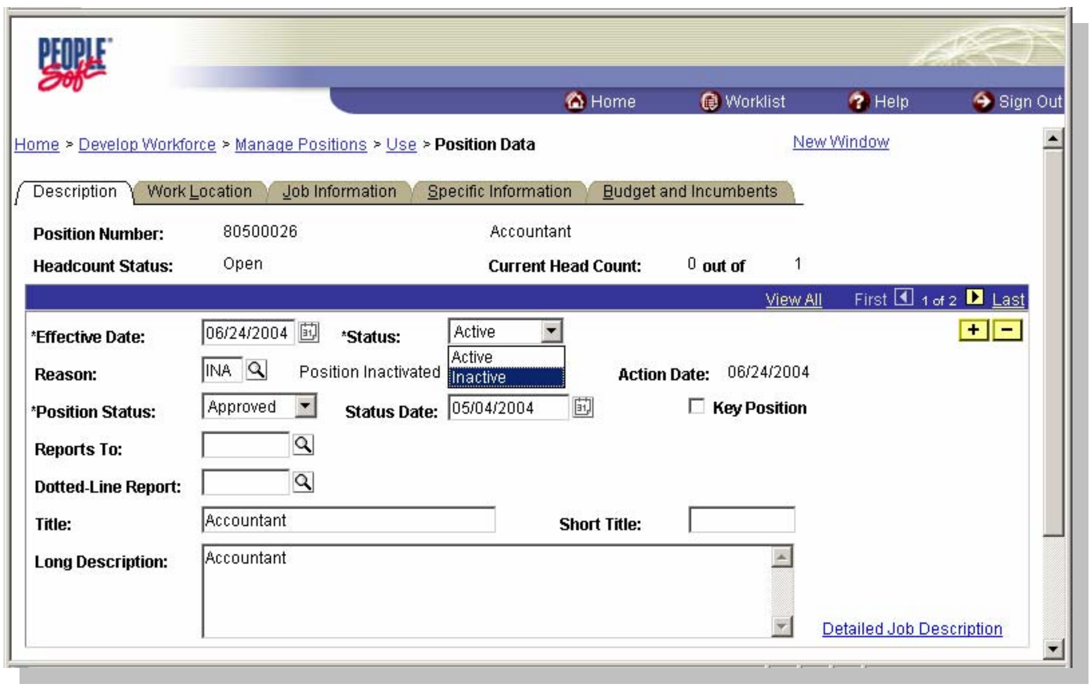
The search process described above is used to find the correct position record for any update to position information: Inactivating (abolishing) a Position, allocating a position after a position audit, assigning a level, making a Department or Location update, etc.

INACTIVATE A POSITION

Select a position by searching for the Position Number as directed in “Updating Position Data”.

To inactivate a position, use only the **Description** page. Only OPM is authorized to inactivate a position.

POSITION DATA - DESCRIPTION



Click the **‘Insert Row’** [+] button.

Effective Date – Verify today’s date, or change if necessary.

Status – Change to ‘Inactive’.

Reason – Select ‘INA’ – Position Inactivated.

Click [Save] to save the updates.

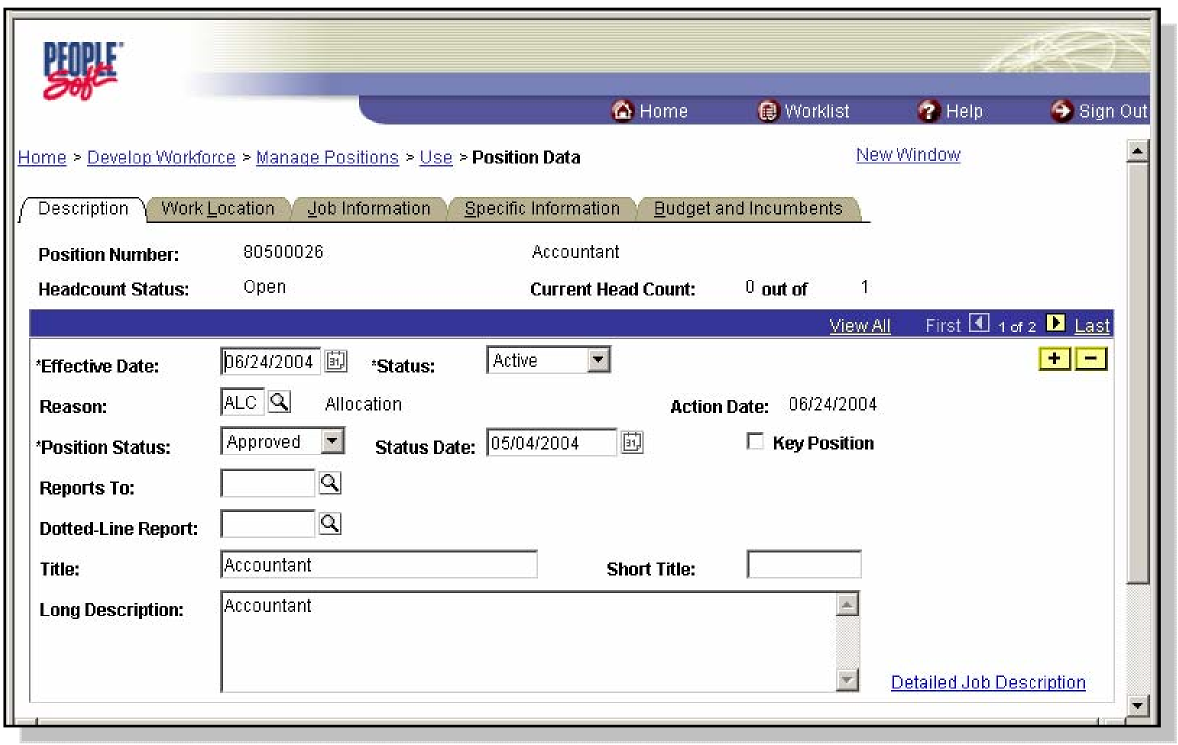
ALLOCATE A POSITION

When a new position is created, or after a position audit is completed, the allocation information is entered to show the Job Family to which the position has been assigned. Only OPM or an agency with position delegation authority will be able to allocate classified positions to a job family.

Use the process described in "Updating Position Data" to find the correct position.

Only the **Description** and **Job Information** pages are needed to enter allocation information. However, other updates such as department or location may be made if needed. The Job Family Descriptor (JFD) may be updated if the allocation is done by OPM or an agency with delegation authority to allocate positions.

POSITION DATA - DESCRIPTION



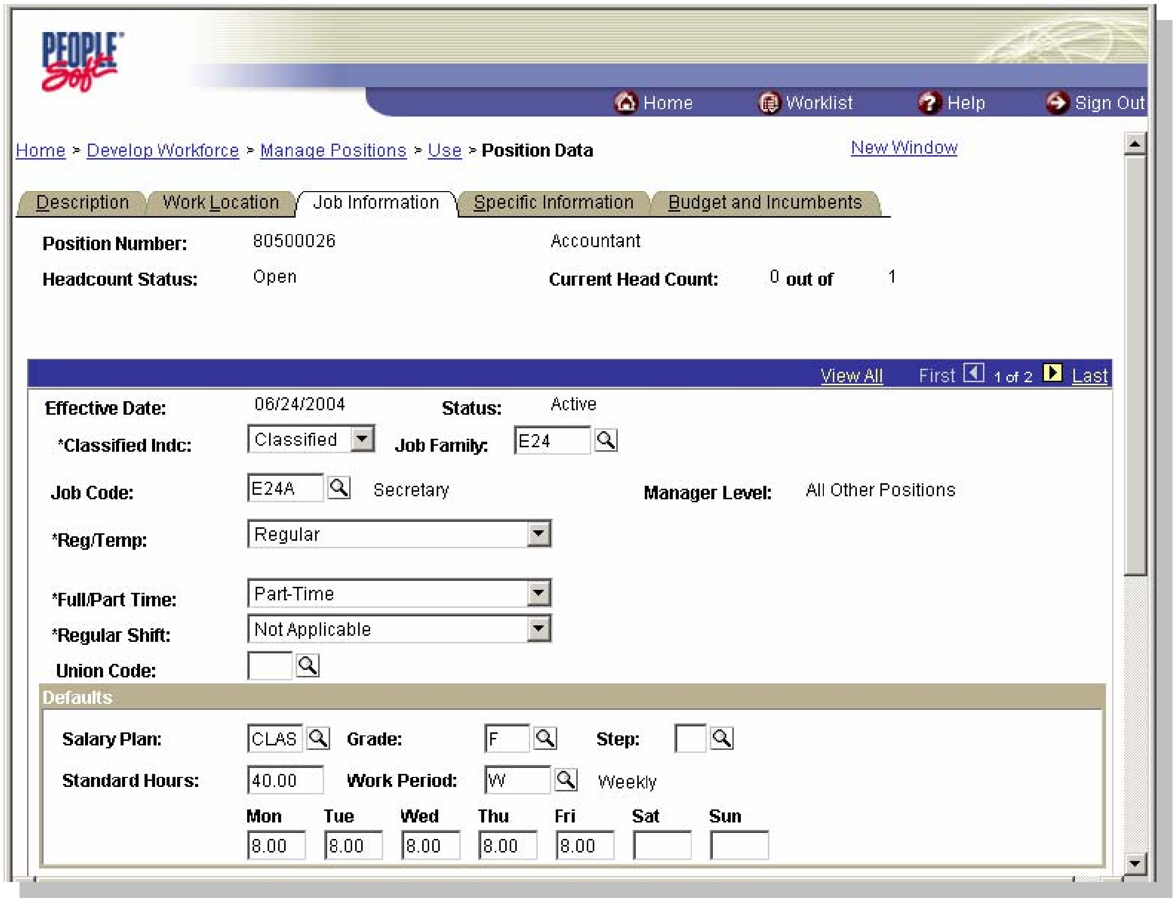
Select the **'Insert Row'** + button.

Effective Date – Verify today's date, or change if necessary.

Reason – Select 'ALC' – Allocation

Click the **'Job Information'** tab.

POSITION DATA - JOB INFORMATION



CLASSIFIED POSITION

Classified Indicator – May be updated only by OPM.

Job Family – This field shows the Job Family to which a classified position has been allocated and may be updated, after completion of a job audit, only by OPM or an agency with delegation authority to allocate positions.

Job Code – At the time an update is made to the Job Family, this field will automatically default to Level I of the Job Family. A level change may then be made if appropriate.

UNCLASSIFIED POSITION

Unclassified positions will be updated for merit system agencies only by OPM, upon receipt of required information from an agency, and verification of the unclassified authorization and FTE limits. Non-merit agencies will make allocations on their positions since verification of a non-merit unclassified authorization is not required.

Job Code – Insert the new Job Code. The value must be all numeric characters. If the Job Code is not all numeric, an error message will be displayed stating that this is an Invalid Job Code and you will not be allowed to continue.

SetID and Unclassified Cite Code – Enter the cite code describing the authority for the unclassified position. Use the Lookup if needed. The cite code for non-merit agencies is normally NM but another code may be required in some cases, such as I001 for Carl Albert Undergraduate interns, I002 for Carl Albert Executive Fellows, or T008 for temporary positions.

Click  to save the updates.

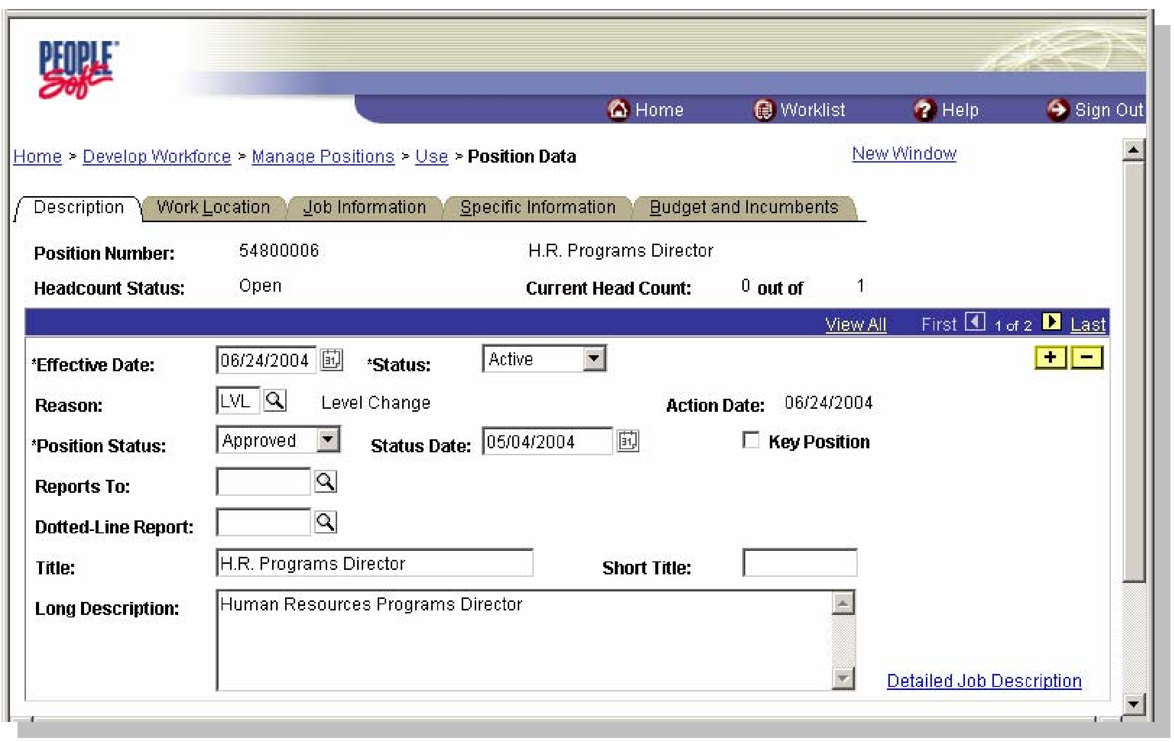
UPDATE A JOB CODE / LEVEL

An update to a classified Job Code may be required when a new position is established, after completion of a position audit, or as a result of a level review by an agency. For a classified position, the job code is used to show the level to which the agency has assigned the position. The first 3 digits must match the Job Family. The fourth digit will normally be assigned by the agency, but may be assigned by OPM as a result of an appeal by the employee during a classification grievance. Unclassified Job Codes will be updated by OPM for merit system agencies upon receipt of a request from an agency. Non-merit agencies will update the job code on their positions as needed.

Find the correct position by searching for the Position Number as directed in “Updating Position Data”.

Only the **Description** and **Job Information** pages are needed to update a job code. However, other updates, such as department or location, may be made if needed.

POSITION DATA - DESCRIPTION



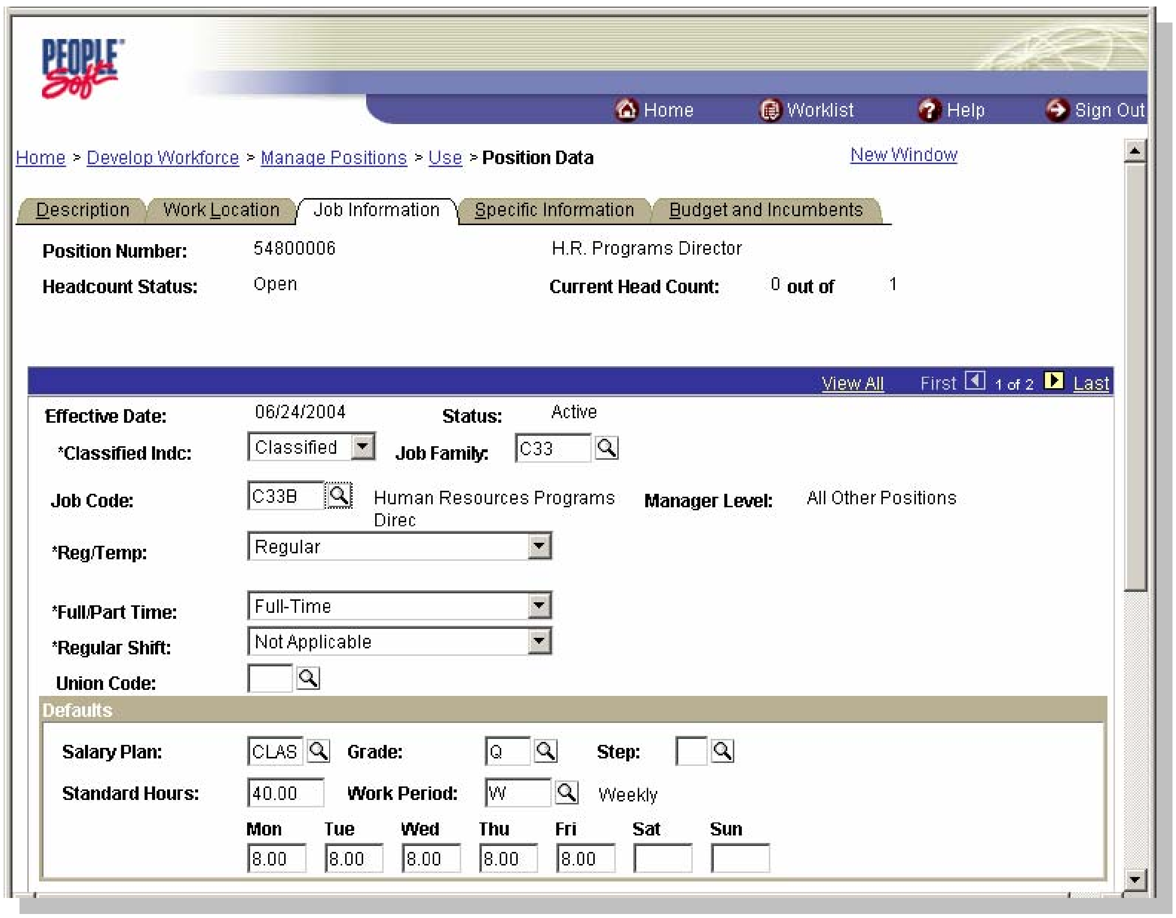
Select the **‘Insert Row’** **+** button.

Effective Date – Verify today's date, or change if necessary. This may be the same date a Job Family allocation was made, but cannot be earlier.

Reason – Select 'LVL' - Level Change.

Click the **'Job Information'** tab.

POSITION DATA - JOB INFORMATION



Classified Indicator and Job Family – These fields will be will be grayed out and cannot be updated by the agency.

Job Code – Insert the new 4 character Job Code. The first 3 characters of the Job Code must match the 3 character code in Job Family. If they do not, an error message will be displayed stating that this is an Invalid Job Code and you will not be allowed to continue.

Click 

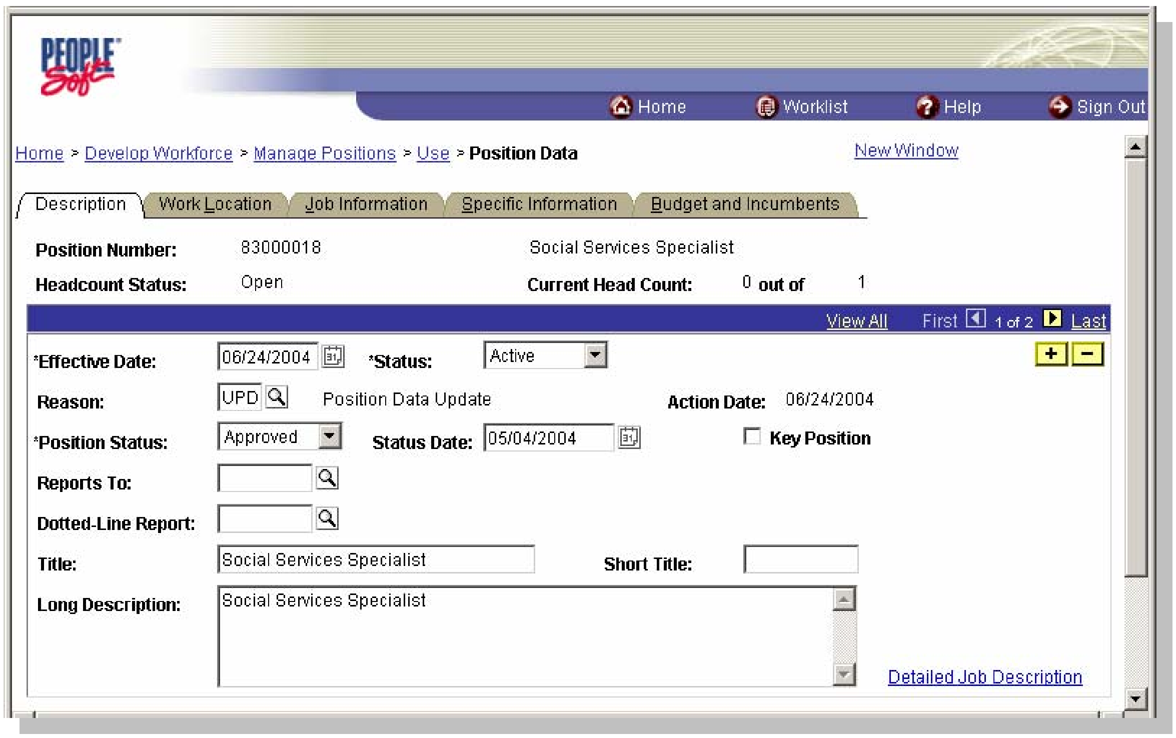
to save the updates.

UPDATE A DEPARTMENT OR LOCATION

Find the correct position by searching for the Position Number as directed in “Updating Position Data”.

To update a Department number or Location, use the **Description** and **Work Location** pages.

POSITION DATA - DESCRIPTION



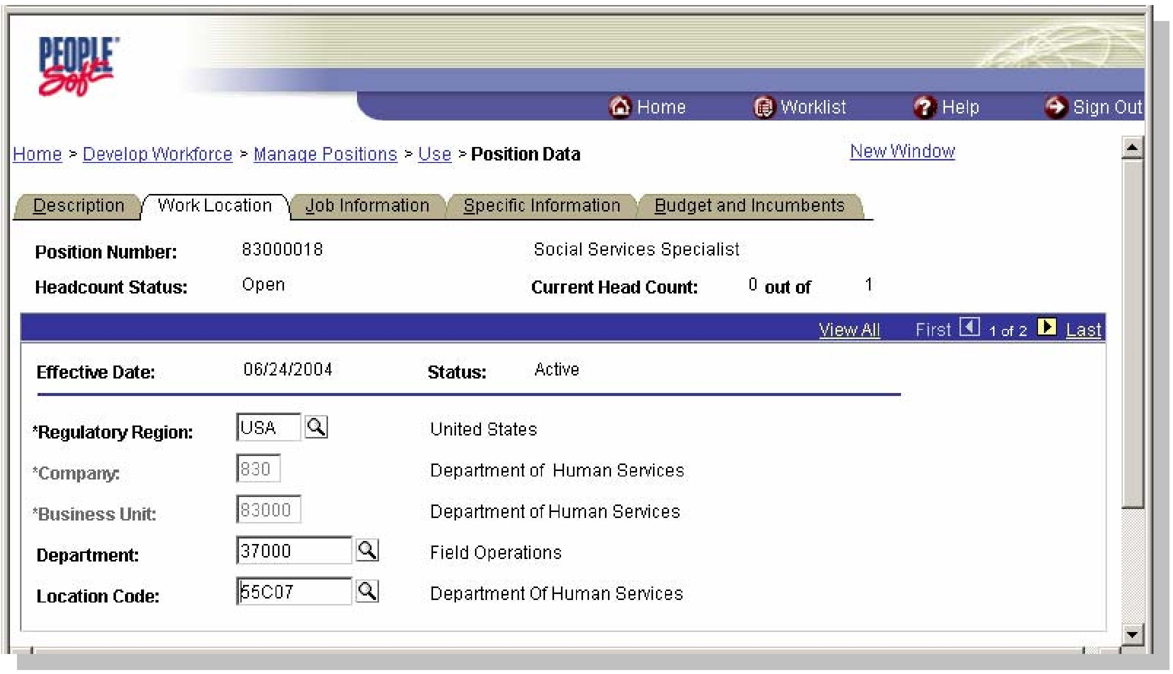
Select the **‘Insert Row’** button.

Effective Date – Verify today’s date or change if necessary.

Reason – Select ‘UPD’ – Position Data Update

Click the **‘Work Location’** tab.

POSITION DATA – WORK LOCATION



DEPARTMENT UPDATE

Department – Select the new department from the Lookup.

LOCATION UPDATE

Location – Select a new location from the Lookup.

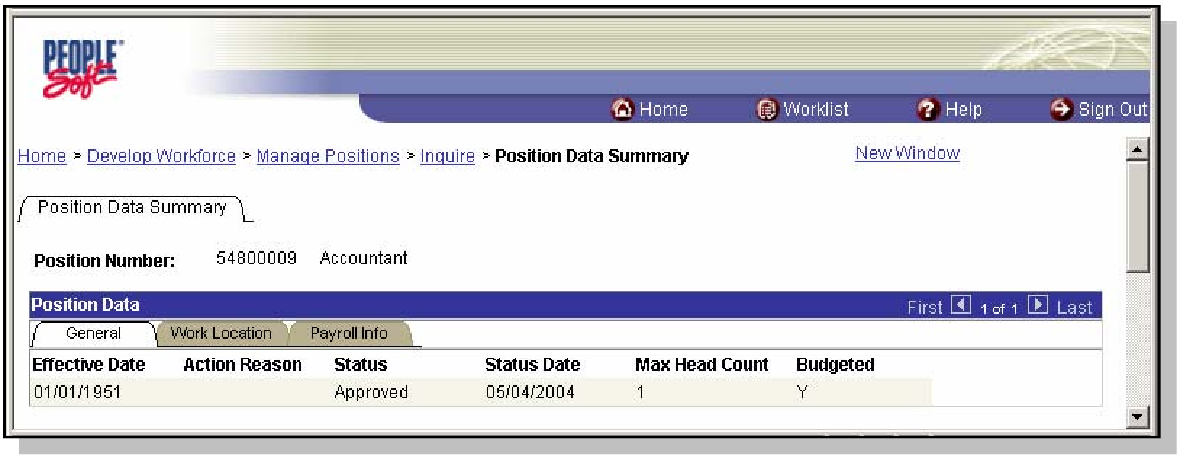
Click Save to save the updates.

NOTE: Company and Business Unit will be grayed out. These fields are not available to be updated.

POSITION DATA SUMMARY

To see a high-level summary of a position, use Position Data Summary. These display-only pages contain historical information on positions and incumbents.

Navigation: *Develop Workforce > Manage Positions > Inquire > Position Data Summary*



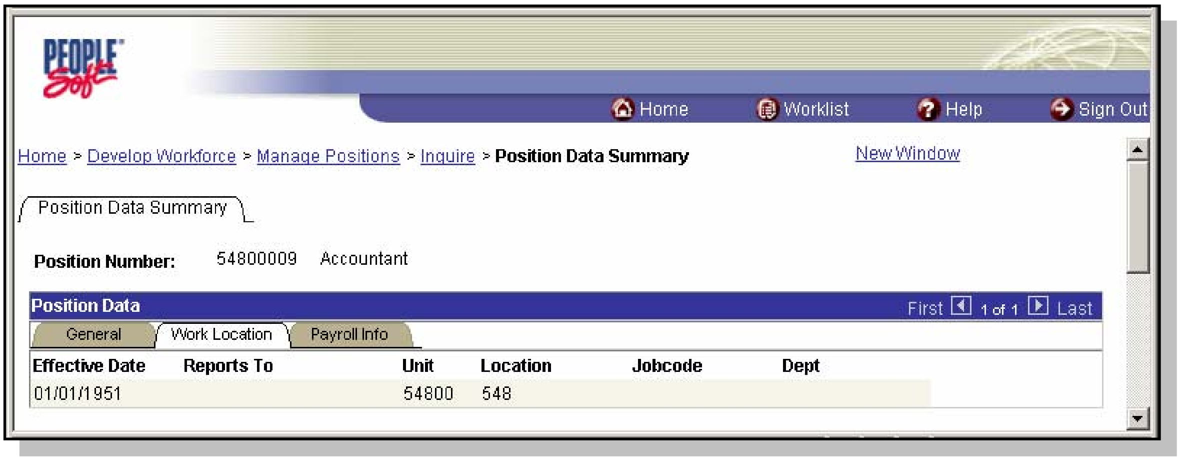
GENERAL

The General tab lists the **Effective Date, Action Reason, Status, Status Date, Max Head Count,** and **Budgeted** indicator.

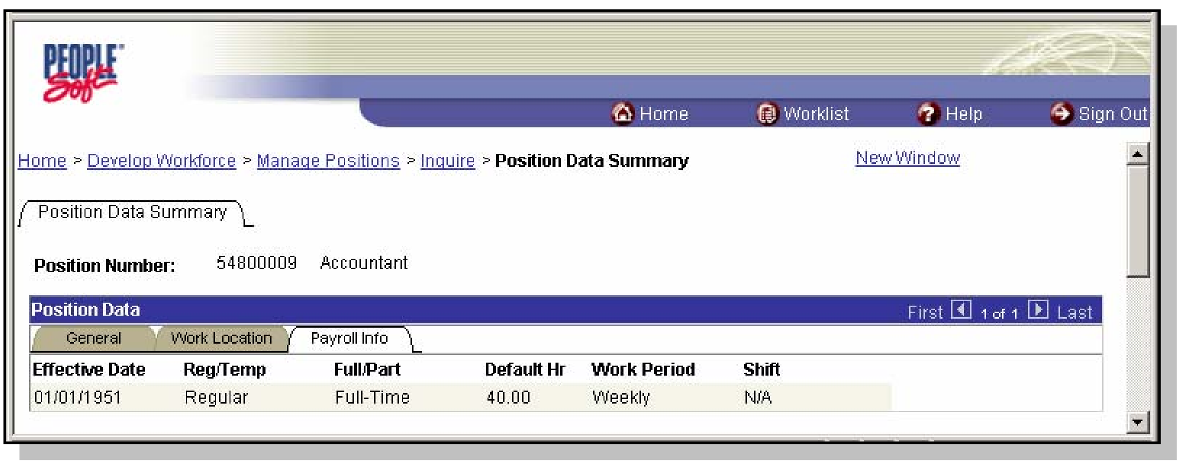
View additional data by selecting the **'Work Location'** and **'Payroll Info'** tabs.

WORK LOCATION

The Work Location tab lists the **Business Unit, Location** and **Department**.



PAYROLL INFO



The Payroll Info tab lists **Reg/Temp, Full/Part time, Default Hours, Work Period** and **Shift.**

Click Return to Search to view another position.

POSITION HISTORY

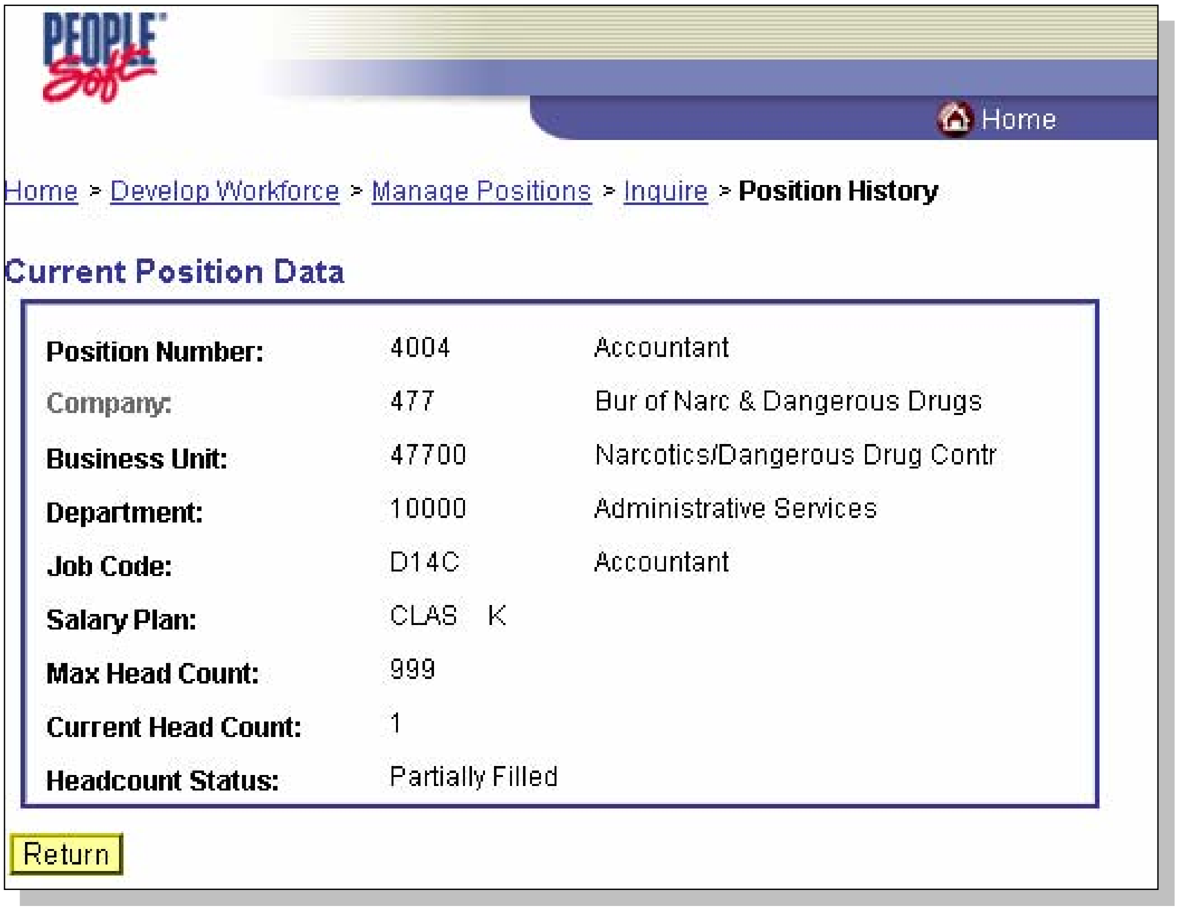
Position History is used to view incumbent salary information. This information can be used to anticipate approximate salary for a new position, examine exit reasons, and explore ways to reduce turnover in a position.

Navigation: *Develop Workforce > Manage Positions > Inquire > Position History*

Position History displays the **Position Entry Date, Position End Date, Compensation Rate, Salary Plan,** and **Grade.**

Components – This link can be used to view the salary either at the **Position Entry Date** or **Position End Date** associated with the employee's position.

Current Position Data – This link can be used to access the Current Position Data page.



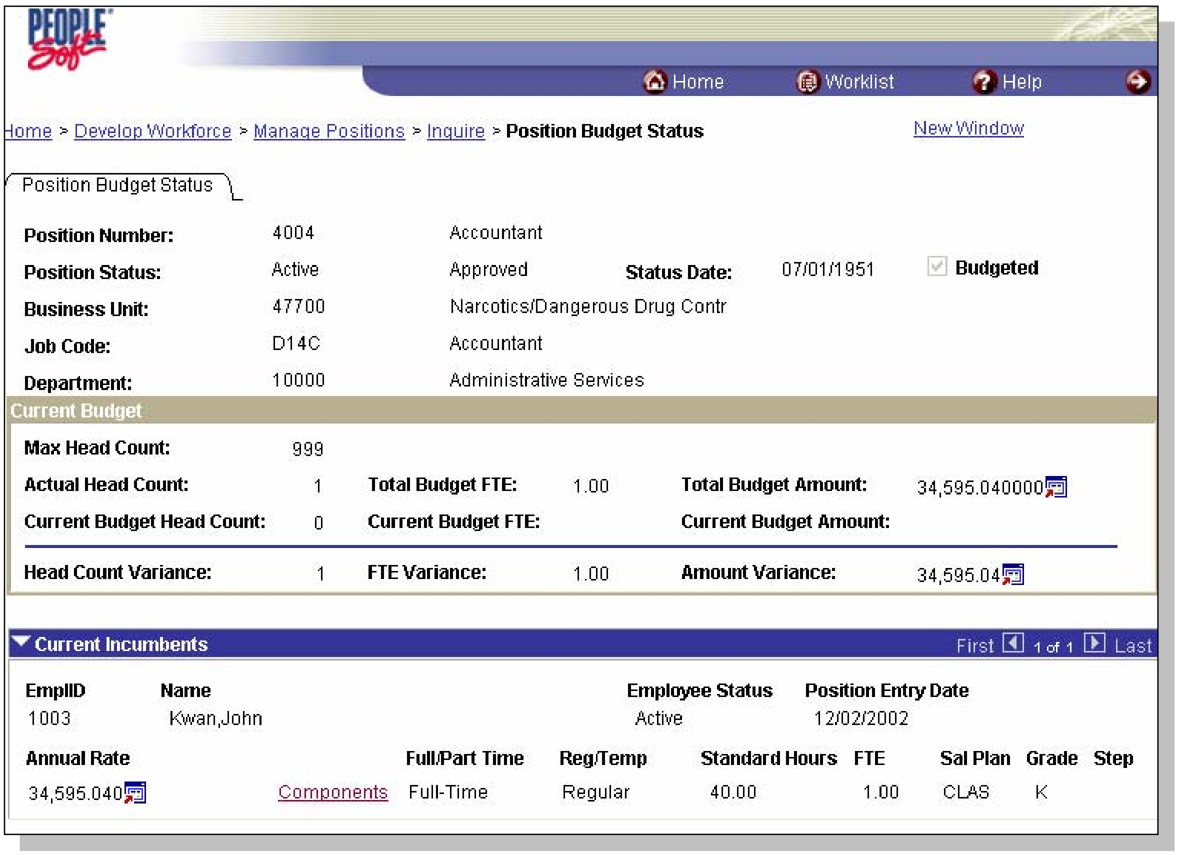
Click Return to go back to Position History.

Click Return to Search to view another position.

POSITION BUDGET STATUS

Position Budget Status shows a condensed view of the position information. The State of Oklahoma will be developing additional functionality to accommodate position budget information.

Navigation: *Develop Workforce > Manage Positions > Inquire > Position Budget Status*



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CURRENT INCUMBENTS

Displays information on the current incumbent(s).

Information includes: **EmplId, Name, Employee Status, Position Entry Date, Annual Rate, Full/Part Time, Reg/Temp, Standard Hours, FTE,** and **Salary Plan and Grade.**

The Components link accesses the Salary Components Page.

COMPONENTS

Compensation Rate and Frequency – These fields are displayed on the Amounts and Changes tabs.

Amounts:

Information includes: **Rate Code, Sequence, Details, Compensation Rate,** and **Frequency.**

Changes:

Information includes: **Change Amount** and **Change Percent.**

Click OK to get back to the Position Budget Status page.

Click Return to Search to view another position.

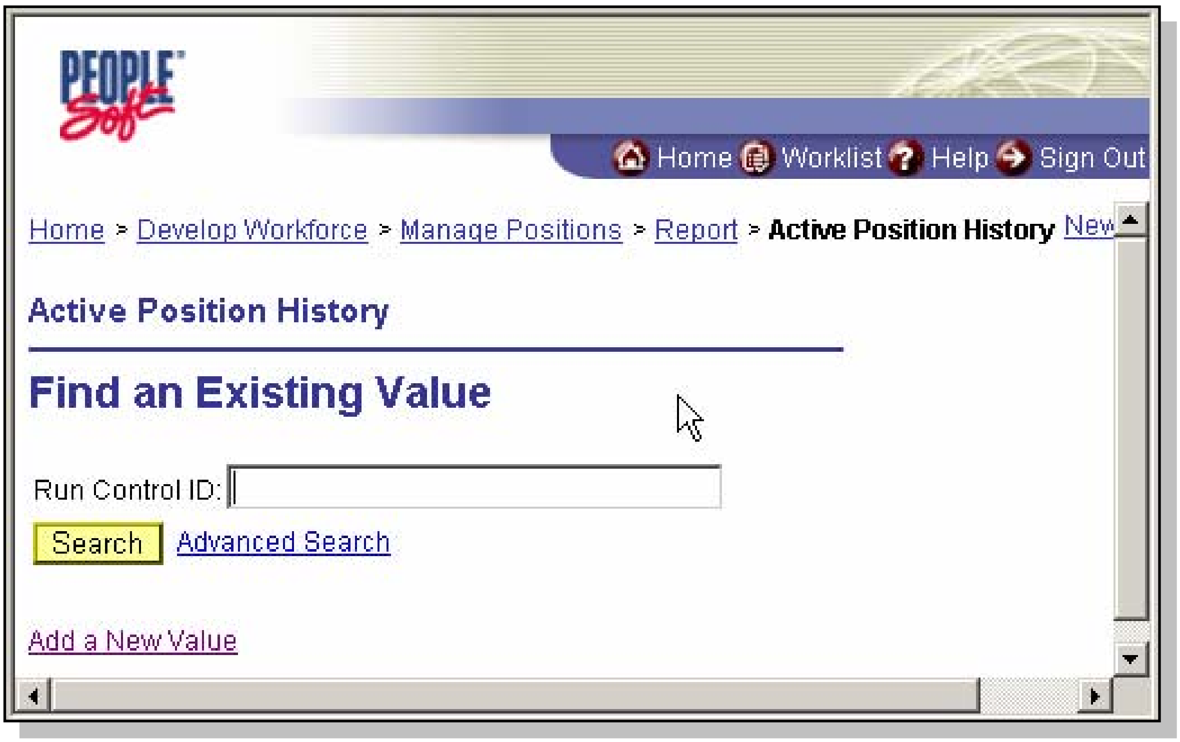
Run a Report

Select a Report

To run a report, select it from the appropriate menu in your PeopleSoft application.

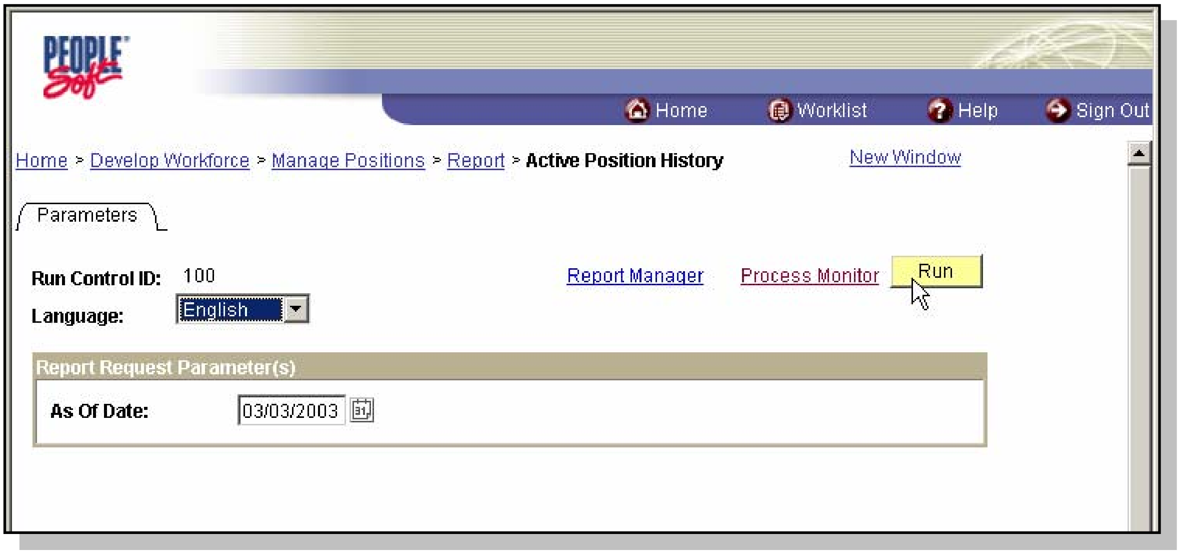
Navigation: *Develop Workforce > Manage Positions > Report > Active Position History*

Run Controls

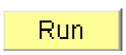


Run Control ID – Click on Search and select a 'Run Control ID'.

A **Run Control** is a database record that provides values for these settings. Instead of entering the same values each time you run a report, you create (and save) a run control with those settings. The next time you run the report, you select the run control, and the system fills in the settings.



As of Date – Type in the 'as of date' for your report.

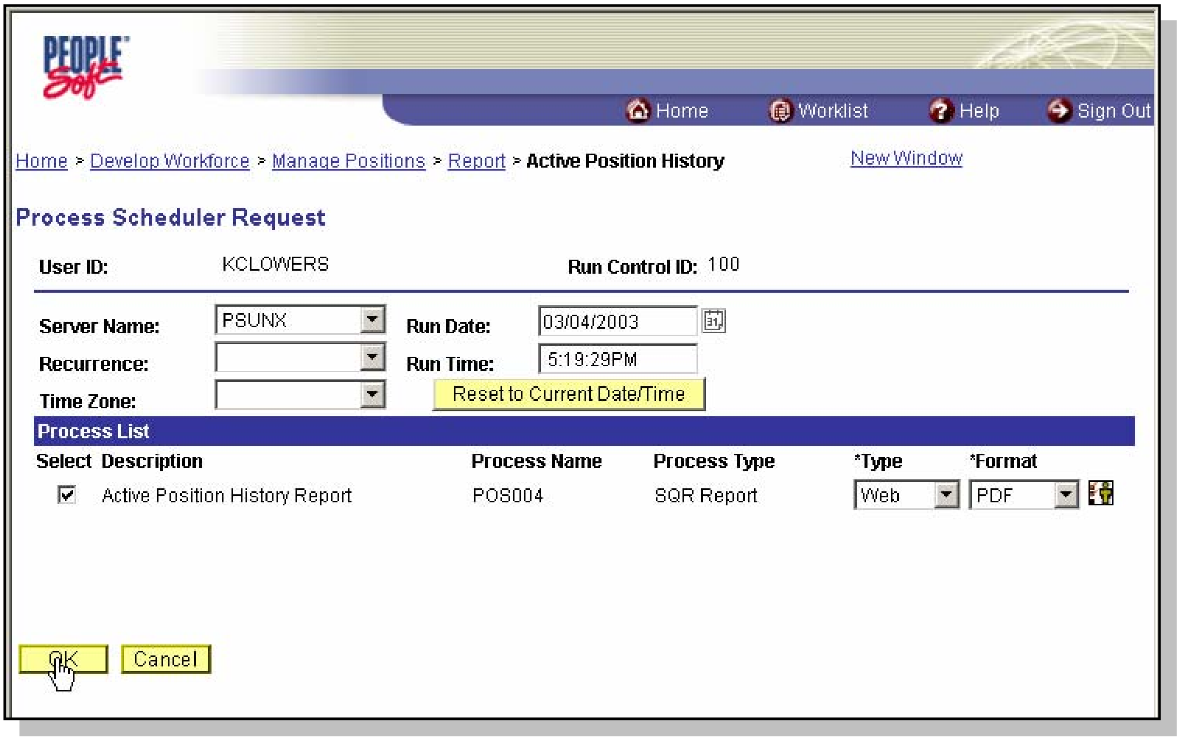
Click on the 

button.

Specifying When and Where To Run Reports

Submit a process request from the Process Scheduler Request page in your browser. This page shows you the options that you have selected for a particular process request and what processes are available to submit.

After clicking the 'Run' button the following 'Process Scheduler Request' page will be displayed.



The options available on this page are determined by your security profile.

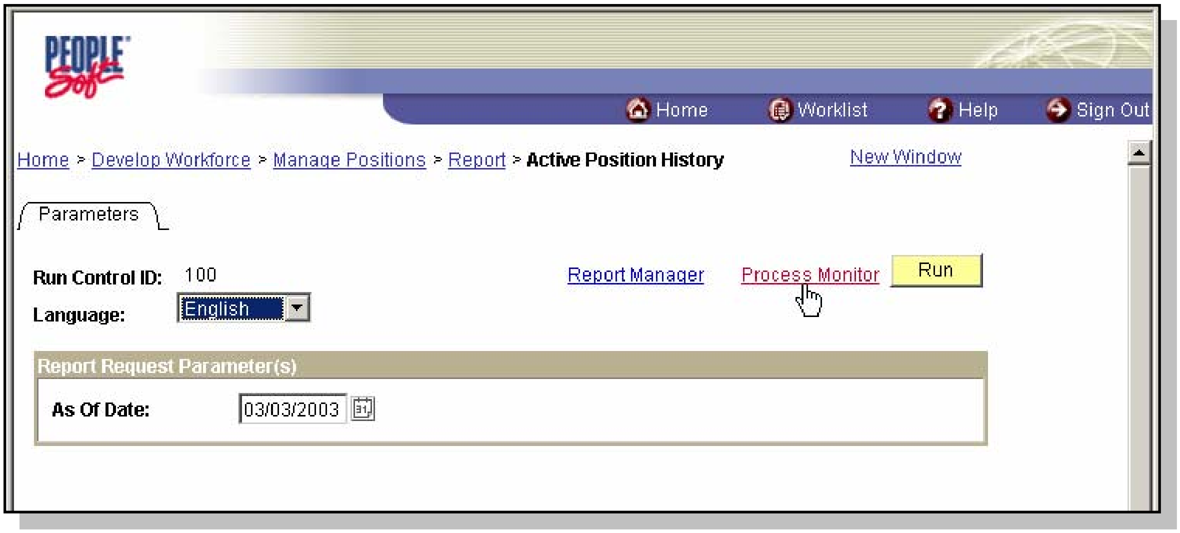
Select the run options that you want to use in running your process. Depending on your security, you can select the server, and run date and time variables for your process. Next, select the checkbox in the Process List for each process that you want to run.

NOTE: All reports at the State of Oklahoma are run on the PSUNX server. The only exception is for Crystal reports. Crystal reports are run on the PSNT server.

PeopleSoft gives you the option to create new output types (including email and Web) and to create distribution lists for Web viewing. The most commonly used output type is .pdf.

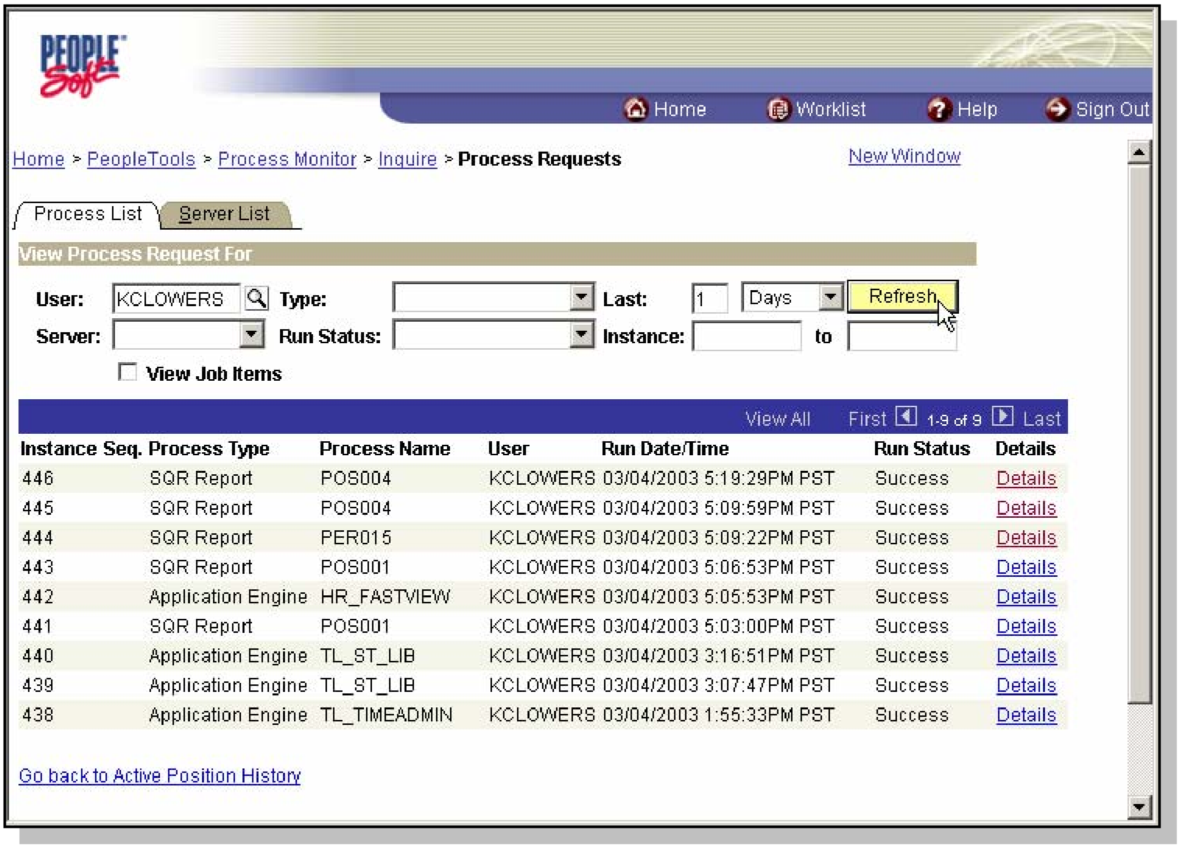
Monitoring a Process Request

Click OK from the Process Scheduler Request page, to return to the process 'Parameters' page. To check the status of your report, select the link Process Monitor to continue.



When running a report from a PeopleSoft application, the system automatically starts the 'Process Monitor'. The Process Monitor is a tool designed to track the status of all completed and pending Process Scheduler requests.

Depending on how much data you ask the system to retrieve, and depending on the system's current processing load, your report might take only a few moments or considerably longer to run.



Click ‘Refresh’ to update this page with the latest system activity. If the ‘Run Status’ column displays ‘Initiated’ or ‘Processing’, the report is still running. When it displays ‘Success’, the system has finished running the report.

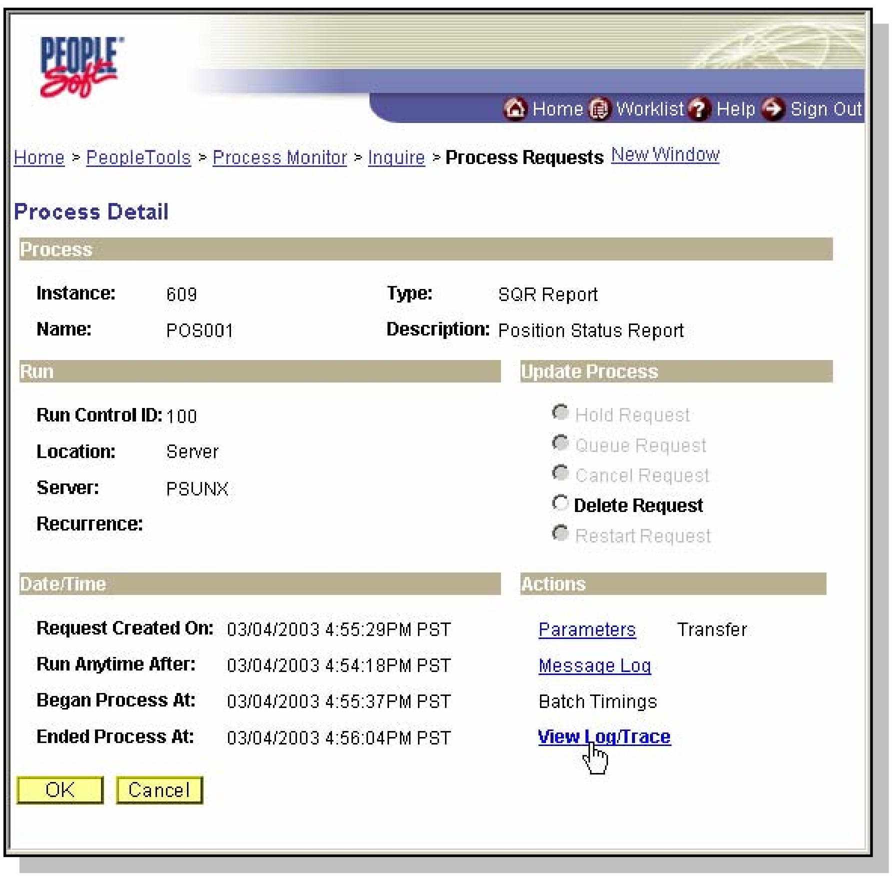
VIEWING REPORTS

To view your report output, select Details and the 'Process Detail' page will be displayed in another browser window.

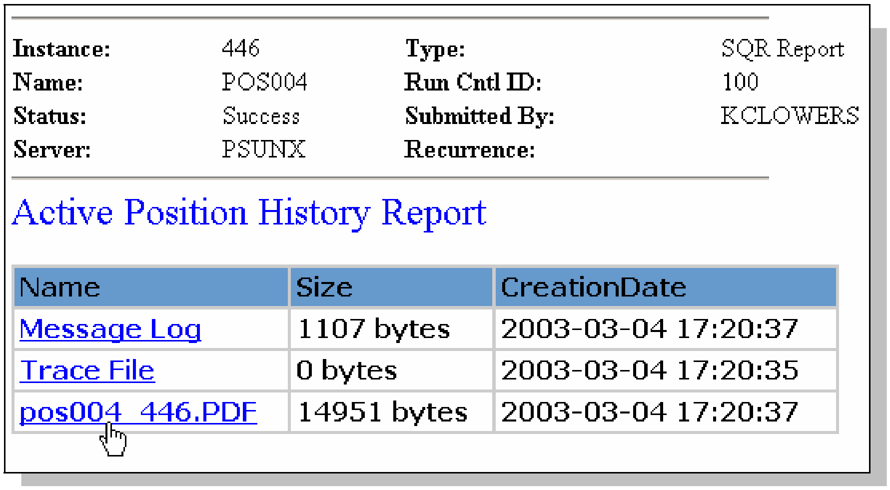
Instance Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Details
446	SQR Report	POS004	KCLOWERS	03/04/2003 5:19:29PM PST	Success	Details
445	SQR Report	POS004	KCLOWERS	03/04/2003 5:09:59PM PST	Success	Details

PROCESS DETAIL PAGE

Click the View Log/Trace link to view report, as shown below.

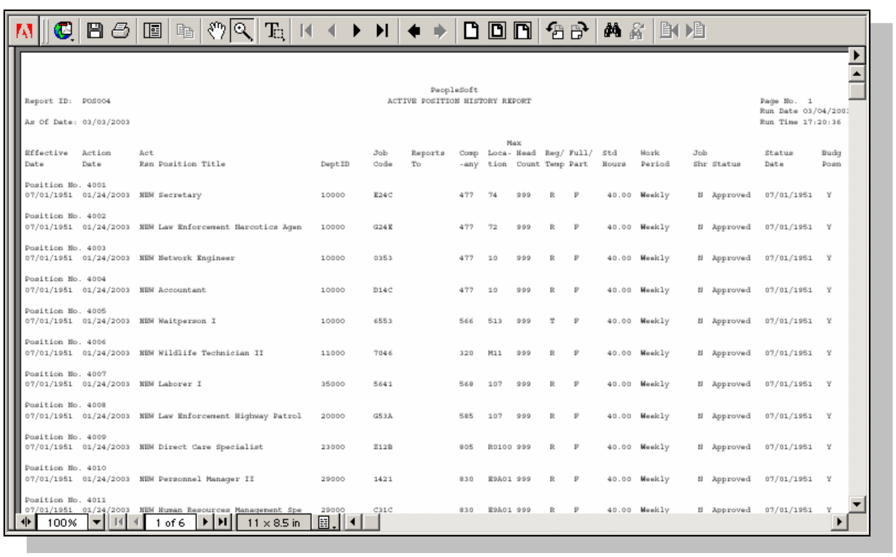


The ‘Report Log Viewer’ will automatically open.



Click the link to the report, or the associated file, that you want to view. Example: pos004_446.pdf.

Once you click on the report link the file will automatically open in your browser. You can view and/or print from the open window. Close the window after viewing or printing.



The system will return to the active window.

Select the link Go back to Active Position History to return to the original selection window.