UNIVERSITY OF CALIFORNIA UCPath

Workforce Administration

PHCMWFAL300:
Position Control

Introductions

Instructor

- Name
- UC role
- UCPath role
- Years at UC
- Functional experience

Attendees

- Name
- University role
- Years at UC
- Expectations for this training

Training Logistics

Safety and Housekeeping

- Emergency evacuation procedures
- Restrooms
- Course duration: 4 hours
- Breaks

Classroom Etiquette

- Please turn off cell phones
- No email or web surfing
- Return from breaks on time
- Please use trash receptacles in the room

Parking Lot

- Capture any questions or concerns that cannot be addressed during class
- Provide follow up to all attendees of this class

Course Agenda

1: Position Management Overview

2: View Position Summary Data

3: Add New Positions

4: Update Vacant Positions

5: Review Position Control Transactions

Course Objectives

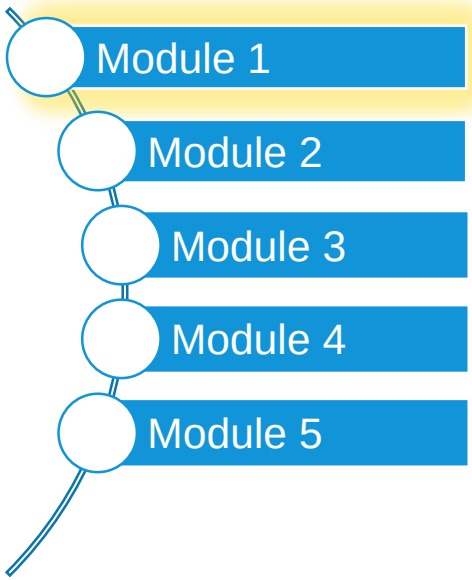
By the end of this course, you should be able to:

- Identify features of the **Position Management** module.
- Explain the relationship between position data and job data.
- View current and historical position summary information.
- Initiate a position control request for a new position.
- Initiate a position control request for updates to a vacant position.
- Access and view existing position control request transactions.

Position Management Overview

Module 1

Module Objectives



The module learning objectives are:

- Describe the **Position Management** module within UCPath.
- List the benefits of using position management.
- Explain the relationship between position data and job data.
- Define position funding and departmental budgets

Position Management Overview

Designed to maintain effective-dated history of all UC positions – filled and vacant.

Benefits of creating and maintaining positions

- Link key data elements and facilitate hiring process.
- Define reporting hierarchy and organizational structure of a department.
- Tie employees to accounting chart fields that determine how labor costs are distributed.
- Use position data for organizational planning, recruitment, career planning and budgeting

How UC Uses Position Management

One-to-One Position

- All existing employees, including student employees, are assigned a position during conversion.
- Most employees are assigned to a single headcount position (one-to-one).
- **Multiple headcount** positions (one-to-many) used only for non-permanently-funded or non-represented positions.
- For employees with multiple jobs, each assignment has a unique position number.
- **Position Pools** are assigned to positions for Work Study funding purposes.
- Only Contingent Workers who supervise others are required to have a position; otherwise they do not have positions.

Job versus Position

- Many employees throughout the various UC Locations share the same title and job code, but each employee has a unique position number.
- A **position** is like an empty box on an org chart. You assign: Business Unit, Job Code (title), Union Code, FLSA Status and more. The person who is assigned the box inherits those attributes and is referred to as the **incumbent**.
- An advantage of using a **position** is that you can define the jobs in the department, even if people are not in them.

Relationship Between Position Data and Job Data

Position Data

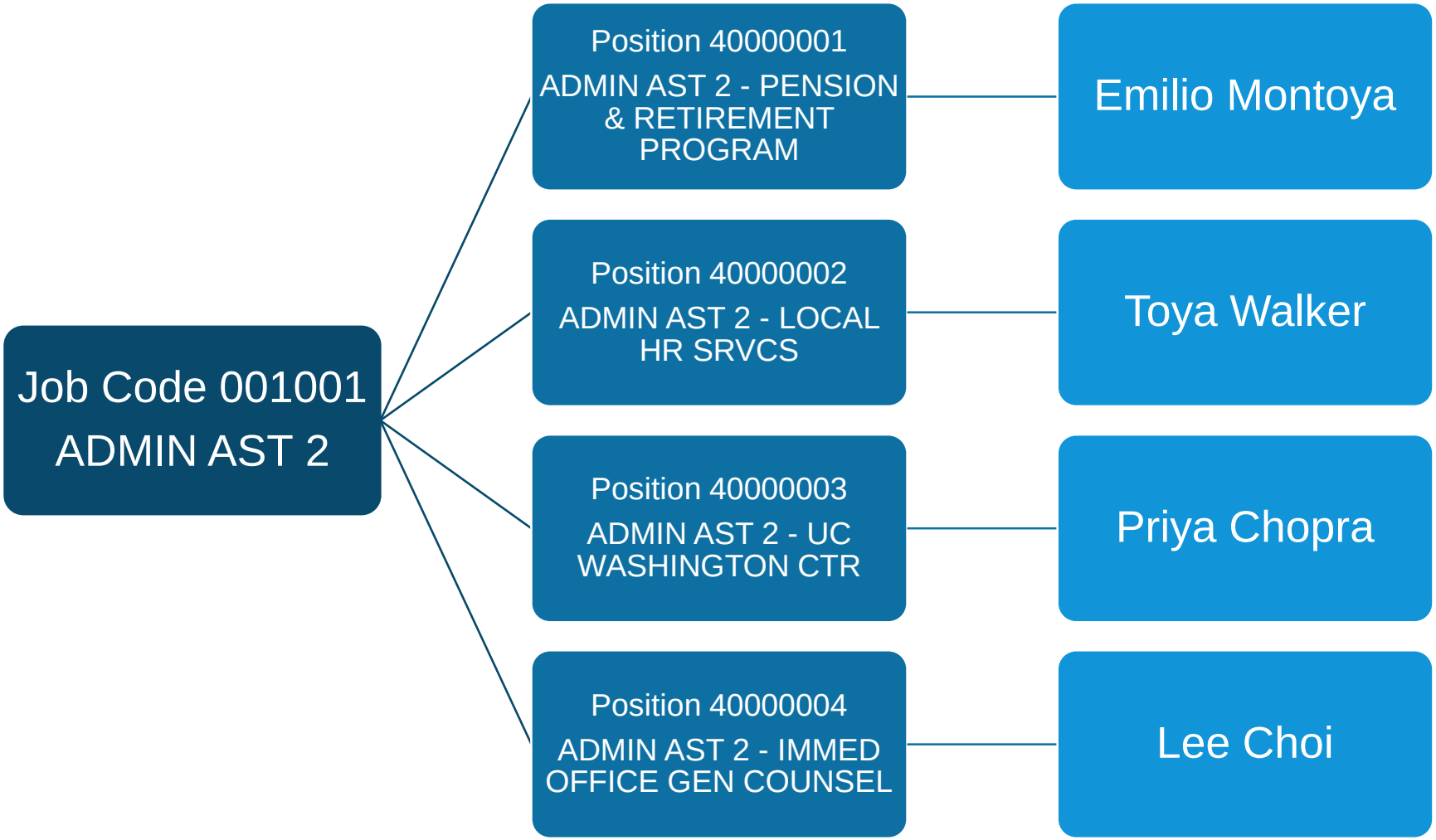
- Establishes key job-related data elements.
- Establishes departmental structure and organizational hierarchy, including Reports To supervisor.
- Maintained whether position is filled or vacant.

Employee Job Data

- Key job-related data default from position data when employee is assigned to a position.
- Some position changes affect employee job data; for some updates, UCPath automatically maintains the current incumbent's job data.

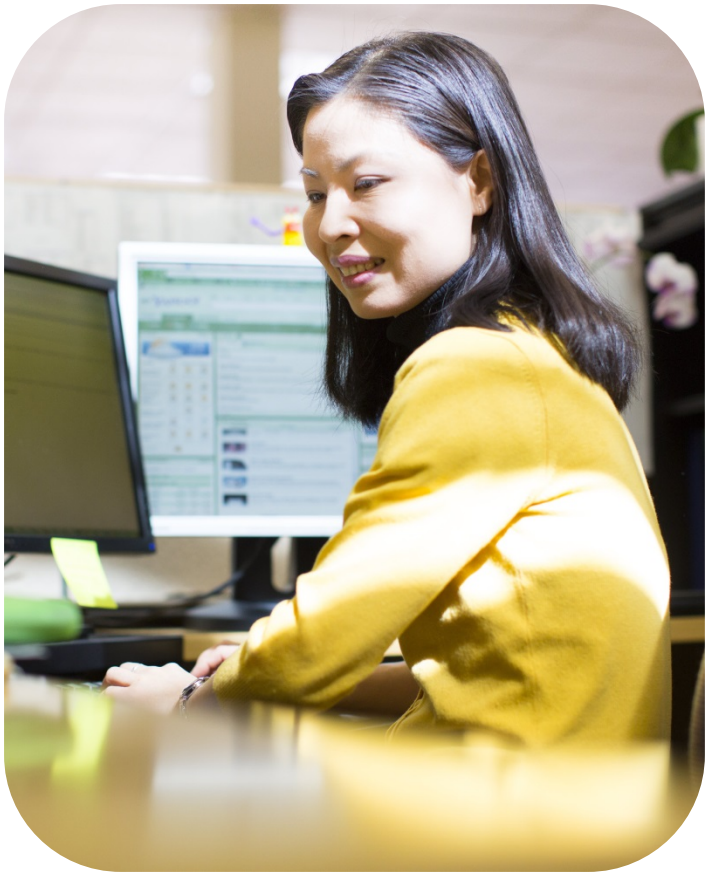
Position actions and job actions can occur independently or simultaneously, depending on the change(s).

Job Codes, Positions and Employees



When to Use Position Data

- Position management activities must begin prior to placing an employee into a position.
- When a position is vacated, it should be evaluated based on the department's overall budget; it can be inactivated or remain open if there are plans to refill it.
- Position updates are due to reclassifications, academic promotions, increases in percent time and so forth.
- Position-only updates can occur for several reasons, such as a change to the UC Employee Relations Code, Mail Drop number and so forth.



How Position Data Works

When an employee is hired, or when there is a promotion or transfer, they are assigned a new position. All position attributes flow to job data; re-entry of data is not required.

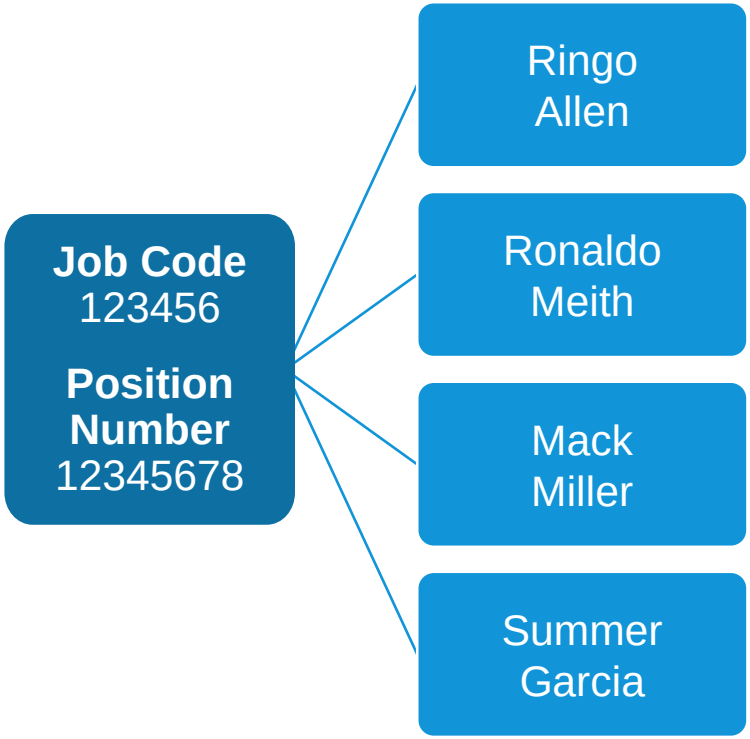
Incumbent history is stored in **Job Data** tables, which allows for the reporting of data.

A position is static until there is a need to maintain it; that is, it is not updated until a change is necessary.

Reclassifications and other position changes begin with an update to the position record. If the effective date is a current or future date, the system automatically updates the incumbent's job data.

Multi-Headcount Positions

- Locations can group jobs with the same attributes into one position rather than creating a unique position for every job.
- One-to-many positions have multiple headcount and/or incumbents.
- Employees must share certain position attributes in order to be assigned to a multi-headcount position.
- Auditing is critical before making any position change when there is more than one incumbent. If not, employee job records could be updated inadvertently with incorrect information.



Position Data and Smart HR Templates

UCR will use Smart HR Templates in UCPath to initiate hire, rehire, data change and retirement/termination transactions.

For most templates, the UCR template Initiator must enter a **Position Number** (required field)

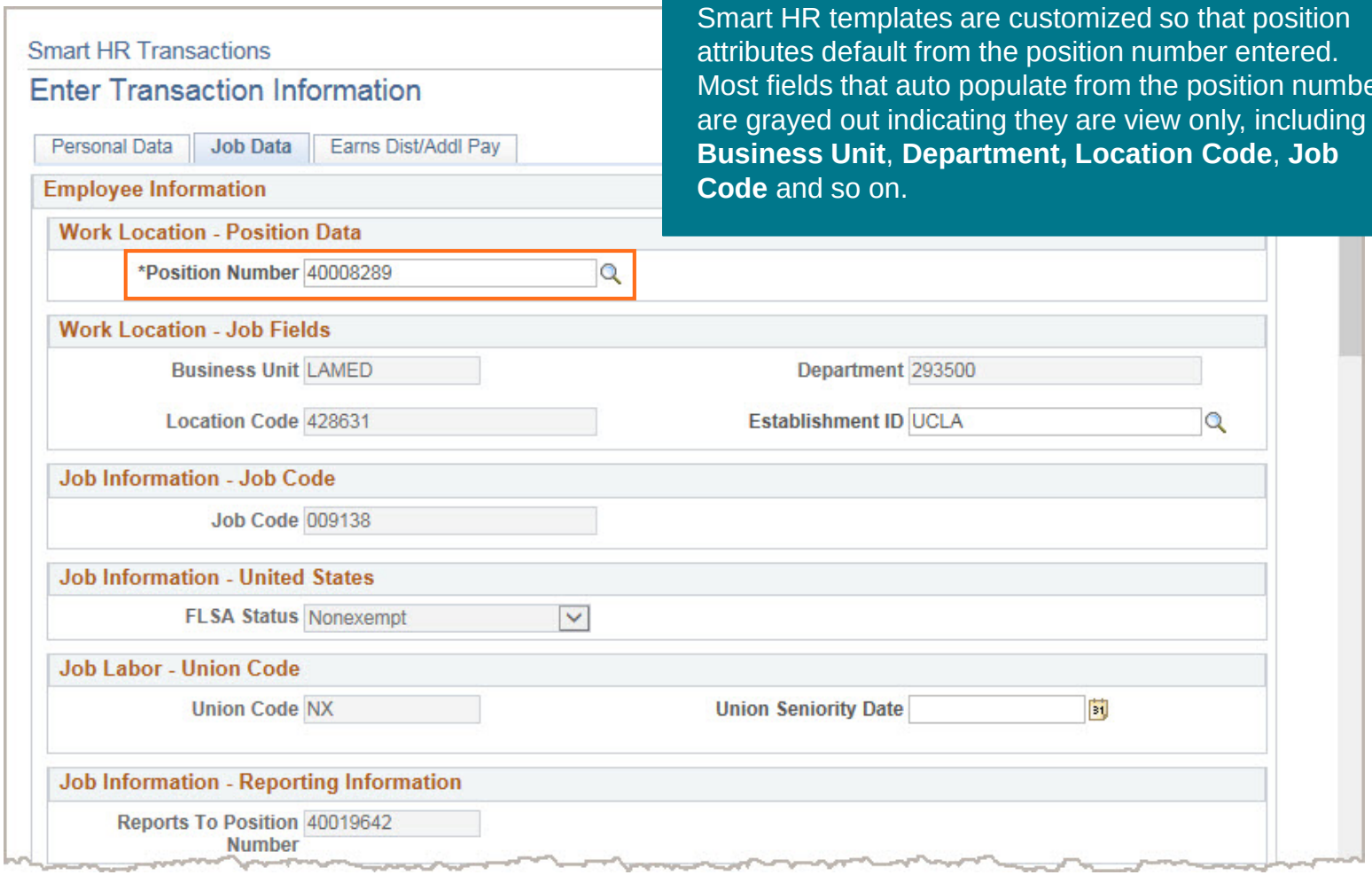
UCPath includes customizations to auto-populate position attributes into the template

After the UCR Initiator submits the template, it is routed for local approval

Upon local approval, the template is processed by WFA Production at UCPC and data are written to **Personal Data**, **Job Data** and **Person Profile** components in UCPath

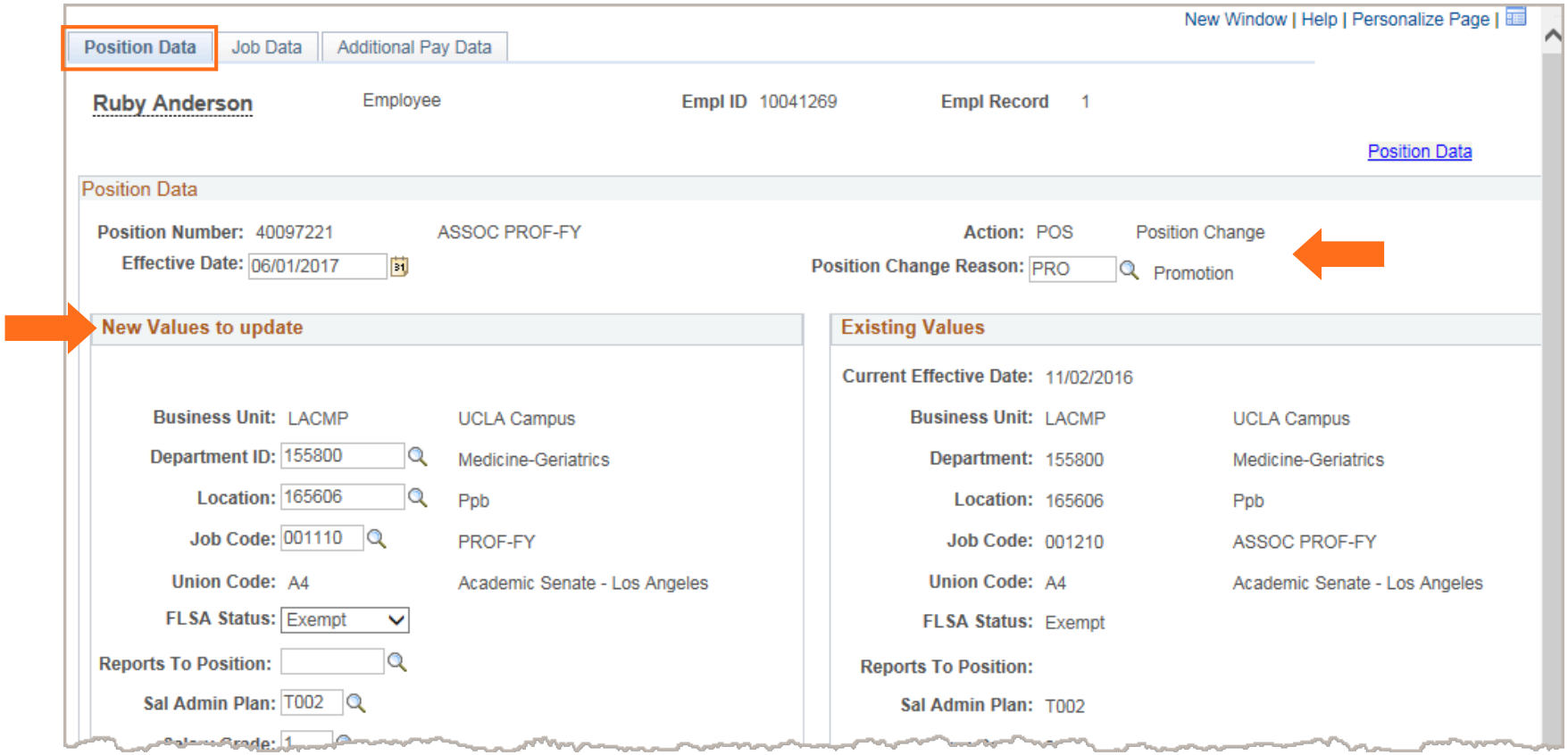
Position Data and Smart HR Templates (cont'd)

Smart HR templates are customized so that position attributes default from the position number entered. Most fields that auto populate from the position number are grayed out indicating they are view only, including **Business Unit**, **Department, Location Code**, **Job Code** and so on.



Position Data and PayPath Transactions

UCR will initiate PayPath transactions for position changes that impact an incumbent employee's job record.



Position Management Roles

Positon Initiator
[SSC Fulfiller]
Enters and submits a **Position Control Request** for approval.
Cannot approve their own transactions.

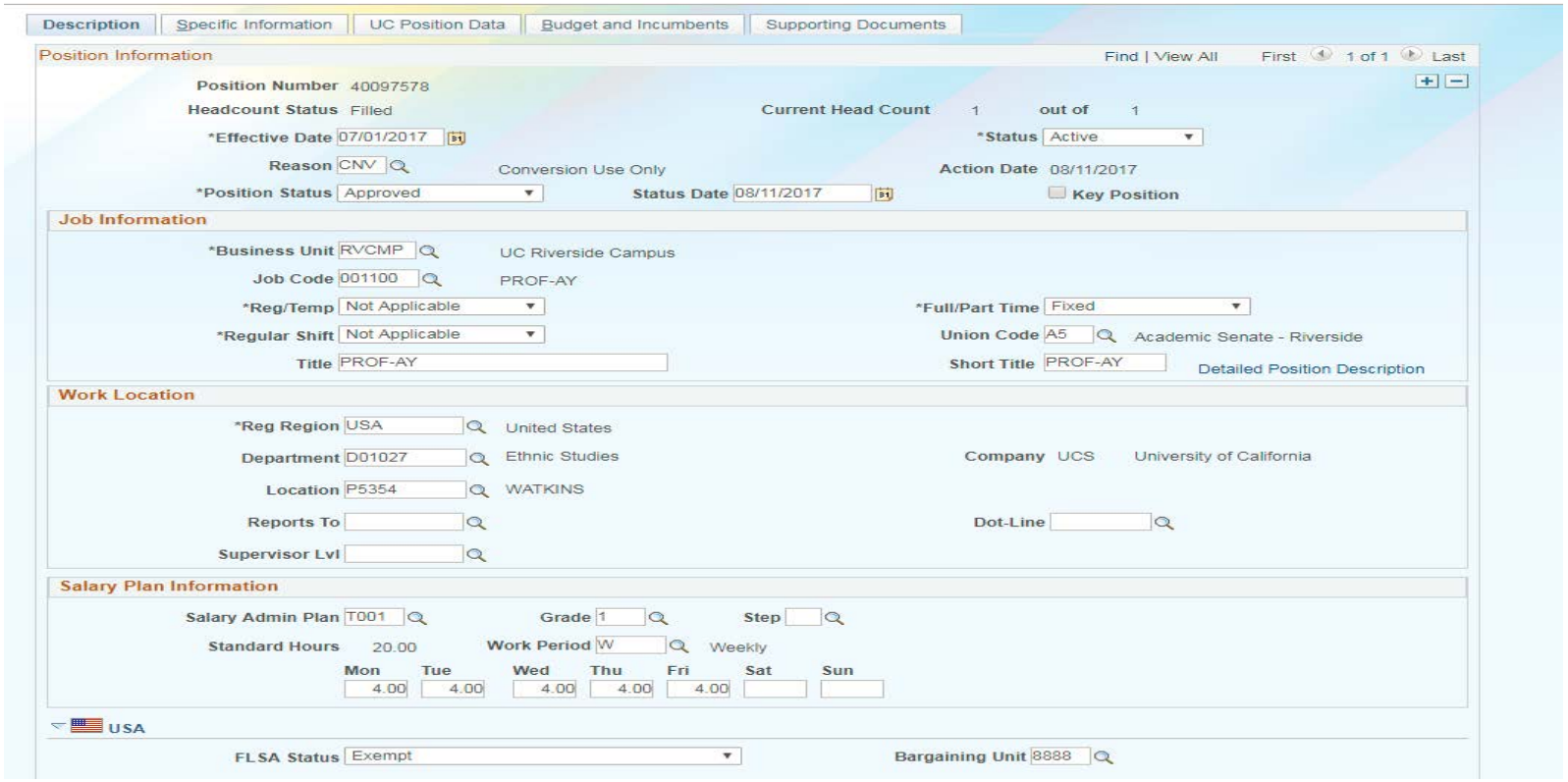
Approver
[AWE Approver]
Reviews and approves **Position Control Requests**.
Adds ad hoc Approver/ad hoc reviewer to AWE workflow when necessary.

Position Administrator

Has access to the **Position Control Request** page and the **Add/Update Position Info** component.

Delivered Position Management (Position Admin's view)

Navigation: PeopleSoft Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info



Position Approvals

- Departments request creation of a new position or updates to existing position, and obtain necessary pre-approvals before system entry.
- For executive positions (SMG) and coaches, Locations cannot create until additional documentation is received, such as Board of Regent's approval.
- Position Control Requests utilize Approval Workflow Engine (AWE) to route requests locally for approvals before writing to UCPath.

Position Funding and Departmental Budgets

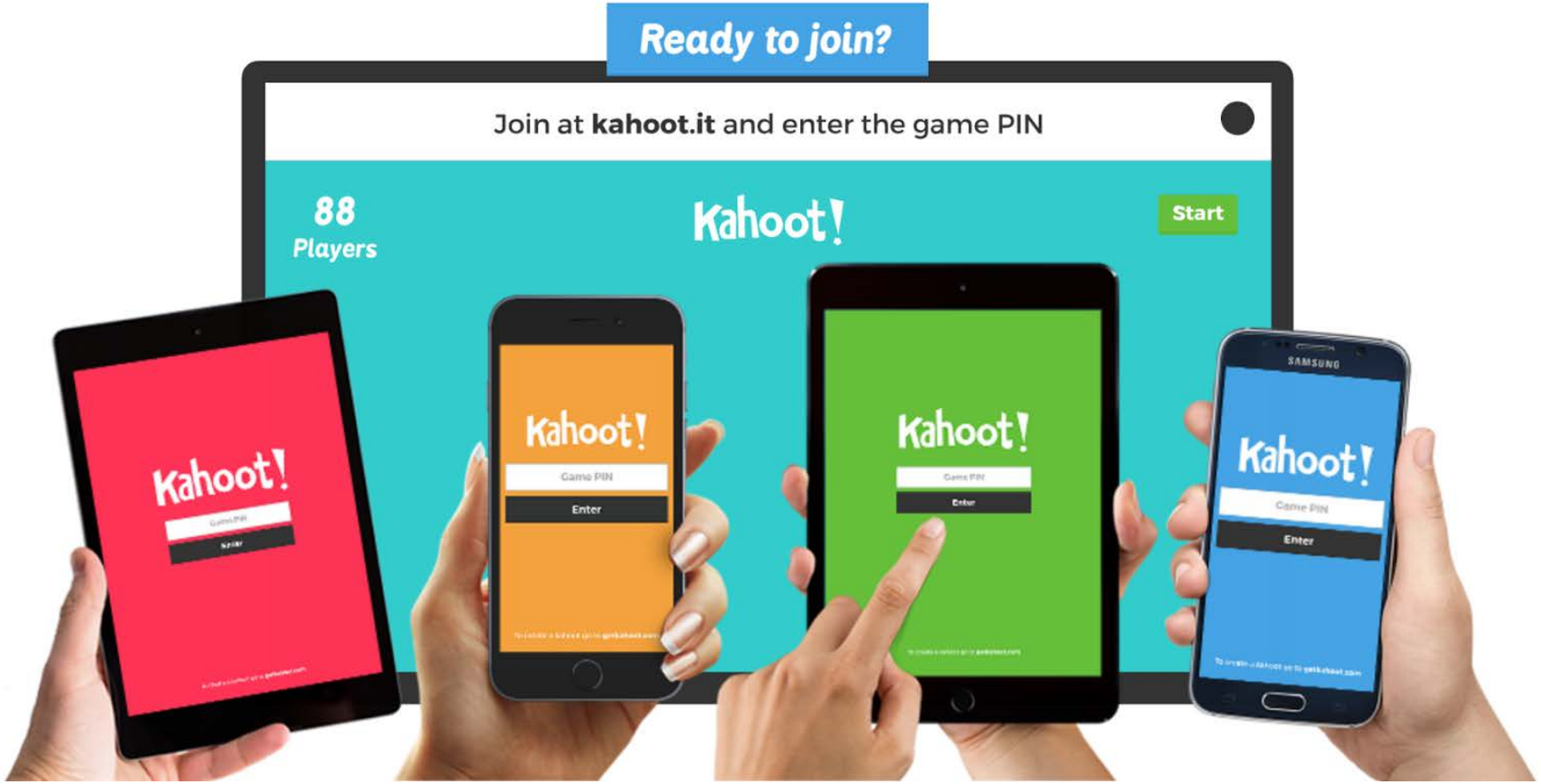
- **Funding** refers to the assignment of the account(s) that pays for a position's compensation.
- **Budgeting** for positions involves departments estimating salary expenditures and comparing estimates with actual expenditures.
- Take position funding and department budgets into consideration when creating a new position or updating an existing position. That is, determine whether the funding or budget also require updates.
- When a position is vacated, it should be evaluated based on the department's overall budget; it can be inactivated or remain open if there are plans to refill it.

Position Funding

Points to Remember

- Position numbers are eight numeric characters and are auto generated by UCPath; there is no smart coding in the number.
- A position is required to hire or rehire an employee.
- Positions can be maintained even when vacant.
- Employees can be assigned to more than one position when they have more than one job.
- Positions are typically assigned to only one employee. Some positions can be multi-headcount positions, but there are many attributes that must be shared.
- Only Contingent Workers who supervise others are required to have a position; otherwise they do not have positions.

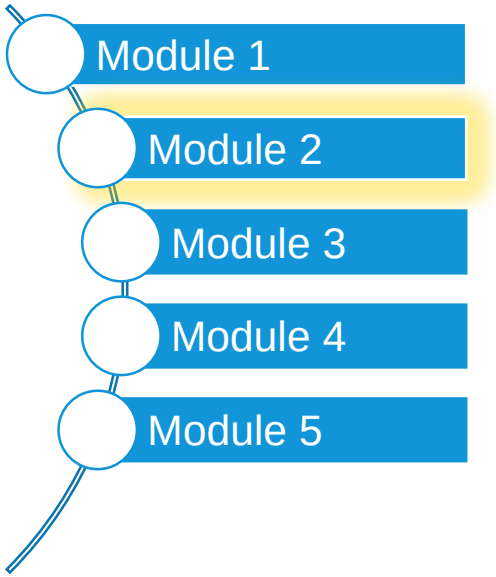
Check Your Understanding



View Position Data

Module 2

Module Objectives

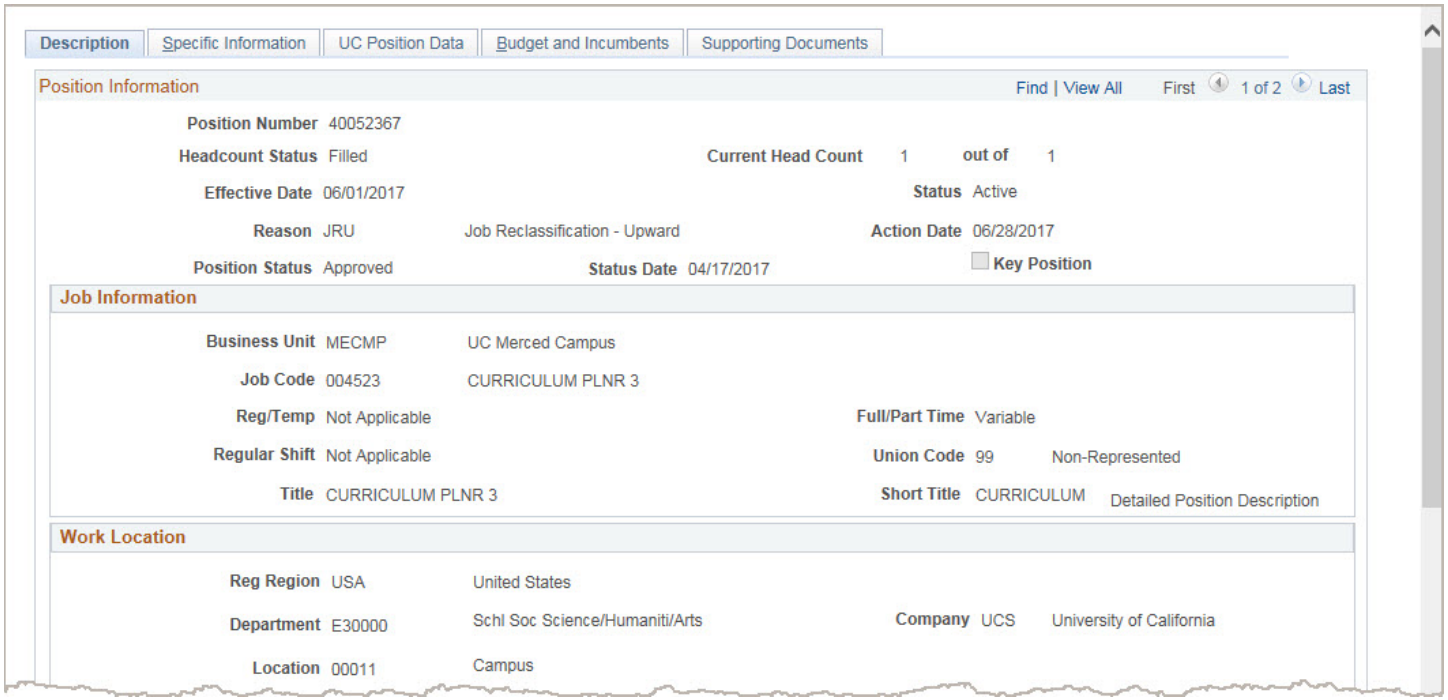


The module learning objectives are:

- List the view-only pages and reports for viewing position summary data.
- View position summary data.

View Position Information – Overview

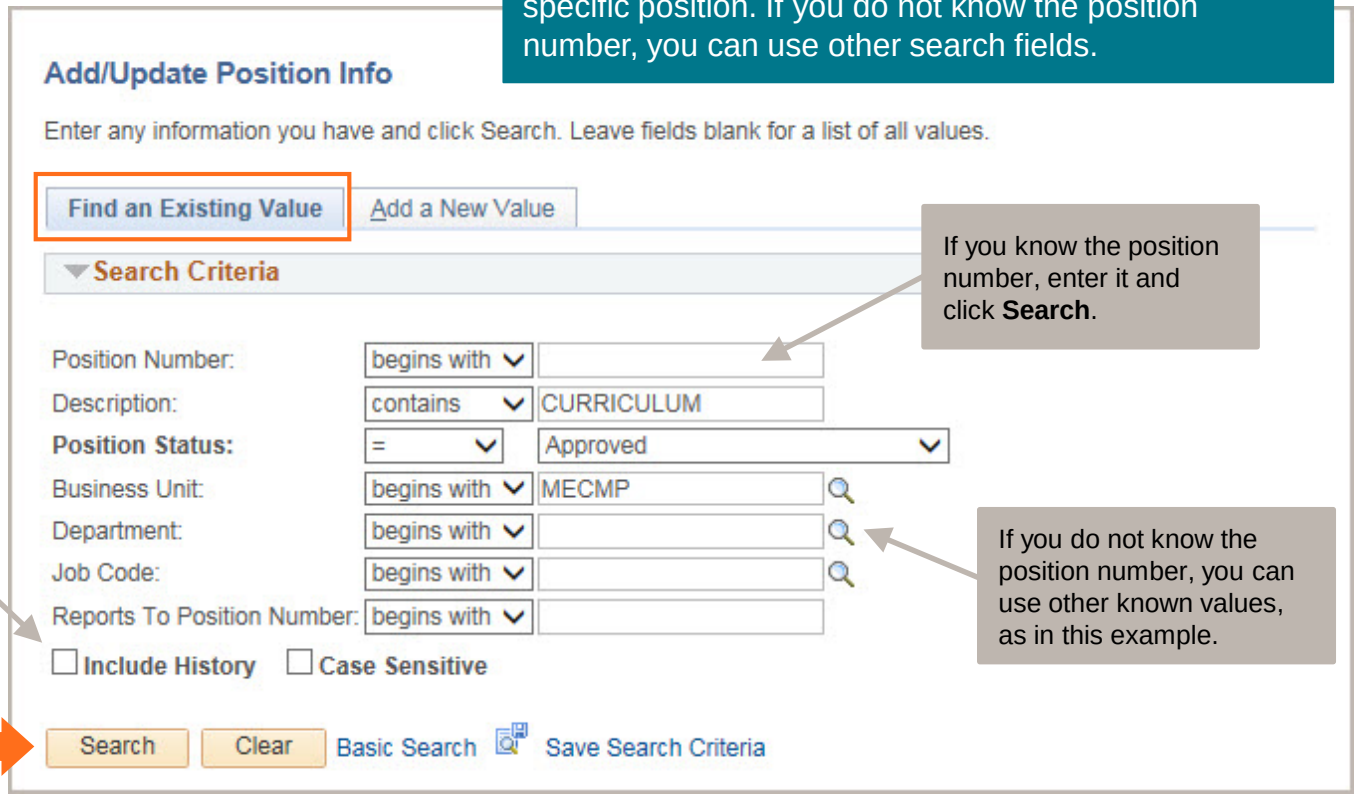
- View position information using various UCPath components/pages.
- Use the **Add/Update Position Info** component to view detailed information for a specific position.



Search for Position

Navigation: PeopleSoft Menu > Organizational Development > Position Management > Maintain Positions/Budgets > **Add/Update Position Info**

Use the **Find an Existing Value** page to search for a specific position. If you do not know the position number, you can use other search fields.



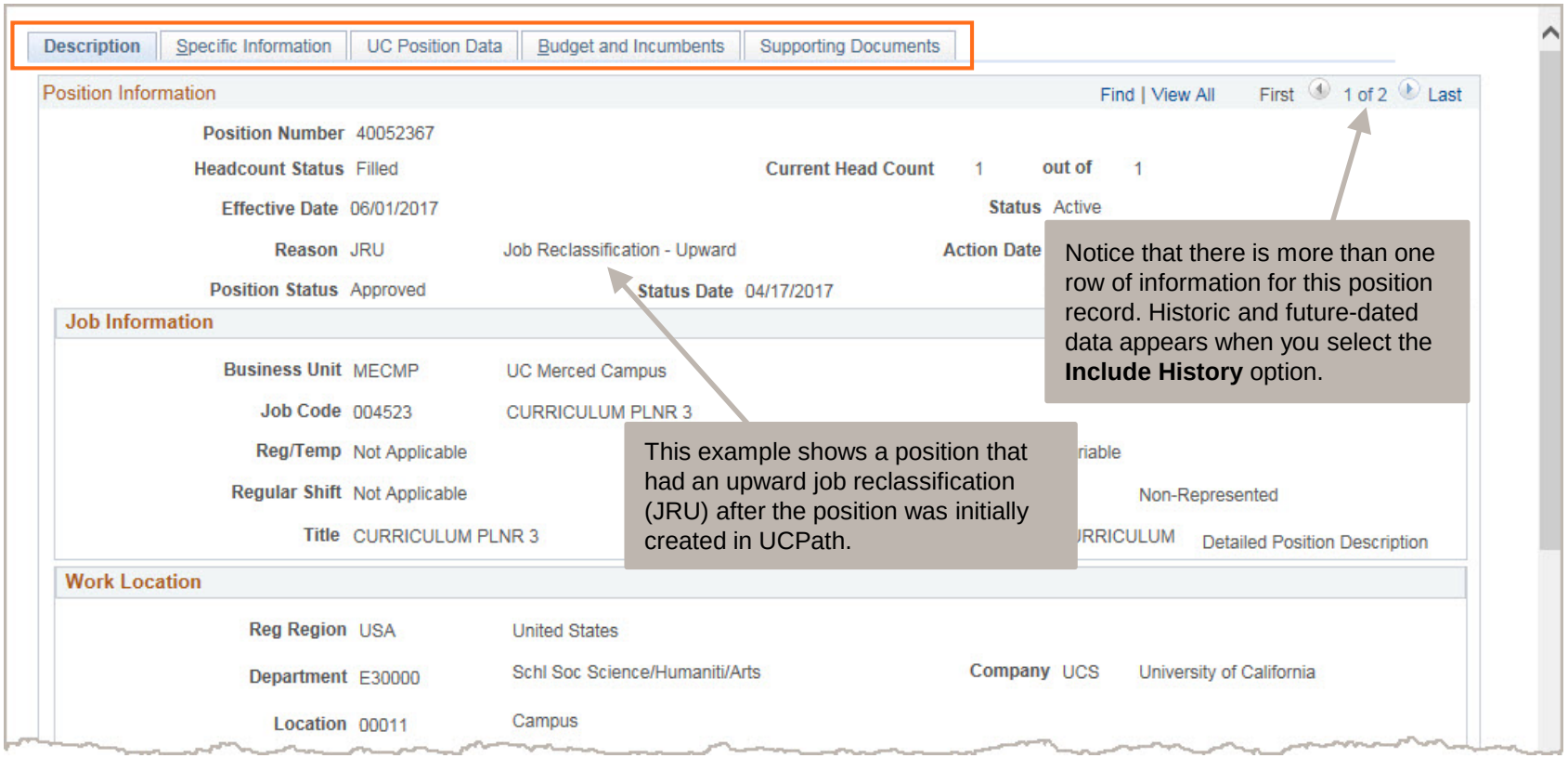
If you know the position number, enter it and click **Search**.

Select the **Include History** option to access and view position data rows.

If you do not know the position number, you can use other known values, as in this example.

View Position Data

Navigation: PeopleSoft Menu > Organizational Development > Position Management > Maintain Positions/Budgets > **Add/Update Position Info**



Notice that there is more than one row of information for this position record. Historic and future-dated data appears when you select the **Include History** option.

This example shows a position that had an upward job reclassification (JRU) after the position was initially created in UCPath.

Exercise

View Position Information

- This is your opportunity to practice this task on your own.
- Launch the **Try It** version of the topic.

View Position Summary Information

- Additional view-only pages in UCPath provide an overview of current and historical position data.
- Available summary pages are:

Position Summary

Displays current and historical information for a position on three tabs: **General**, **Work Location** and **Payroll Information**

Position History

Displays summary data for currently and previously assigned incumbents, including name, position entry and exit dates, and compensation rate

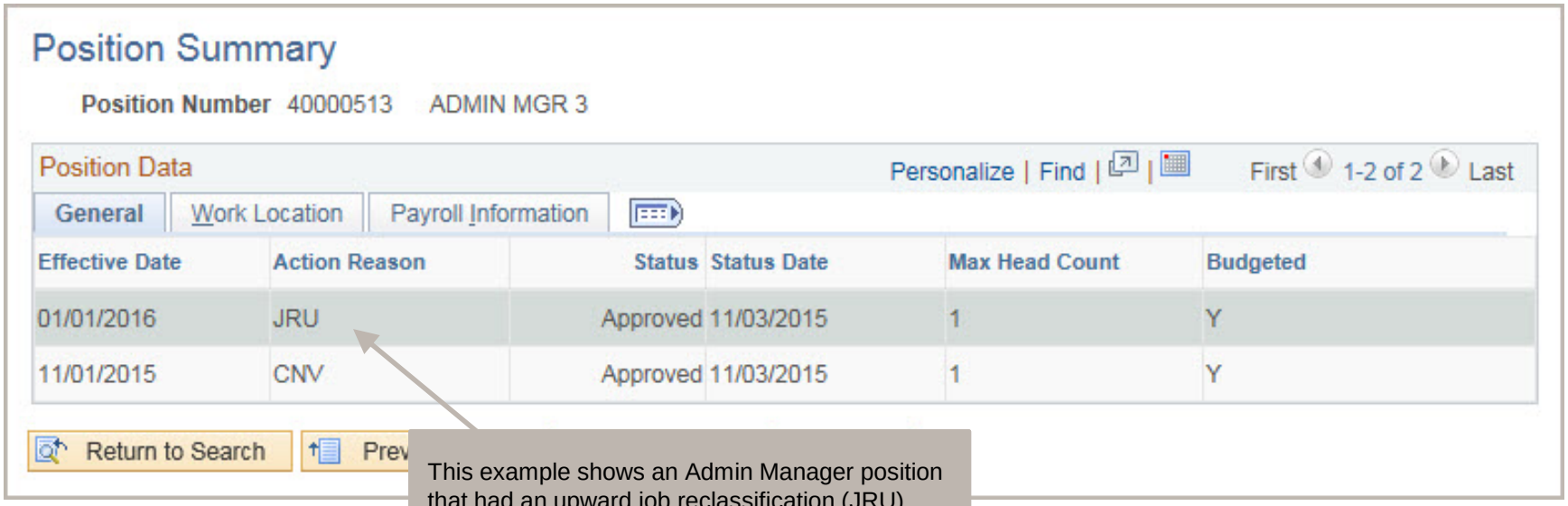
Vacant Budgeted Positions

Displays summary data for a department's vacant positions, including position number, description, position status and reports to position

Position Summary

Use to view a position's current and historical summary information.

Navigation: PeopleSoft Menu > Organizational Development > Position Management > Review Position/Budget Info > **Position Summary**

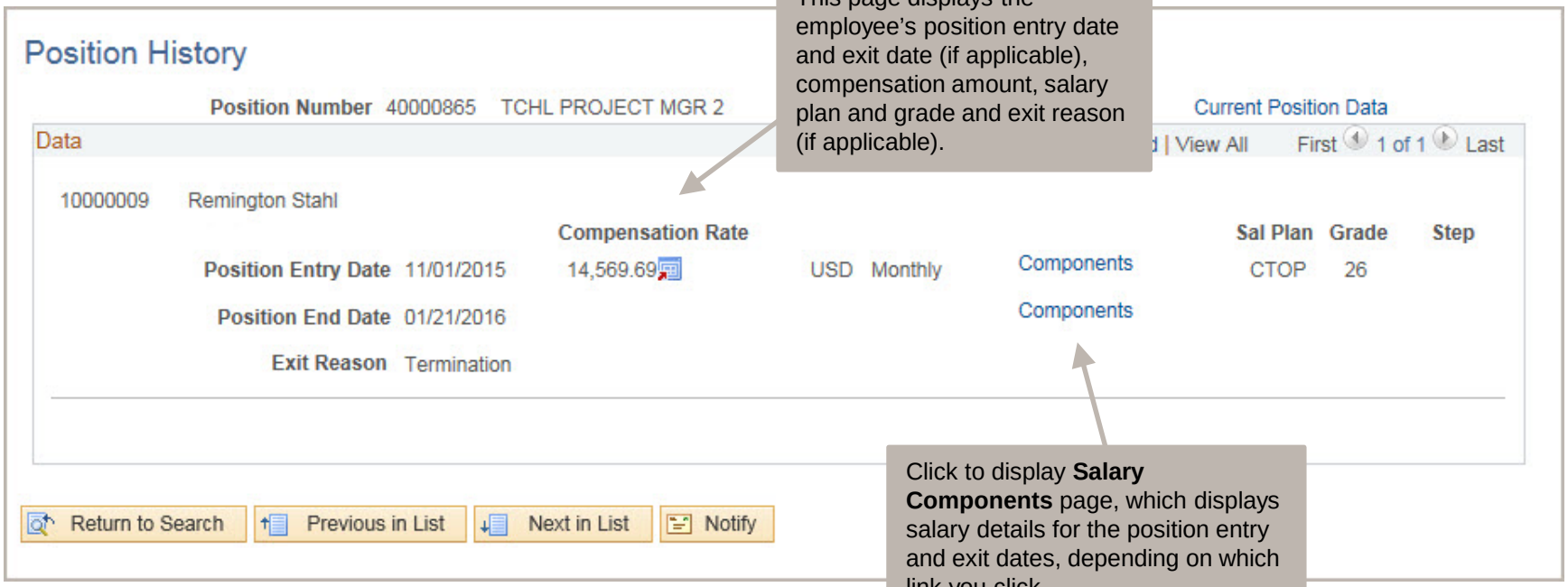


This example shows an Admin Manager position that had an upward job reclassification (JRU) after the position was initially created in UCPath.

Position History

Use to view information for incumbents currently and previously assigned to a position.

Navigation: PeopleSoft Menu > Organizational Development > Position Management > Review Position/Budget Info > **Position History**



This page displays the employee's position entry date and exit date (if applicable), compensation amount, salary plan and grade and exit reason (if applicable).

Click to display **Salary Components** page, which displays salary details for the position entry and exit dates, depending on which link you click.

Vacant Budgeted Positions

Use to view a summary of a department's currently vacant positions.

Navigation: PeopleSoft Menu > Organizational Development > Position Management > Review Position/Budget Info > **Vacant Budgeted Positions**

In this example, there are 83 vacancies in the selected department.

Vacant Budgeted Positions

Set ID UCOP1 **Department** 816200 LOCAL HR SRVCS **Total Vacant Positions** 83

Data

Personalize | Find | View All | First 1-10 of 18 Last

Position Data | Job Information | Work Location

Position	Description	Position Status	Reports To	Short Description	Vacant Positions	Max Head Count	Full/Part Time	Regular/Temporary
40001034	BENEFITS ANL 4 GF	Approved	40001065	HR MGR 1	1	1	Fixed	Not Applicable
40001287	RET CUSTOMER SVC REPR 1	Approved	40000428	BENEFITS S	1	1	Fixed	Not Applicable
40001321	RET CUSTOMER SVC REPR 1	Approved	40000428	BENEFITS S	1	1	Fixed	Not Applicable
40001330	HR AST 2	Approved	40000406	TRAINING D	1	1	Fixed	Not Applicable
40001332	BLANK AST 3	Approved	40000488	PROJECT PO	1	1	Fixed	Not Applicable
40001397	BLANK AST 2	Approved	40000845	BENEFITS S	1	1	Fixed	Not Applicable
40001408	RET CUSTOMER SVC REPR 1	Approved	40000428	BENEFITS S	1	1	Fixed	Not Applicable
40001486	FINANCIAL SVC ANL 2	Approved	40001473	EMPLOYMENT	3	4	Fixed	Not Applicable
40001509	EXEC AST 3	Approved	40000524	EXEC ADVIS	1	1	Fixed	Not Applicable
40001536	FINANCIAL ANL 2	Approved	40001473	EMPLOYMENT	1	1	Fixed	Not Applicable

Return to Search | Notify

Run Position Management Reports

- Several reports you can run to view position details
- **Navigation:** PeopleSoft Menu > Organizational Development, Position Management, Position Reports > **[select appropriate report]**

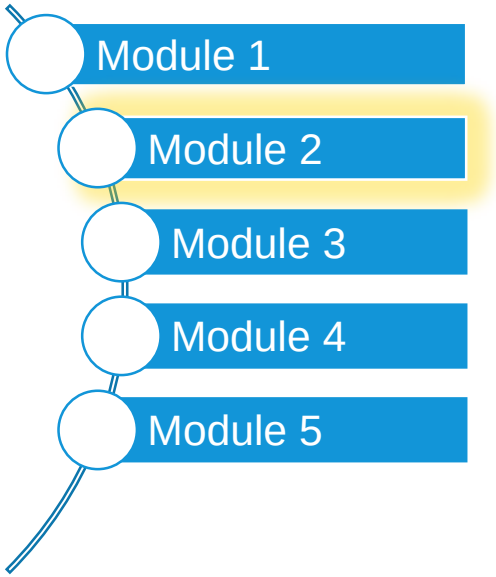
Report Name	Description
Position Status (POS001)	Lists the types of positions and all filled and vacant positions.
Active/Inactive Positions (POS002)	Lists the current position-related data for active positions, inactive positions, or both, depending on which report you select to run.
Incumbent History (POS003)	Lists, by position, all current and former incumbents, beginning with the current incumbent for each position and going back in time. Prints entry and exit dates for each incumbent, and starting and ending salaries.
Active Position History (POS004)	Lists all current and historical data related to a position, for all active positions.
Vacant Position (POS007)	Lists all currently vacant, budgeted positions.

Exercise

View Position History Data

- This is your opportunity to practice this task on your own.
- Launch the **Try It** version of the topic.

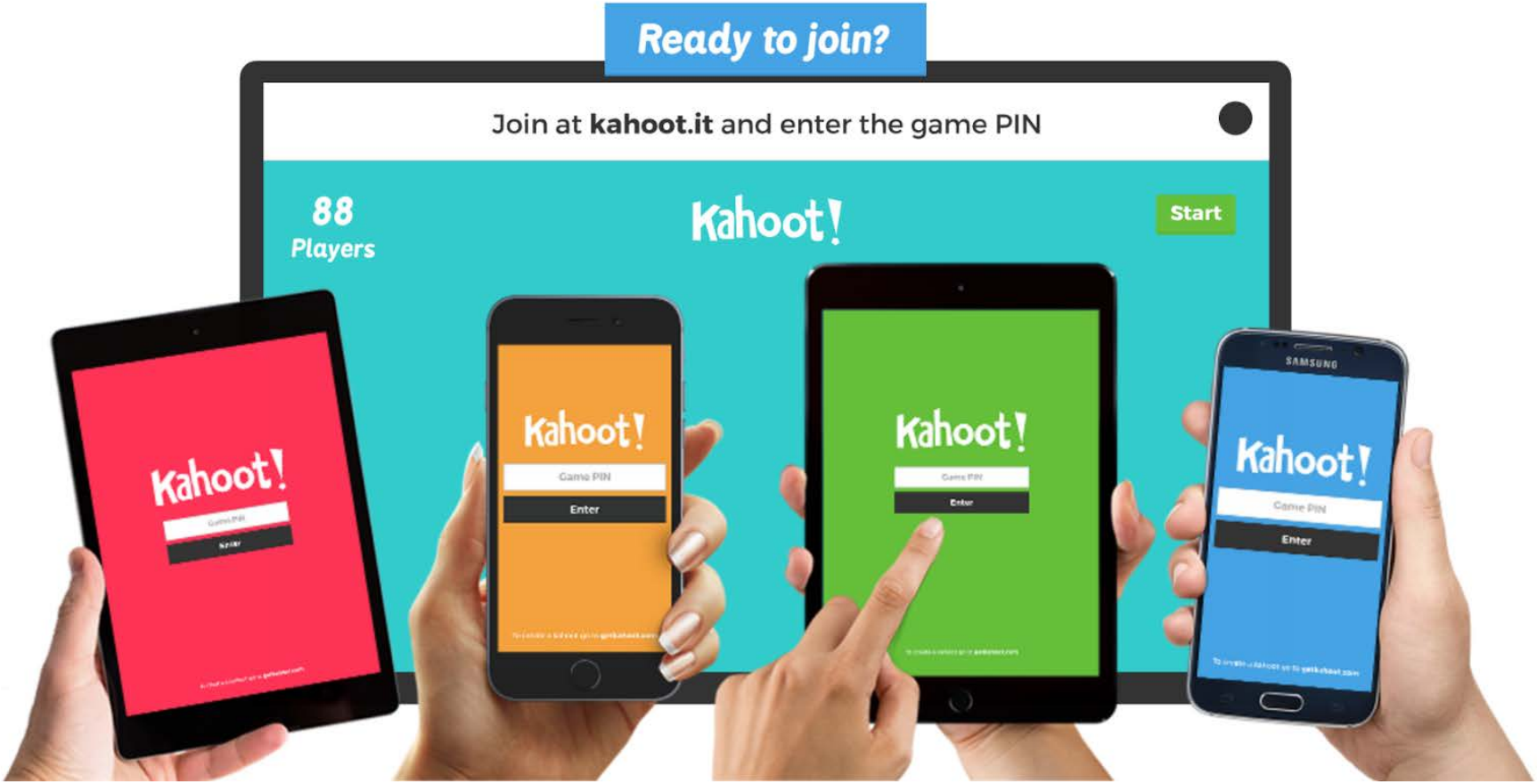
Module Objectives Review



Having completed this module, you should be able to:

- List the view-only pages and reports for viewing position summary data.
- View position summary data.

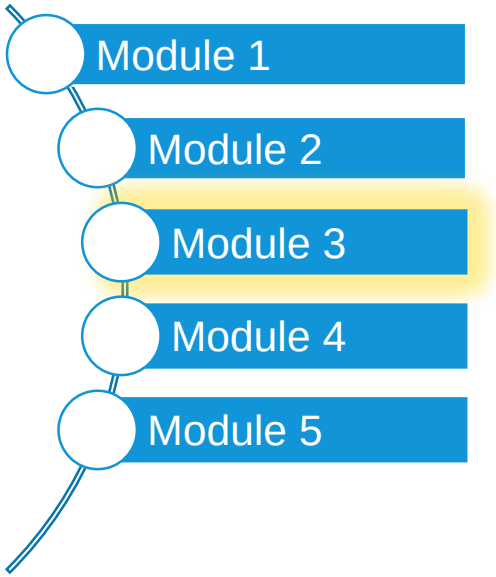
Check Your Understanding



Add New Positions

Module 3

Module Objectives



The module learning objectives are:

- Describe the add a new position process.
- Initiate a position control request for a new position.

Add New Position – Process Overview

- When a department identifies the need for a new position, it can be requested in UCPath. Refer to your Location's business process for guidelines on the pre-approval process.
- Org/department provides necessary position information to Position Initiator for entry into UCPath.
- Position Initiator requests new position through **Position Control Request** page, which is routed through AWE workflow.

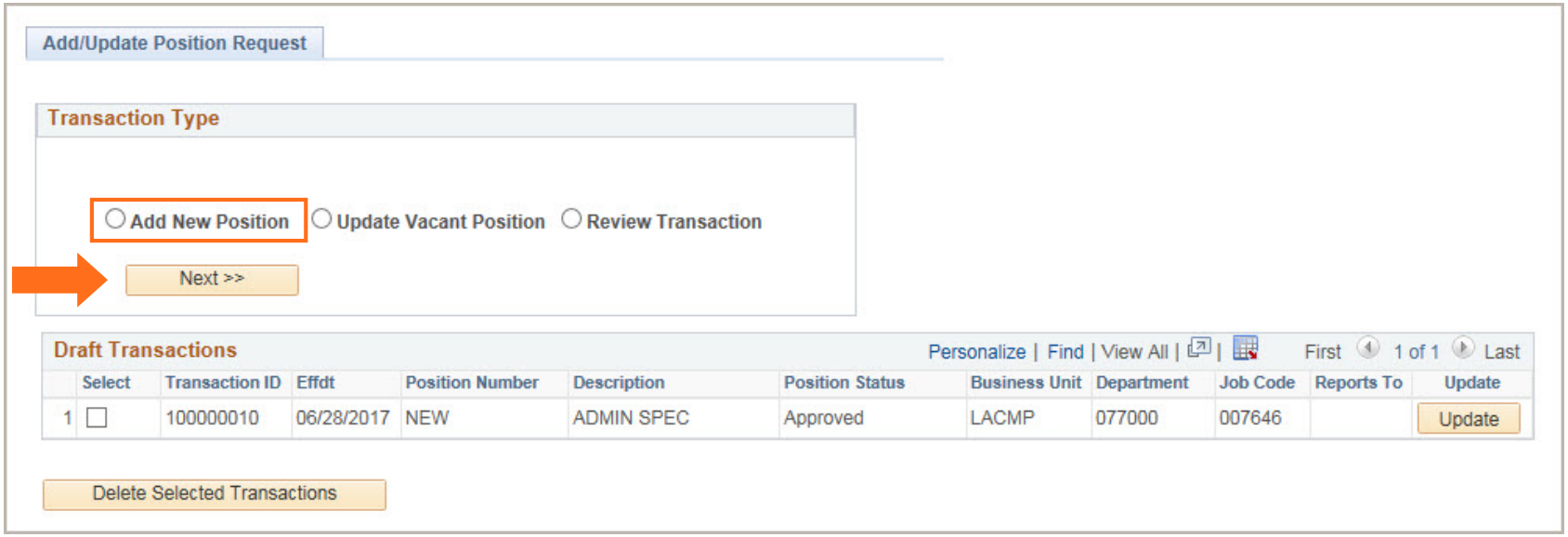
Add New Position – System Process

1. Navigate to **Position Control Request** page
2. Select **Add New Position** option and click **Next**
3. Enter position information
4. Click **Save and Submit** to route request through AWE workflow

Add/Update Position Request Page

Navigation: PeopleSoft Menu > UC Customizations> **Position Control Request**

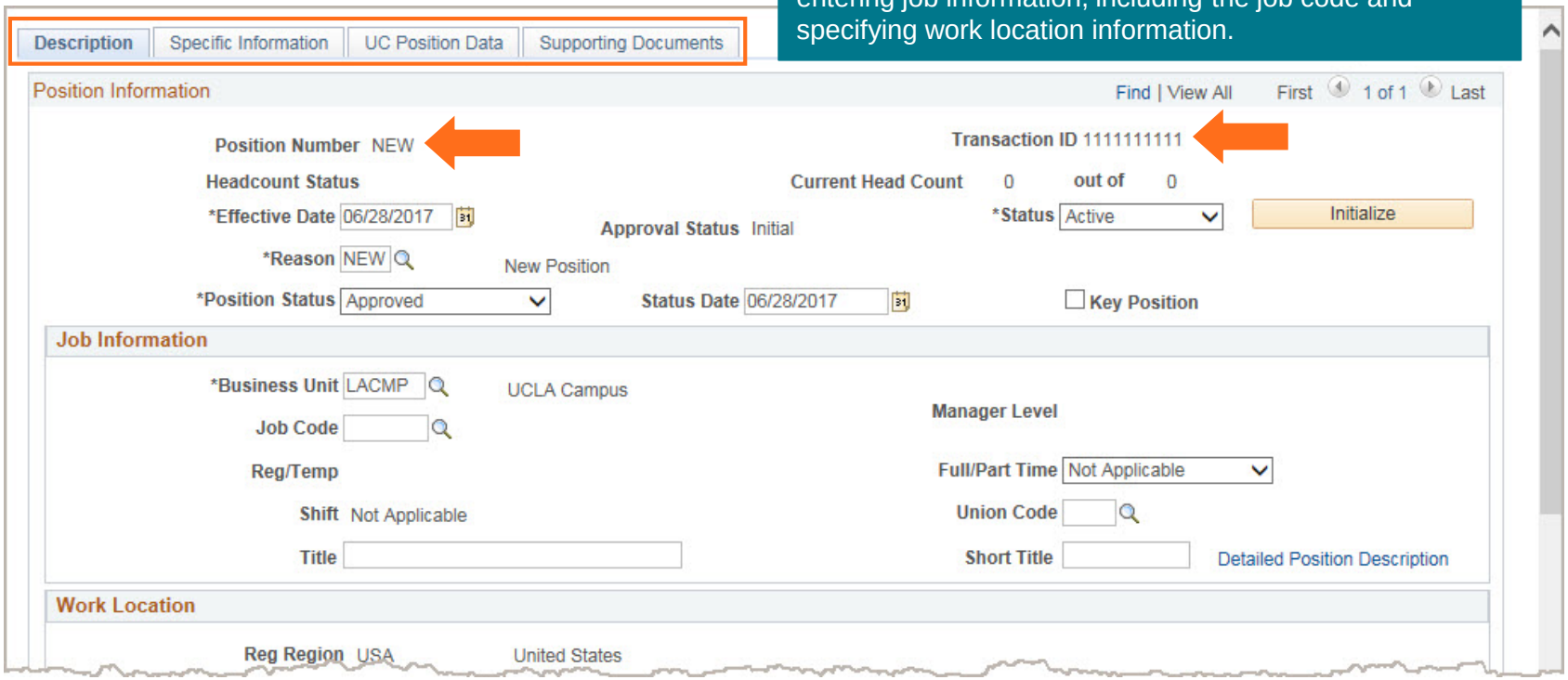
- The system displays the **Add/Update Position Request** page.
- Click the **Add a New Position** option and click **Next** to begin the steps for adding a new position control request.



Position Control Request Component

Use the **Position Control Request** component to enter details regarding the new position you are requesting.

The initial steps for requesting a new position include entering the date on which the position becomes effective, entering job information, including the job code and specifying work location information.



Exercise

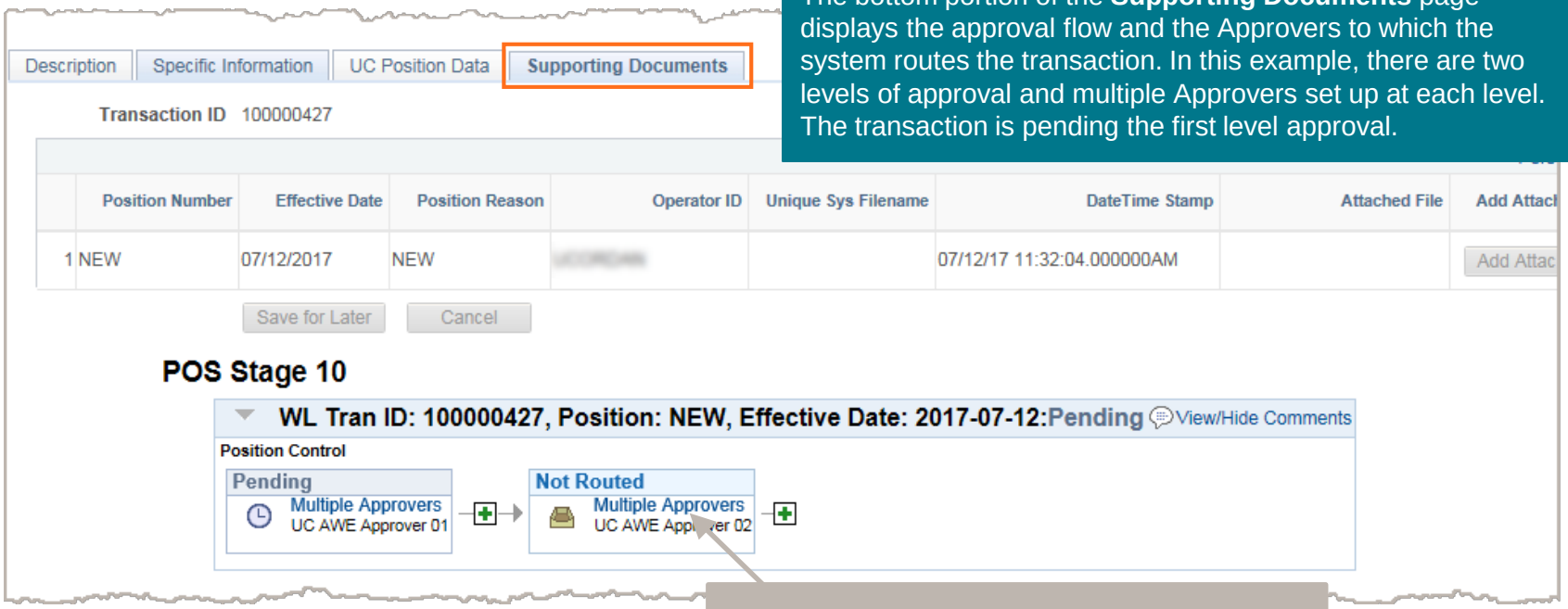
Initiate New Position Control Request

- This is your opportunity to practice this task on your own.
- Launch the **Try It** version of the topic.

Approval Workflow

When you successfully save and submit a Positon Control Request transaction, the system automatically routes it to the appropriate Location Approver(s).

The bottom portion of the **Supporting Documents** page displays the approval flow and the Approvers to which the system routes the transaction. In this example, there are two levels of approval and multiple Approvers set up at each level. The transaction is pending the first level approval.



To display the specific Approvers' names for an approval level, click the **Multiple Approvers** link.

Email Notifications

System-generated notifications confirm when your Position Control transaction is submitted and when it is approved.

From: [redacted]
To: [redacted]
Subject: Position Control transaction updated
Sent: Tue 7/18/2017 1:47 PM

Your position control has been submitted for approval for:

Position No - NEW
Dept ID - E20000
Title - INFO SYS ANL 2
Transaction ID - 100000018

Please check the transaction online for comments at
https://sucs4j.universityofcalifornia.edu/psp/SUCS4J/EMPLOYEE/HRMS/c/UC_EXTENSIONS.UC_POS_REQ_APPR.GBL?Page=UC_POS_REQ_APPR&Action=U&TRANSACTIONID=100000018&POSITION_NBR=NEW&ACTION_DATE=2017-07-18

This communication was sent via Oracle Workflow Technology. Please do not reply to this email.

From: [redacted]
To: [redacted]
Subject: Position Control transaction approved
Sent: Thu 7/20/2017 10:53 AM

Your Position Control transaction has been approved and processed as follows:

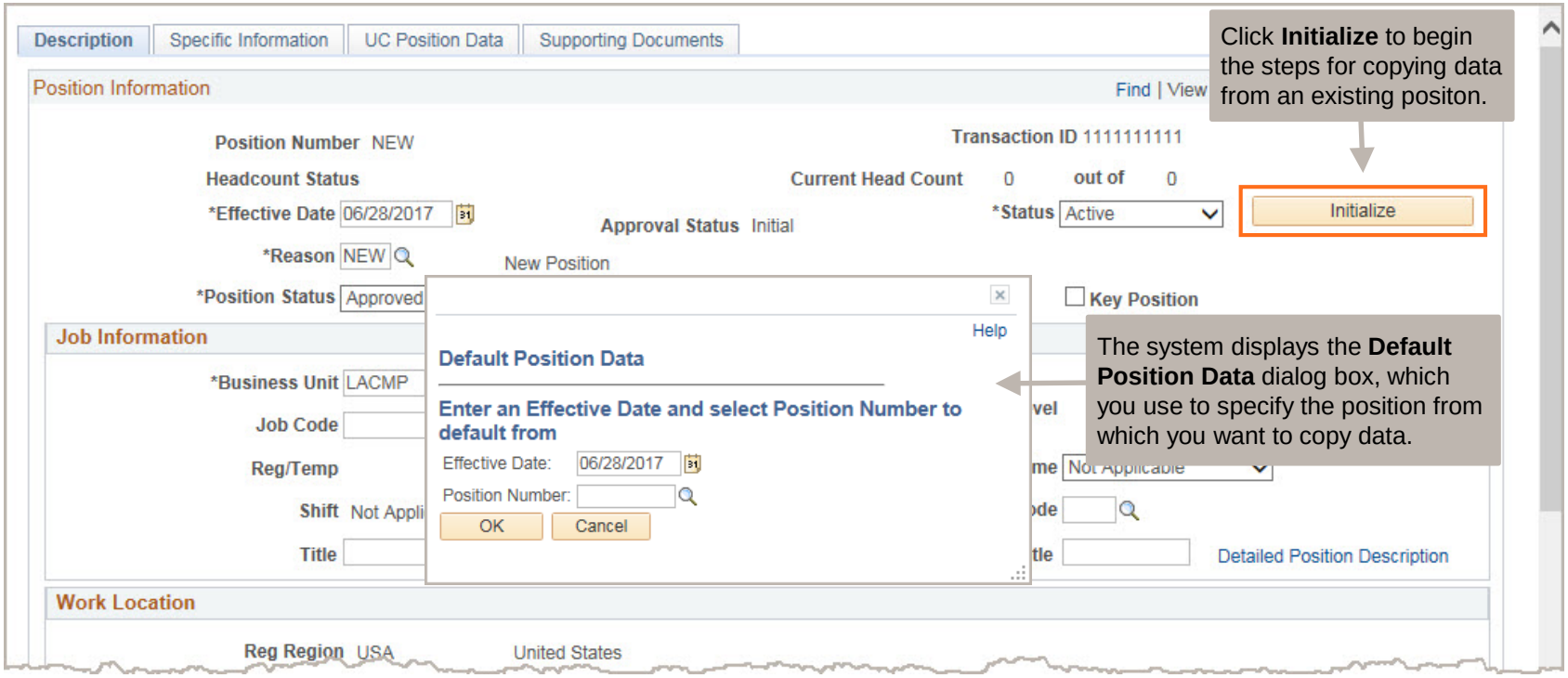
Position No - 40160242
Dept ID - 052000
Title - BLANK AST 2
Transaction ID - 100000009

You can view this transaction at
https://sucs4j.universityofcalifornia.edu/psp/SUCS4J/EMPLOYEE/HRMS/c/UC_EXTENSIONS.UC_POS_REQ_APPR.GBL?Page=UC_POS_REQ_APPR&Action=U&TRANSACTIONID=100000009&POSITION_NBR=NEW&ACTION_DATE=2017-07-20

This communication was sent via Oracle Workflow Technology. Please do not reply to this email.

Copy an Existing Position

You can copy information from an existing position in UCPath to initiate a request for a new one.

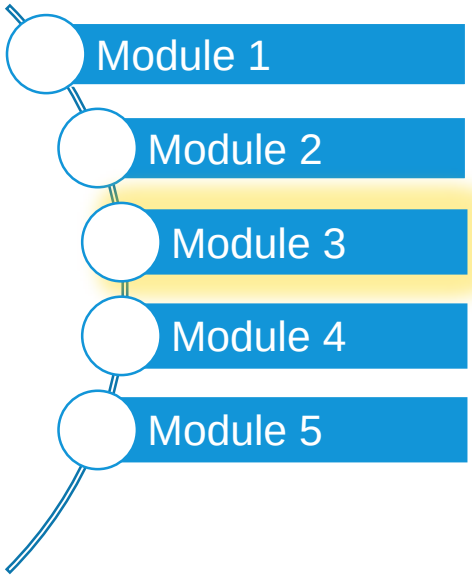


Exercise

Initiate New Position Control Request – Copy Existing Position

- This is your opportunity to practice this task on your own.
- Launch the **Try It** version of the topic.

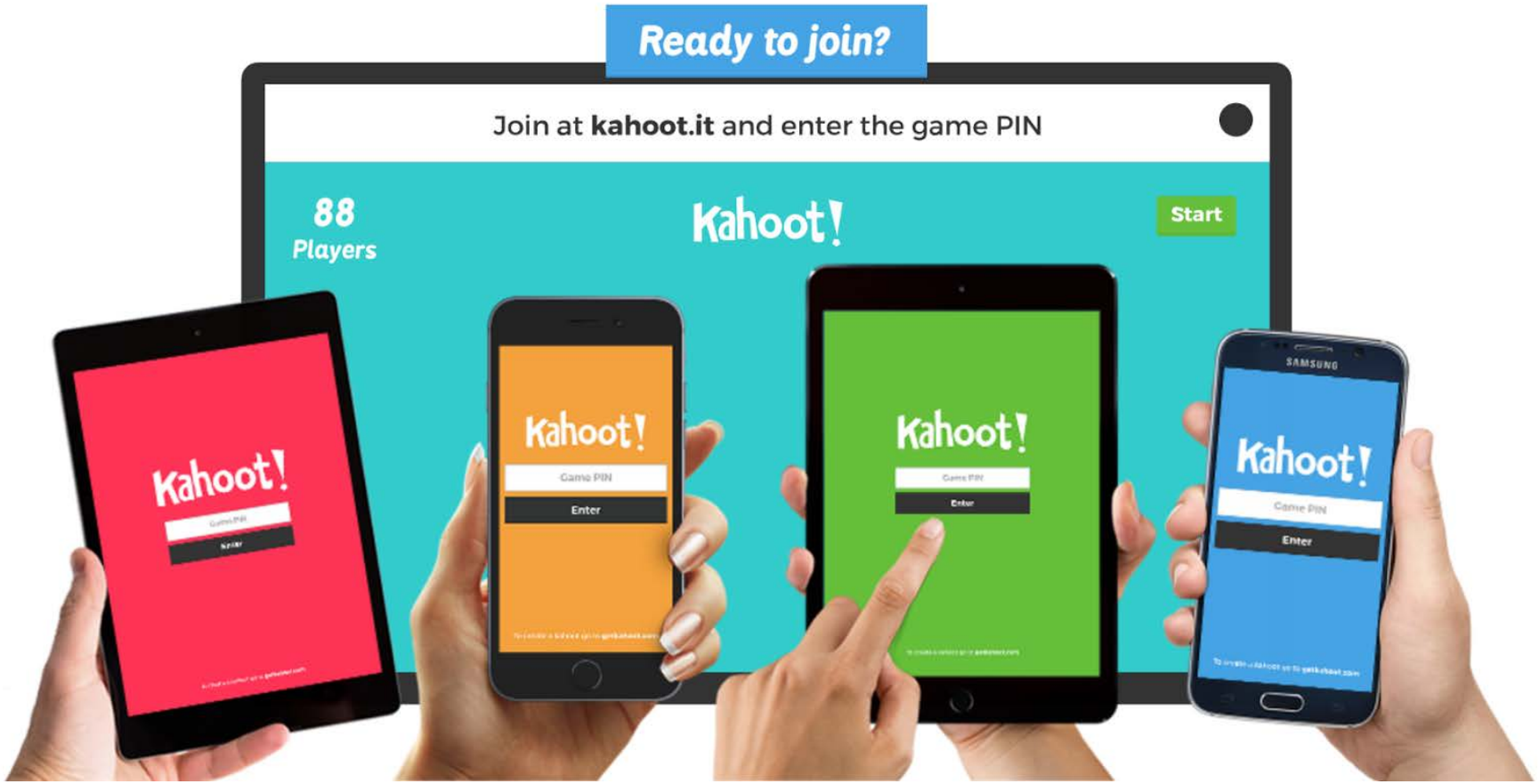
Module Objectives Review



Having completed this module, you should be able to:

- Describe the add a new position process.
- Initiate a position control request for a new position.

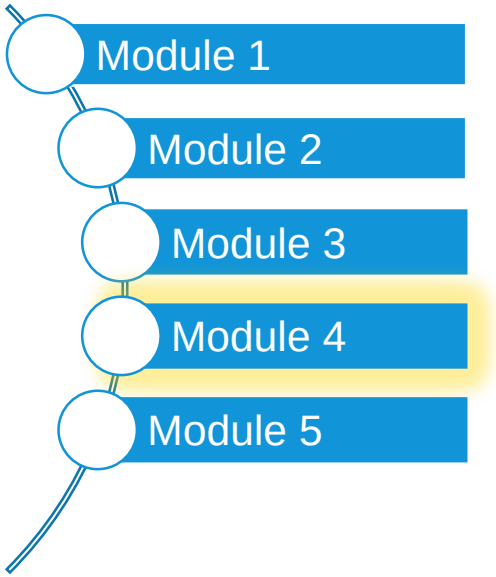
Check Your Understanding



Update Vacant Positions

Module 4

Module Objectives



The module learning objectives are:

- Describe the update vacant position process.
- Initiate a position control request for updates to a vacant position.

Update Vacant Position – Process Overview

- There are times when you must update a vacant position's data, such as the reports to position, job code, salary plan and so forth.
- A vacant position is unfilled on or after the effective date you enter on the **Find an Existing Value** page of the Position Control Request.
- Since there is not an incumbent employee, there are fewer downstream effects to updating a vacant position.
- You initiate updates to a filled position via a PayPath transaction.
- Position Administrators must enter updates to the **Business Unit** or **Department** using the **Add/Update Position Info** component.
- If you are unsure of which position updates to make by initiating a Position Control Request, refer to your Location's business process.

Update Vacant Position – System Process

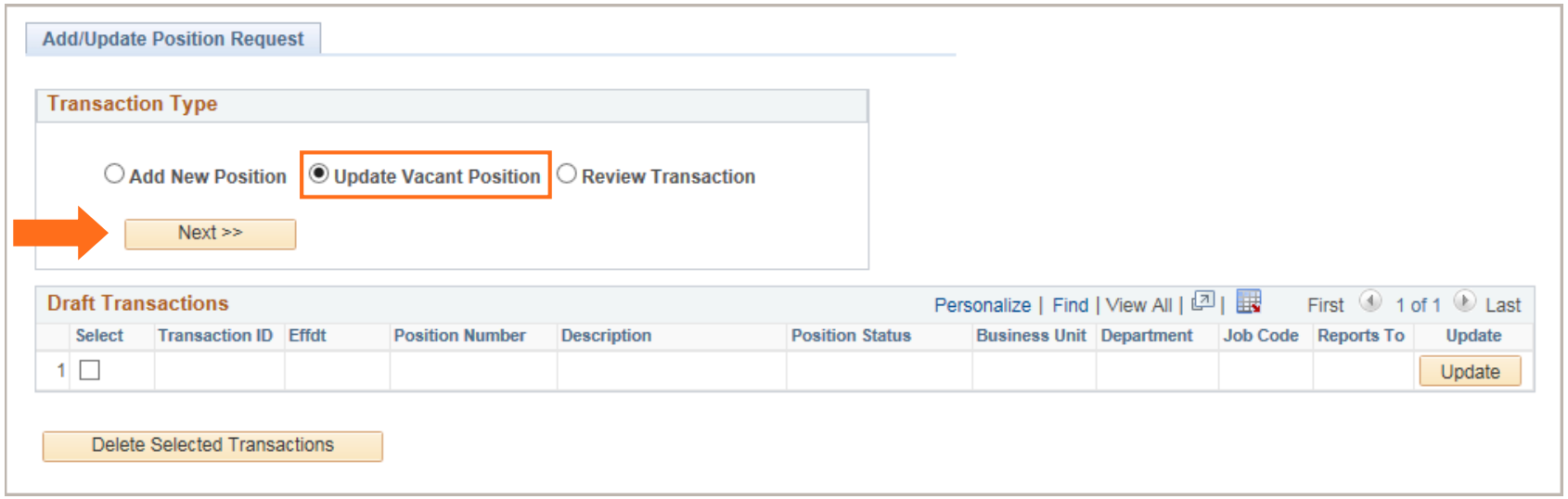
1. Navigate to **Position Control Request** page
2. Select **Update Vacant Position** option and click **Next**
3. Search for and select appropriate position
4. Update appropriate position data
5. Click **Save and Submit** to route request through AWE workflow

Add/Update Position Request Page

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Position Control Request**

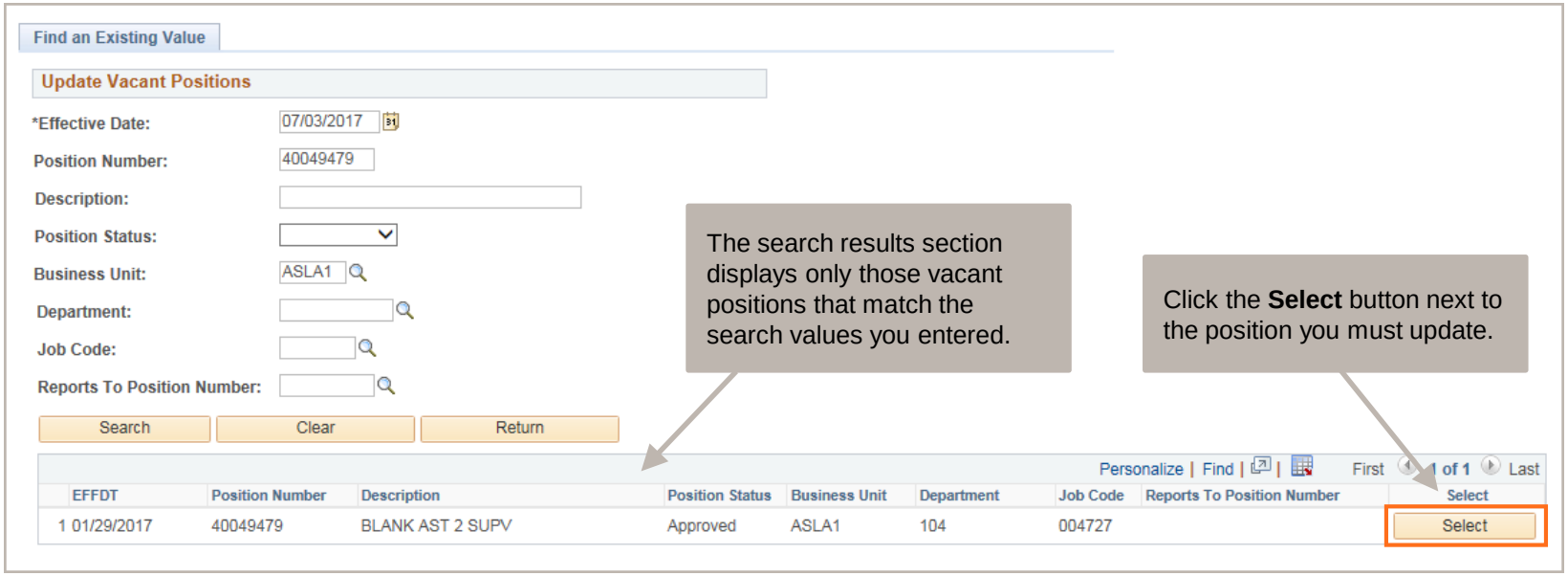
The system displays the **Add/Update Position Request** page.

Click the **Update Vacant Position** option and then click **Next** to begin the steps for initiating a position update control request.



Find an Existing Value Page

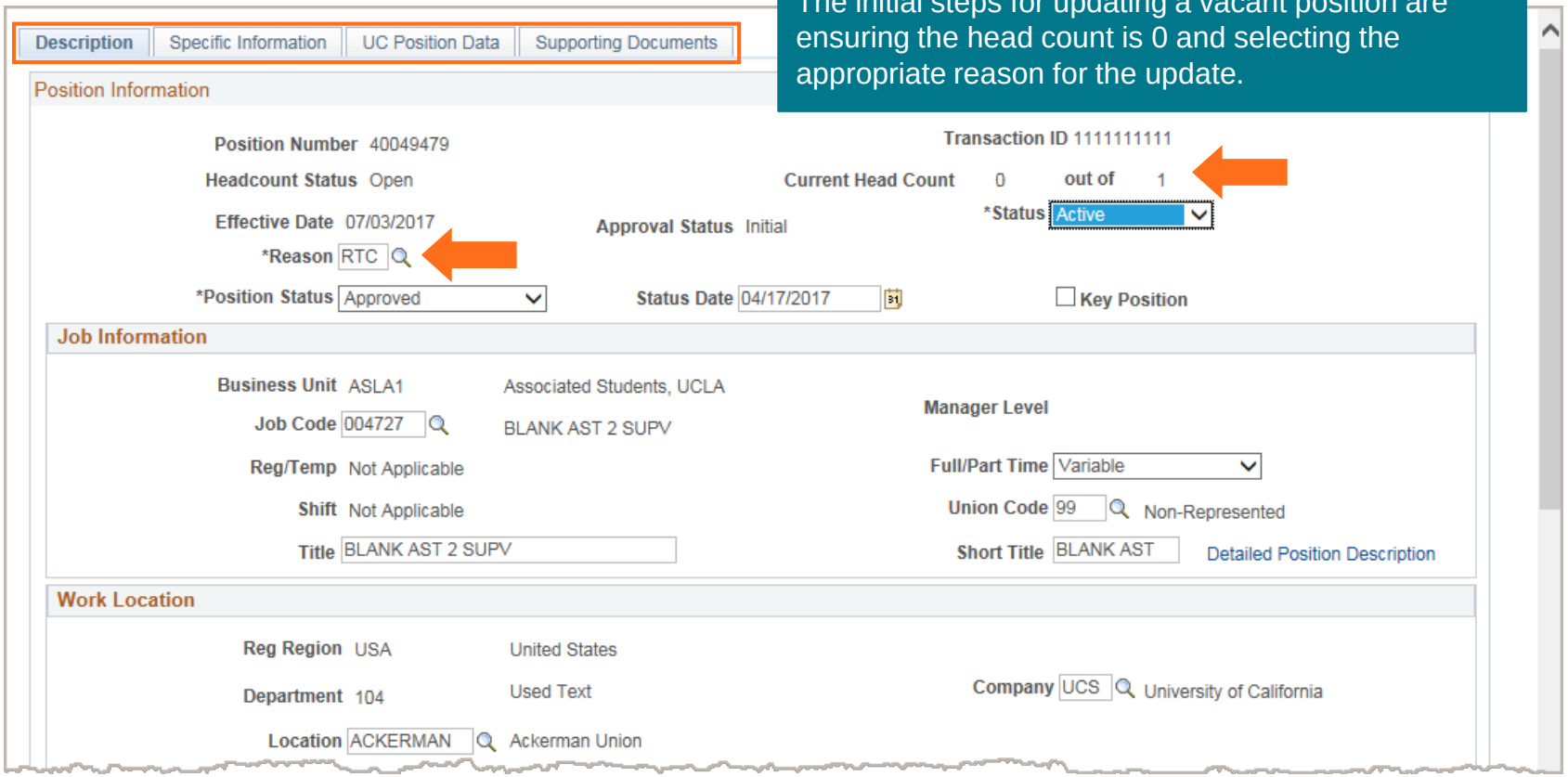
Use the **Find an Existing Value** page to search for the vacant position you want to update.



Position Control Request Component

Use the **Position Control Request** component to make changes to an existing position, such as moving the position from one department to another, updating the work phone or updating the position status.

The initial steps for updating a vacant position are ensuring the head count is 0 and selecting the appropriate reason for the update.



Reason Codes

There are several **Reason Codes** associated with a position update in UCPath.

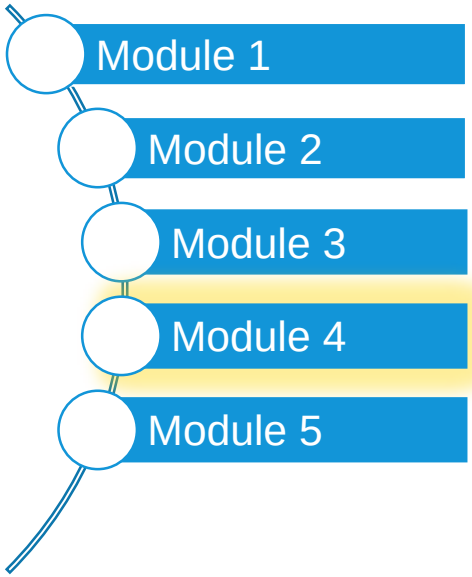
- Change in Duty Station
- Conversion Use Only
- Position Data Correction
- Change in Working Title
- Update Employee Relations Code
- FLSA Update- Does Not Meet
- FLSA Revert
- FLSA Override Due to Review
- Inactive - Bus Unit Transfer
- Inactive - No Plan to Refill
- Position Inactivated
- Job Data FTE Override
- Job Reclassification -Downward
- Job Reclassification - Lateral
- Job Reclassification - Upward
- Update Mail Code
- Permanent Increase in Time(FTE)
- Position Only Change
- Permanent Reduction - Layoff
- Promotion
- Permanent Reduction in Time(FTE)
- Regularization
- Re-Organization/Restructure
- Reports To Change
- Series Change
- Temporary Increase in Time
- Temporary Reduction in Time
- Transfer

Exercise

Initiate Update Vacant Position Request

- This is your opportunity to practice this task on your own.
- Launch the **Try It** version of the topic.

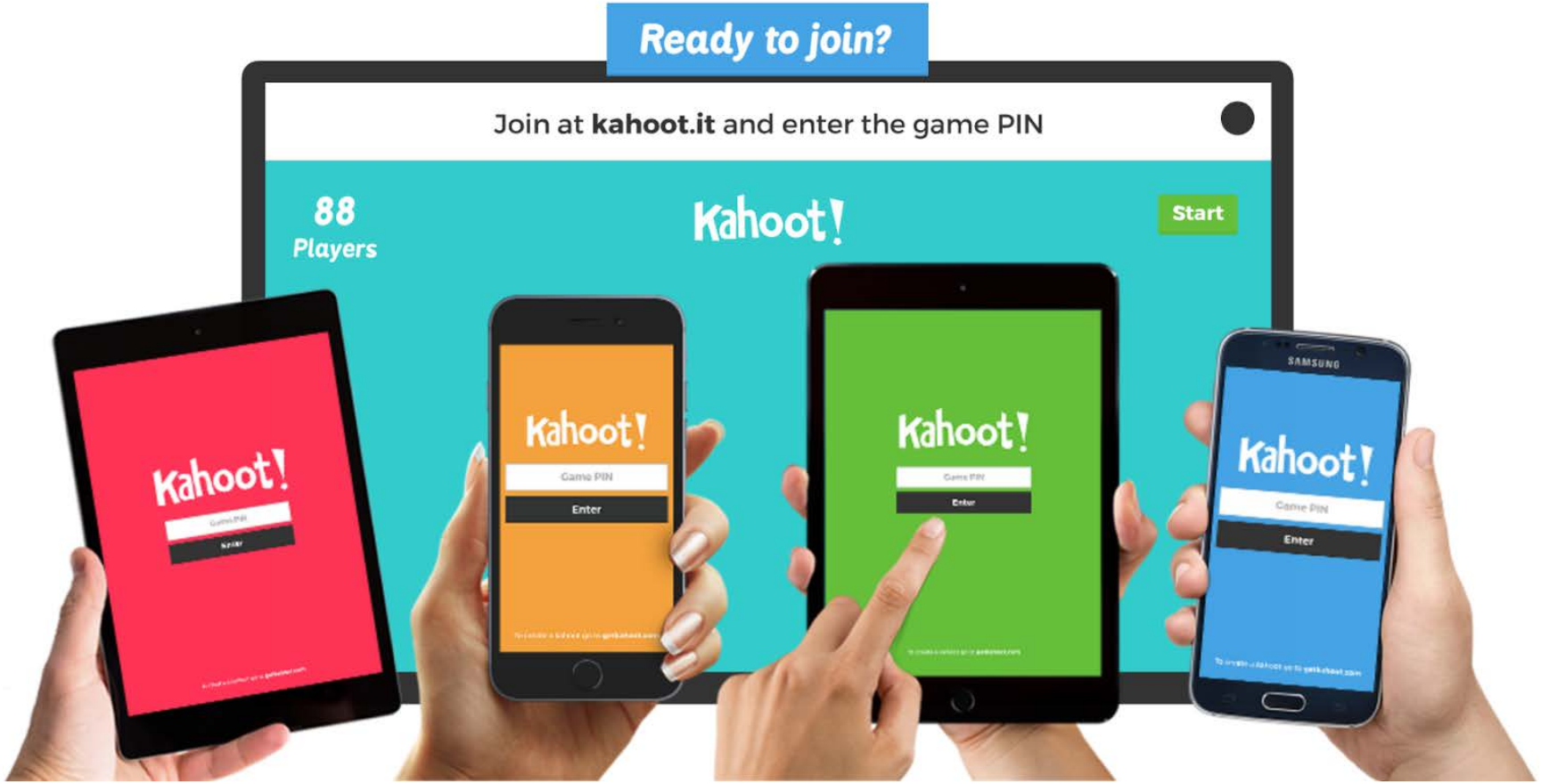
Module Objectives Review



Having completed this module, you should be able to:

- Describe the update vacant position process.
- Initiate a position control request for updates to a vacant position.

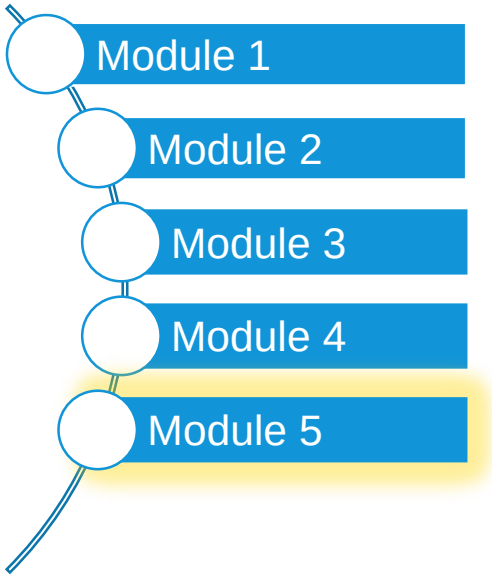
Check Your Understanding



Review Position Control Transactions

Module 5

Module Objectives

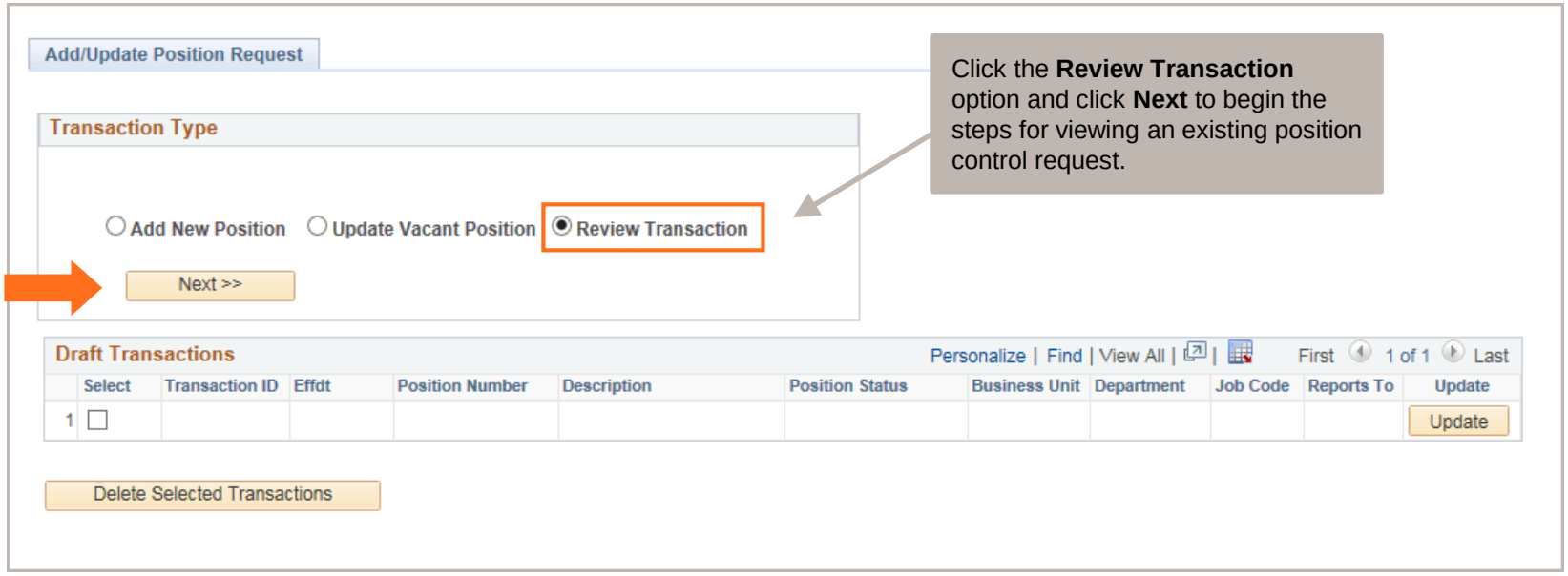


The module learning objective is:

- Access and view existing position control request transactions

Review Position Control Transactions

Use the same page on which you begin the steps for adding a new position or updating a vacant position to review transactions you've submitted.



Find an Existing Value Page

Use this page to enter known search criteria to narrow the search to only the position control transaction(s) you want to view.

Review Position Request

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Transaction ID:	=	
Effective Date:	>=	07/01/2017
Position Number:	begins with	
Descr:	begins with	
Approval Status:	=	Pending
Business Unit:	begins with	ASLA1
Department:	begins with	
Job Code:	begins with	
Reports To Position Number:	begins with	

Search | Clear | Basic Search | Save Search Criteria

You have the option to search for requests with any status by leaving the **Approval Status** field blank or you can search for requests with one or more specific statuses.

When the **Search Results** display more than one transaction, click the one you want to view.

Search Results

View All — First 1-2 of 2 Last

Transaction ID	Effective Date	Position Number	Descr	Position Status	Approval Status	Business Unit	Department	Job Code	Reports To Position Number
100000023	07/01/2017	NEW	FOOD SVC WORKER SR	Approved	Pending	ASLA1	211	005651	(blank)
100000024	07/01/2017	NEW	STDT 2	Approved	Pending	ASLA1	216	004921	(blank)

Position Control Request Component

Favorites | Main Menu > UC Customizations > UC Extensions > Position Control Request

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Help | Personalize Page

Description | Specific Information | UC Position Data | Supporting Documents

Position Information — Find | View All — First 1 of 1 Last

Position Number NEW
Transaction ID 100000023
Headcount Status
Current Head Count 0 **out of** 1
Effective Date 07/01/2017
Approval Status Pending
Status Active
Reason NEW New Position
Position Status Approved
Status Date 08/13/2017
☐ **Key Position**

Job Information

Business Unit ASLA1 Associated Students, UCLA
Manager Level
Job Code 005651 FOOD SVC WORKER SR
Reg/Temp Not Applicable
Full/Part Time Not Applicable
Shift Not Applicable
Union Code SX Service
Title FOOD SVC WORKER SR
Short Title FOOD SVC W Detailed Position Description

Work Location

Reg Region USA United States
Department 211 Greenhouse
Company UCS University of California
Location ACKERMAN Ackerman Union

Review Transactions Page

Navigation: PeopleSoft Menu > Self Service > **Review Transactions**

Use this page to search for and access **Position Control** transactions you have submitted for approval.

Review Transactions

Ima Gudadmin

This page allows you to view the status and relevant information for any transaction you either submitted for approval or have reviewed yourself. For each request you can get detailed information by selecting the hyperlink.

Approval Status I have submitted

Approval Process UC_ASLA1_Position_Ctl

Refresh

Approval Transactions — Find — First 1-2 of 2 Last

Transaction Name	Submitted By	Submitted On Behalf Of	Submitted On	Thread Status	
Position Cotrol	Ima Gudadmin		8/01/2017 - 4:52 PM	Pending	View Details

Transaction Details

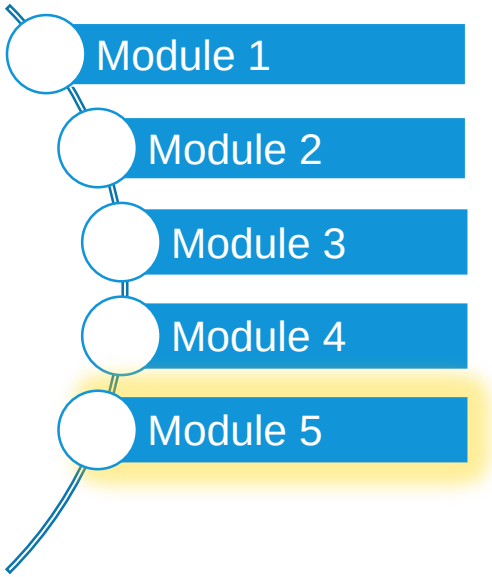
Date of action	Position Nbr	Transaction ID
2017-08-01	NEW	100000023

Transaction Name	Submitted By	Submitted On Behalf Of	Submitted On	Thread Status	
Position Cotrol	Ima Gudadmin		8/01/2017 - 4:55 PM	Pending	View Details

Transaction Details

Date of action	Position Nbr	Transaction ID
2017-08-01	NEW	100000024

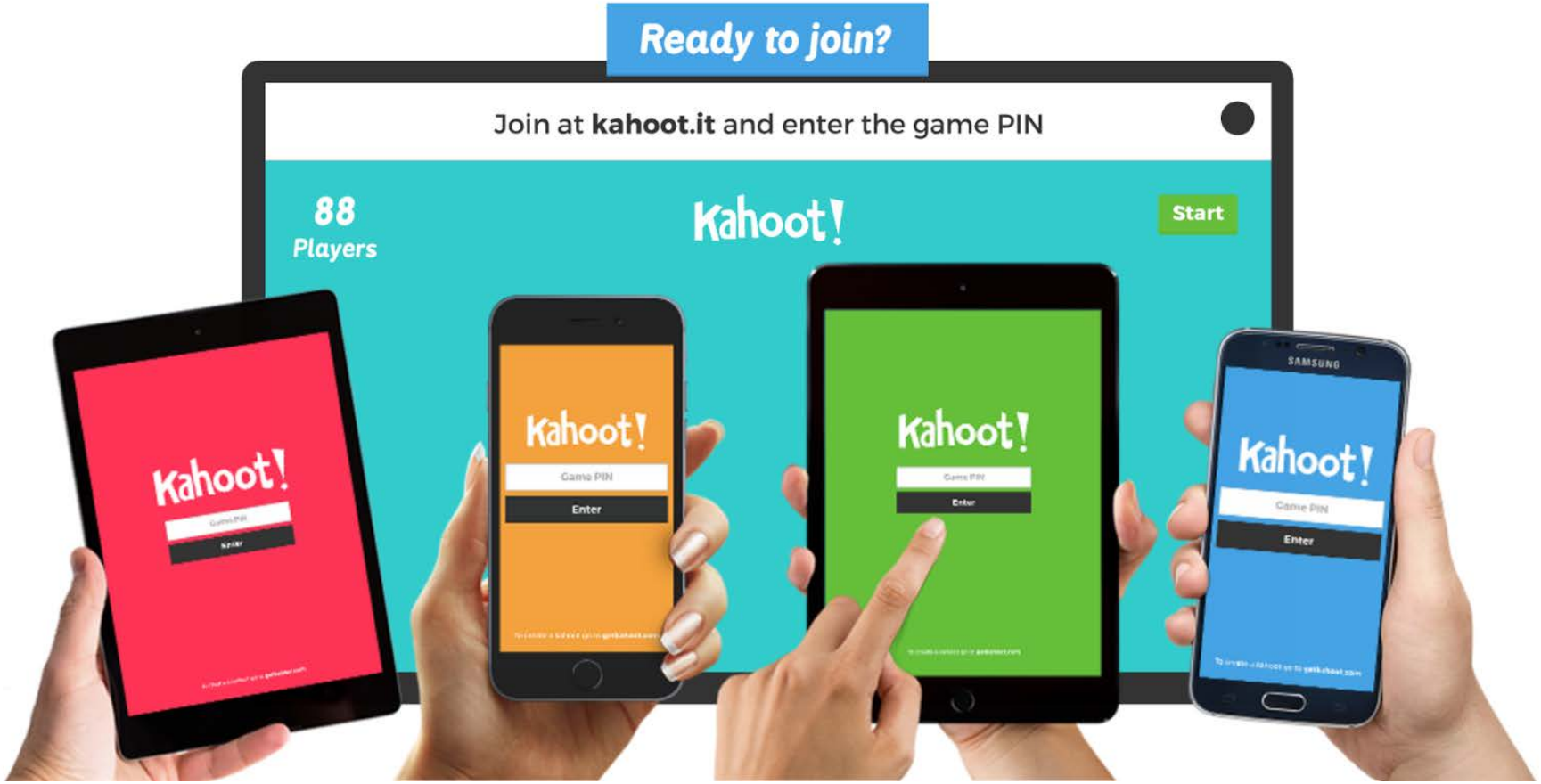
Module Objectives Review



Having completed this module, you should be able to:

- Access and view existing position control request transactions

Check Your Understanding



Course Review

Course Agenda

1: Position Management Overview

2: View Position Summary Data

3: Add New Positions

4: Update Vacant Positions

5: Review Position Control Transactions

Putting It All Together

- **Position Control Requests** utilize AWE to route transactions locally for approval before writing to UCPath.
- Because there is not an incumbent employee, there are fewer downstream effects to updating a vacant position.
- A vacant position is one that is unfilled on or after the effective date you enter on the **Find an Existing Value** page of the **Position Control Request**.
- There are several **Reason Codes** associated with a vacant position update in UCPath, including **Change in Working Title**, **Update Mail Code**, **Position Data Correction** and more.
- UCPath provides view-only pages, which display current and historical position data. For example, use the **Position Summary** page to view a position's current and historical summary information.

Course Objectives Review

Having completed this course, you should be able to:

- Identify features of the **Position Management** module.
- Explain the relationship between position data and job data.
- View current and historical position summary information.
- Initiate a position control request for a new position.
- Initiate a position control request for updates to a vacant position.
- Access and view existing position control request transactions.

Where to Get Help

- The **UCPath Help** site is your first level of support. Search for conceptual content, job aids or step-by-step instructions for UCPath tasks.
  - From the UCPath portal homepage, expand the **Help / FAQ** section on the left side of the page and then click the appropriate link to open the site. An Adobe PDF version is available for users with screen readers.
  - From any UCPath page or component, click the **Help** link in the upper right corner of the page to find help topics specific to the page/component.

Additional Help

- **Have additional questions?**
  - Send your questions to fomucpathtraining@ucr.edu.
  - A FOM|UCPath Trainer will get back to you within 48 hours

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