Administrative Applications — Business Process Guide

Process: Create a New Position
Module: Position Management

High Level Description

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Overview

This guide will show you how to create a new position. It will include the use of the Initialize functionality, walking through the steps of copying an existing position to create a new one.
Notice about the new version of PeopleSoft
All page shots used in this guide are from the previous version of PeopleSoft (HCM 8.9). Please be advised that from the fourth week of February 2012, we are using the new version of PeopleSoft (HCM 9.0) and you may experience a difference in the way the new pages look and feel.

In the new version of PeopleSoft (HCM 9.0), the format of how the Main Menu expands has changed, but the actual navigation path and functionality has not changed. See the sample page shot.

Other minor changes include the following:

- Improved color scheme
- New look for Processing and Save indicators
- Pop-up Search Window and Edit Boxes
- Number of Search Results Option
- Type Ahead Matching

Create a New Position
Navigate to Add/Update Position Info Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info

The Add/Update Position Info search page displays.

1. Click the Add a New Value tab

The Add/Update Position Info Add a New Value page displays.

The Position Number defaults to 8 zeros. Do not change this. The system automatically assigns the position number when you save the newly added position.

2. Click Add

The Description page displays.

Field Definitions and Actions to be Taken
Position Number: The value will remain as 8 zeros until saved.
Current Head Count: This will be 0 out of 0 until the position is filled.
Effective Date: Enter the date the position will become effective. The date can be in the past. This value defaults to the current date.
Status: This defaults to Active and should not be changed upon creation of a new position.
Reason: This defaults to NEW and should not be changed upon creation of a new position.
Action Date: This is the date on which you are entering the data. It is display only.
Position Status: This defaults to Approved but can be changed if necessary. Valid Values are: Approved, Frozen, Proposed. Typically, you will not need to change this at the creation of a new position.
Status Date: This also defaults to the current date, but should be overridden to equal the effective date.
Key Position: Not used by the CSU.
Business Unit: This should default to HW001. If it does not, enter it.
Job Code: Enter the job code for the position you are creating. If you do not know the code, use the search button to look it up. Numerous values will populate once you select the job code: Manager Level, Reg/Temp, Union Code, Title, Short Title.
Manager Level: Not used by the CSU.
Reg/Temp: This value can be changed if appropriate.
Full/Part Time: This value can be changed if appropriate. It defaults to Full-Time for all positions.
Regular Shift: Not used by the CSU.
Union Code: This should not be changed. It indicates which bargaining unit the position belongs to.
Title: This can be overridden if appropriate.
Short Title: This can be overridden if appropriate.

The page might look something like this after the Job Code has been keyed in.
The page might look something like this after the Title and Short Title have been overridden.

The bottom half of the page contains additional information; some that defaults based on the Job Code, and some that must be entered or overridden.

Field Definitions and Actions to be Taken

**Reg Region:** This should default to USA. If it does not, enter it.

**Department:** Enter the department in which the position belongs. If you are unsure of the DeptID, use the search button to find it. Once the DeptID is keyed in, the **Company** and **Location** information will be populated.

**Company:** This will always be HAY and should not be overridden.

**Location:** This will default based on the department table setup. It can be overridden if appropriate.

**Reports To:** Enter the position to which this position reports. This data is currently used for absence approvals.

**Dot-Line:** Not used by CSUEB.

**Supervisor Lvl:** Not used by CSUEB.

**Salary Plan Information:** This will default based on the job code selected. Pay close attention to the **Grade** and **Step** fields as you will need to override them in some cases.

**FLSA Status:** This will default based on the job code selected and may need to be overridden in some cases.

**Bargaining Unit:** Not used by the CSU.
The page might look something like this after all elements are filled in.

Note: The Grade was overridden and is different from what originally defaulted in.

Navigate to the Specific Information page.

3. You will need to open the Education and Government section to complete this page.

Field Definitions and Actions to be Taken

**Job Profile ID:** Not used by the CSU.

**Max Head Count:** Most positions are single-incumbent, but if you are creating a multi-incumbent position, change this value as appropriate.

**Mail Drop ID:** Not used by CSUEB.

**Work Phone:** Not used by CSUEB.

**Health Certificate:** Not used by the CSU.

**Signature Authority:** Not used by the CSU.

**Update Incumbents:** This is not used during the position creation process.

**Budgeted Position:** Check this box if this position is budgeted.

**Confidential Position:** Not used by the CSU.

**Job Sharing Permitted:** Not used by the CSU.

**Position Pool ID:** If the funding for the position will be done at the pool level, as most funding is, select the appropriate position pool ID.

**Pre-Encumbrance Indicator:** Not used by the CSU.

**Calc Group (Flex Service):** Not used by the CSU.
**Encumber Salary Option:** Not used by the CSU.

**Academic Rank:** Not used by CSUEB.

**Classified Indicator:** Not used by the CSU.

**FTE:** Enter the FTE for the position. This value will default on Job data when the incumbent is hired.

**Adds to FTE Actual Count:** Not used by CSUEB.

The page might look something like this when all elements are filled in.

Navigate to the Budget and Incumbents page

*Note: This page will NOT be used during the position creation process. It can be skipped during normal processing.*
Navigate to the CSU Position Data page

Field Definitions and Actions to be Taken

Position Number, Headcount Status and Current Head Count are displayed.
Effective Date: This is displayed based on the effective date keyed on the first page.
Unit: Enter the CSU/Check Sort Unit associated with this position.
Primary Fund: Enter the Primary Fund associated with this position.
MPP Job Family Code/Job Function/Reporting Category: If the position you are creating is in an MPP job code, you must key the appropriate MPP Job information here. You will not be able to save an MPP position without this information.

For a non-MPP position, this page will look something like this.

4. Click the Save button to generate a Position Number and save the data
Once saved, the Position Number populates and the Current Head Count changes based on what you keyed as the Max Head Count.
Create a New Position using the Initialize Function

Navigate to Add/Update Position Info > Organizational Development > Position Management > Maintain Positions/ Budgets > Add/Update Position Info

The Add/Update Position Info search page displays.

1. Click the Add a New Value tab

The Add/Update Position Info Add a New Value page displays.

The Position Number defaults to 8 zeros. Do not change this.

2. Click Add
The Description page displays.

3. Push the Initialize button

The Default Position Data page displays.

4. Enter the position number from which you wish to default information

5. Once the position number is entered, click OK

The Description page displays with the information from the position you entered.

6. Override data as appropriate
A changed page might look something like this.

*Note: The Effective Date, Status Date and Title were changed.*

Navigate to the Specific Information page.

7. Override data as appropriate

8. Notice that you will have to enter the Position Pool ID if you choose to fund at this level, regardless of how the default position was setup.

Navigate to the CSU Position Data page

9. Override data as appropriate

10. Click Save once all information has been updated to generate a position number.
Whom to Contact for Help?
For additional help or to report problems with this functionality, please log a ticket via the Service Desk (http://www.csueastbay.edu/servicedesk).