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
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
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
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.
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.
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 Code 001001
ADMIN AST 2

Position 40000001
ADMIN AST 2 - PENSION & RETIREMENT PROGRAM
Emilio Montoya

Position 40000002
ADMIN AST 2 - LOCAL HR SRVCS
Toya Walker

Position 40000003
ADMIN AST 2 - UC WASHINGTON CTR
Priya Chopra

Position 40000004
ADMIN AST 2 - IMMED OFFICE GEN COUNSEL
Lee Choi
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.
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.

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.

Incumbent history is stored in Job Data tables, which allows for the reporting of 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.
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.
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.
UCR will initiate PayPath transactions for position changes that impact an incumbent employee’s job record.
Position Management Roles

**Position 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 Management Screen Screenshot]

- **Position Information**
  - Position Number: 40097578
  - Headcount Status: Filled
  - Effective Date: 07/01/2017
  - Status: Active
  - Position Status: Approved
  - Status Date: 08/11/2017
  - Action Date: 08/11/2017

- **Job Information**
  - Business Unit: RVCM01
  - Job Code: 00/1000
  - Reg/Temp: Not Applicable
  - Regular Shift: Not Applicable
  - Title: PROF_AY

- **Work Location**
  - Reg Region: USA
  - Department: E01027
  - Location: PS354
  - Reports To: 
  - Supervisor Level: 

- **Salary Plan Information**
  - Salary Admin Plan: TO01
  - Grade: 1
  - Step: 
  - Standard Hours: 20.00
  - Work Period: Weekly
  - Work Schedule:
    - Mon: 4.00
    - Tue: 4.00
    - Wed: 4.00
    - Thu: 4.00
    - Fri: 4.00
    - Sat: 
    - Sun: 

- **FLSA Status**
  - Exempt

- **Bargaining Unit**
  - 8888

UCPATH.UNIVERSITYOFCALIFORNIA.EDU
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 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

Ready to join?

Join at kahoot.it and enter the game PIN

88 Players

Kahoot!

Start

Game PIN

Enter

Game PIN

Enter

Game PIN

Enter
View Position Data

Module 2
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**.

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

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

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

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

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.
Exercise

View Position Information

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

<table>
<thead>
<tr>
<th>Position ID</th>
<th>Position Description</th>
<th>Position Status</th>
<th>Reports To</th>
<th>Short Description</th>
<th>Vacant Positions</th>
<th>Max Head Count</th>
<th>Full/Part Time</th>
<th>Regular/Temporary</th>
</tr>
</thead>
<tbody>
<tr>
<td>40001034</td>
<td>BENEFITS ANL 4 GF</td>
<td>Approved</td>
<td>40001065</td>
<td>HR MGR 1</td>
<td>1</td>
<td>1</td>
<td>Fixed</td>
<td>Not Applicable</td>
</tr>
<tr>
<td>40001287</td>
<td>RET CUSTOMER SVC REPR 1</td>
<td>Approved</td>
<td>40000428</td>
<td>BENEFITS S</td>
<td>1</td>
<td>1</td>
<td>Fixed</td>
<td>Not Applicable</td>
</tr>
<tr>
<td>40001321</td>
<td>RET CUSTOMER SVC REPR 1</td>
<td>Approved</td>
<td>40000428</td>
<td>BENEFITS S</td>
<td>1</td>
<td>1</td>
<td>Fixed</td>
<td>Not Applicable</td>
</tr>
<tr>
<td>40001330</td>
<td>HR AST 2</td>
<td>Approved</td>
<td>400000406</td>
<td>TRAINING D</td>
<td>1</td>
<td>1</td>
<td>Fixed</td>
<td>Not Applicable</td>
</tr>
<tr>
<td>40001332</td>
<td>BLANK AST 3</td>
<td>Approved</td>
<td>400000408</td>
<td>PROJECT PO</td>
<td>1</td>
<td>1</td>
<td>Fixed</td>
<td>Not Applicable</td>
</tr>
<tr>
<td>40001397</td>
<td>BLANK AST 2</td>
<td>Approved</td>
<td>400000845</td>
<td>BENEFITS S</td>
<td>1</td>
<td>1</td>
<td>Fixed</td>
<td>Not Applicable</td>
</tr>
<tr>
<td>40001408</td>
<td>RET CUSTOMER SVC REPR 1</td>
<td>Approved</td>
<td>40000428</td>
<td>BENEFITS S</td>
<td>1</td>
<td>1</td>
<td>Fixed</td>
<td>Not Applicable</td>
</tr>
<tr>
<td>40001486</td>
<td>FINANCIAL SVC ANL 2</td>
<td>Approved</td>
<td>40001473</td>
<td>EMPLOYMENT</td>
<td>3</td>
<td>4</td>
<td>Fixed</td>
<td>Not Applicable</td>
</tr>
<tr>
<td>40001509</td>
<td>EXEC AST 3</td>
<td>Approved</td>
<td>40000524</td>
<td>EXEC ADVIS</td>
<td>1</td>
<td>1</td>
<td>Fixed</td>
<td>Not Applicable</td>
</tr>
<tr>
<td>40001536</td>
<td>FINANCIAL ANL 2</td>
<td>Approved</td>
<td>40001473</td>
<td>EMPLOYMENT</td>
<td>1</td>
<td>1</td>
<td>Fixed</td>
<td>Not Applicable</td>
</tr>
</tbody>
</table>
Several reports you can run to view position details

**Navigation:** PeopleSoft Menu > Organizational Development, Position Management, Position Reports > [select appropriate report]

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Position Status</strong>  (POS001)</td>
<td>Lists the types of positions and all filled and vacant positions.</td>
</tr>
<tr>
<td><strong>Active/Inactive Positions</strong>  (POS002)</td>
<td>Lists the current position-related data for active positions, inactive positions, or both, depending on which report you select to run.</td>
</tr>
<tr>
<td><strong>Incumbent History</strong> (POS003)</td>
<td>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.</td>
</tr>
<tr>
<td><strong>Active Position History</strong> (POS004)</td>
<td>Lists all current and historical data related to a position, for all active positions.</td>
</tr>
<tr>
<td><strong>Vacant Position</strong> (POS007)</td>
<td>Lists all currently vacant, budgeted positions.</td>
</tr>
</tbody>
</table>
Exercise

View Position History Data

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

Ready to join?

Join at kahoot.it and enter the game PIN

88 Players

Start
Add New Positions

Module 3
The module learning objectives are:

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

- Navigate to Position Control Request page
- Select Add New Position option and click Next
- Enter position information
- Click Save and Submit to route request through AWE workflow
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.
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.
When you successfully save and submit a Position 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.

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://sucsa1.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=2017-07-13

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

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://sucsa1.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.
You can copy information from an existing position in UCPath to initiate a request for a new one.

Click **Initialize** to begin the steps for copying data from an existing position.

The system displays the **Default Position Data** dialog box, which you use to specify the position from which you want to copy data.
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.
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

Join at kahoot.it and enter the game PIN
Update Vacant Positions

Module 4
The module learning objectives are:

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

Navigate to Position Control Request page

Select Update Vacant Position option and click Next

Search for and select appropriate position

Update appropriate position data

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.

The search results section displays only those vacant positions that match the search values you entered. Click the **Select** button next to the position you must update.
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.
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

Ready to join?

Join at kahoot.it and enter the game PIN

88 Players

Kahoot!

Start

Enter

Kahoot!

Game PIN

Enter

Kahoot!

Enter

Kahoot!

Enter
Review Position Control Transactions

Module 5
The module learning objective is:

- Access and view existing position control request 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.

Click the **Review Transaction** option and click **Next** to begin the steps for viewing an existing position control request.
Use this page to enter known search criteria to narrow the search to only the position control transaction(s) you want to view.

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.
Position Control Request Component

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

Job Information
- **Business Unit**: ASLA1
- **Job Code**: 005651
- **Reg/Temp**: Not Applicable
- **Shift**: Not Applicable
- **Title**: FOOD SVC WORKER SR
- **Manager Level**: Not Applicable
- **Full/Part Time**: Not Applicable
- **Union Code**: SX
- **Short Title**: FOOD SVC W
- **Detailed Position Description**: [ ]

Work Location
- **Reg Region**: USA
- **Department**: 211
- **Location**: ACKERMAN
- **Company**: UCS
- **University of California**
Navigation: PeopleSoft Menu > Self Service > Review Transactions

Use this page to search for and access Position Control transactions you have submitted for approval.
Having completed this module, you should be able to:

- Access and view existing position control request transactions
Check Your Understanding

Ready to join?

Join at kahoot.it and enter the game PIN

88 Players

Start
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
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