Position Management Training

November 2012
Today’s Objectives

- Understand Position Management
- Manage Hires Using Positions
- Add an Academic Employment Instance Using Position
- Create a TAM Job Posting for a Position
- Create a New Position
- Update Filled Positions
- Perform a Job Reclassification
CONCEPTS

What is Position Management?

Position Attributes and Relationships

The Position Management Process

TASKS

Workforce Administration

Creating New Positions

Update Employee’s Position Information
What is Position Management?

The roof to the right represents a department. The figures represent people in the department.

- How many people are in this department?
- How many vacant positions are there?
What is Position Management?

Let’s have these people take their seats. The chairs represent all the positions in this department.

- How many people are in this department?
- How many vacant positions are there?
Using Position Management

What is Position Management?

Position Management tracks positions by assigning them position numbers.

A person holding a position is an Incumbent.
What is Position Management?

- A new module within the Human Capital Management (HCM) system
- The framework to manage all positions in one central location
  - Filled, vacant, active, or inactive
- A tool for making more informed Human Resources and Budgeting decisions
- Coordinates 3 components:

  **Position:**
  A job independent of an employee

  ![Position Icon]

  **Person:**
  An employee

  ![Person Icon]

  **Job:**
  The union of a position and person

  ![Job Icon]

  Administrative Assistant II

  “Chris”

  “Chris” having the position of Administrative Assistant II
What is changing and what is staying the same?

With Position Management, a job is a union of the Person and a Position.

**Current**

- **Job:** "Chris" Administrative Assistant II
  - A **Job** cannot exist without a **Person**
  - No Vacant Positions can be tracked in HCM

**Future**

- **Position:** Administrative Assistant II
  - **Person:** "Chris," an employee
  - A **Job** cannot exist without a **Position** and a **Person**
  - A **Position** can exist without a **Job** or a **Person** (a **Vacancy**)

- **Job:** The union of a position and person
How is Position Data Different from Job Data?

Where we used to have only Job Data, we now use Job Data and Position Data.

**Current**

- **Job Data**
  - Job Code
  - Location
  - Standard Hours

- Salary
- FTE
- Pay schedule
- Funding Chartstring

**Future**

- **Position Data**
  - Job Code
  - Location
  - Standard Hours
  - Position Number (NEW!)
  - Headcount (NEW!)
  - Position FTE (NEW!)
  - Budgeting Chartstring (NEW!)

- **Job Data**
  - Salary
  - Job FTE
  - Pay Schedule
  - Funding Chartstring
  - Position Number (NEW!)
Benefits of Position Management

- Single, **central repository** for **ALL** UC Berkeley institution approved positions across all fund types/sources
  - Track all positions
  - Identify vacancies
  - View historic position data
- Provide Position and Position Funding data for **reporting**
- Reduction or **elimination of redundant data entry** in Budget, HCM, and ancillary systems
- **Building a bridge** between Human Resources and Budgeting
Position Management – A Review

- A **position** is a job in the organization, independent of any particular employee.
- When an employee (incumbent) leaves a position, the **position remains** (vacancy) to be filled again.
- Employees in a **position share the following attributes**: Business Unit, Job Code, Department, Reports To, FTE, and Position Funding.
- An employee in a **job has specific attributes**: Salary, Pay Schedule, and Payroll Funding.

**Position**: A job independent of an employee

**Person**: An employee

**Job**: The union of a position and person
Summary of Changes

- **Similar** to current WFA work procedures
  - Position number is required to hire a person in WFA
  - Position number is recommended to post a position in TAM, or may be required by your department

- **Some new terminology**

- **Funding chartstring(s) will exist in position data and job data**
  - Position chartstring: chartstring for budgeting (on-going)
  - Job chartstring: chartstring for payroll (change to in-year funding)
A Change in Relationships

When Position Management goes live, all active jobs will be converted to positions at a 1:1 ratio.
A position can have multiple incumbents.
When could this be useful?

A position’s Headcount indicates the planned maximum number of incumbents for a position.
Position Attributes

Navigation in HCM for Position Management:
Positions are created and viewed from the **Add/Update Position** page in the Position Management module.

**Required fields:**

- **Effective Date**
- **Reason** (Reason Code)
- **Job Code**
- **Department**
- **Location**
- **LVL 7 Dept (Dept ID)**
- **Standard Hours**
Use the **Position Funding** tab to enter the funding chartstrings:

- **The Effective Date** (populated from the effective date on the Description tab)
- **GL Business Unit**
- **Account** is filled in from Job Code
- **Fund**
- **DeptID**
- **Program**
- **Chartfields 1-2** (optional)
- **Distrb %**
- **ERNCD**
Viewing a Position

Viewing a Position
1. Enter approved positions in HCM which automatically creates a Position Number

2. Create job postings for vacant positions in TAM using the Position Number

3. Hire a person by entering a Position Number in the Job Data page
   - Automatically pulls position and funding data into the employee record

4. Some updates made to Position Data automatically flow to Workforce Administration Job Data
   - Updates to position funding data are not automatically pushed to a person’s job data (Explained in detail later)
Where does Position Management fit in our current process?

1. **Create Position and Enter Position Data**
   - HCM

2. **Enter Budgeted Funding Data in Position Data**
   - HCM

3. **Submit PAWS Ticket, or other Dept request (Include Position Number)**
   - YES

4. **Create Job Posting in TAM**
   - HCM

5. **Hire Person into Job (Include Position Number)**
   - HCM

6. **Enter Position Number in Job Data**
   - HCM

7. **Enter Additional Job Data and Other Funding**
   - HCM

8. **Incumbent Created**
Most Common Position Management Actions

Day-to-Day Operations

- Hire a person into a position
- Rehire, Transfer, Promotion, Additional Jobs, Reappointments, etc. using Position
- Enter a termination, creating a position vacancy
- Update Job Data chartstring (change from budgeted)
- Update a Job Data Supervisor ID
- Reclassify a position

Transitional Actions Due to Conversion

- Update a position’s Reports To Position Number
- Update a position’s Level 7 Dept (DeptID)
In this section, we will cover the following topics:

- New Hire from a TAM Posting
- Add an Academic POI (Person of Interest) as an Employment Instance
- Rehire a Former Employee
- Transfer an employee into a department
Hiring a New Employee

Similar to our current process, begin by entering personal information.

- Enter personal information
- Date of Birth: 01/15/1977
- Effective Date: 10/03/2012
- Gender: Female
- Marital Status: Unknown
- Highest Education Level: Bachelor's Level Degree
- Student Status: 1-Not Registered
- Social Security Number: 555-24-9000

Person ID: NEW
When hiring, entering the Position Number links a person to a job and populates Job Data with Position Data.
Hiring a New Employee

The **Reports To Position Number** displays if entered on Position.

The **Supervisor ID** field will be populated from the employee’s position if two conditions are met:
1. This position’s **Reports To** field was completed.
2. The position indicated in the **Reports To** field has an incumbent.
Hiring a New Employee

All chartstrings are populated from Position, but you must enter the Distrb %. 

![Job Earnings Distribution Form]

- Effective Date: 11/01/2012
- Standard Hours: 40.00
- Pay Rate/Amount: 3,760.000000
- Work Period: W
- Comp Freq: Monthly
- FTE: 1.000000
- Job Category: 
- Begin Date: 11/01/2012
- End Date: 11/01/2012
- Earn Code: REG
- Pay Rate/Amount: 3766.000000
- Speed Type: 
- GL BU: 1
- Fund: 19900
- Dept: 13050
- Program: 40
- Chartfield 1: 
- Chartfield 2: 

**Job Data**  **Employment Data**  **Earnings Distribution**

[OK]  [Cancel]  [Apply]  [Refresh]
Hands On - Managing Hires: New Hire from TAM Job Posting
Hire Rebecca WellsXXX into Position 00000698
To add an employment instance with Position Number to an academic POI, you begin with the **Person Organizational Summary** link.
Demo - Add an Academic Employment Instance
Hire Elisabeth BurgessXXX into Position 00000699
Create a TAM Staff Job Posting

Enter the Position Number to create a TAM job posting

**Enter Primary Job Opening Information**

<table>
<thead>
<tr>
<th>Opening Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Opening Type:</strong></td>
<td>Standard Requisition</td>
</tr>
<tr>
<td><strong>Business Unit:</strong></td>
<td>All Berkeley Campus</td>
</tr>
<tr>
<td><strong>Position Number:</strong></td>
<td>00004944</td>
</tr>
<tr>
<td><strong>Job Code:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Posting Title:</strong></td>
<td>Administrative Asst 3</td>
</tr>
</tbody>
</table>

Continue
Create a TAM Staff Job Posting

A Position Number is:
- **Recommended** but not required for creating a TAM posting
- **Required** to hire a person into a job

**Enter Primary Job Opening Information**

<table>
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<tr>
<td><strong>Job Opening Type:</strong></td>
</tr>
<tr>
<td><strong>Business Unit:</strong></td>
</tr>
<tr>
<td><strong>Position Number:</strong></td>
</tr>
<tr>
<td><strong>Job Code:</strong></td>
</tr>
<tr>
<td><strong>Posting Title:</strong></td>
</tr>
</tbody>
</table>

**Message from webpage**

Warning (20000,907)

This Job Code requires a Position Number at the time of Hire. Please enter the Position Number for the Job Posting, if available.
Demo - Managing Hires: Create a TAM Posting
Post Job for Position 00000464
Transfer into a Department

Transfers will require position number.

Manage Hires Details Page

Job Data
Transfer into a Department

Hands On- Transfers: Into Department
Managing Positions

In this section, we will cover the following topics:

- Adding New Positions
- Updating Existing Positions
Adding a Position

Position Management – Description page

- Position Information
- Job Information
- Work Location
- Salary Plan Information
Adding a Position

The Position Effective Date must be on or before the hire date.
Adding a Position

When the Job Code is entered, data populate from the Job Code table.
Adding a Position

The **Work Location** section contains fields that are required, recommended, and a few fields not currently used.
Adding a Position

In the **Salary Plan Information** section, when the **Standard Hours** are changed the **FTE** recalculates.

**Note:** The weekday fields are a helpful guide for calculation purposes only. This will not impact payroll or CalTime.
Adding a Position

Enter the funding chartstring(s) for the position.
Creating a Position
Updating Positions

- When making changes to Position Data or Job Data, ask yourself these helpful questions:
  - Is this an on-going change or a temporary salary change?
  - Does the change impact the position or a specific person’s job?

If it is an on-going change, change at the position.
In-year change, change at the Job Data.
Updating Positions

- Changes to Position Data that automatically flow to Job Data:

- Changes to Position that require further action in Job Data:
  - Updating a Position’s Funding
  - Performing a Job Reclassification
Position Updates to Job Data

Whether you make position changes that automatically update Job Data or not, the first step is the same in both cases.

In **Add/Update Position**, begin by creating a new position row.

<table>
<thead>
<tr>
<th>Description</th>
<th>Specific Information</th>
<th>Budget and Incumbents</th>
<th>Position Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Information</td>
<td>00005120</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Headcount Status:</td>
<td>Filled</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Effective Date:</strong></td>
<td>10/02/2012</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Reason:</strong></td>
<td>Position Data Update</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Head Count:</td>
<td>1 out of 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Status:</strong></td>
<td>Active</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Action Date:</td>
<td>10/02/2012</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Status Date:</strong></td>
<td>08/13/2012</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Position Status:</strong></td>
<td>Approved</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Unit:</td>
<td>UCBAL All Berkeley Campus</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Code:</td>
<td>7302U Systems Administrator 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager Level:</td>
<td>All Other Positions</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Automatic Update: Position to Job Data

Updating a Filled Position
Job Reclassification

When performing a **Job Reclassification** (changing the associated job code on a filled Position), you must update the employee’s Job Data to complete the update.

**Add/Update Position**

**Job Data**

![Diagram of Add/Update Position and Job Data forms with arrows pointing to various fields, such as Position Number, Headcount Status, Effective Date, and Job Code.](current_image-url)
Job Reclassification (using same Position)
Funding Updates to Job Data

A change to the **Position Funding**, as illustrated below, requires you to update the employee’s Job Data to complete the update.

![Diagram of Job Data update process]

Update an Employee’s position information
Funding Updates to Job Data

Updating Position Funding
Access to Training Resources

**Training materials:** [http://hrweb.berkeley.edu/hcm](http://hrweb.berkeley.edu/hcm)
- Online tutorials
- Online Self-Assessment
- Training Manual
- Job Aids or Quick Reference Guides

**Further Assistance:**
- Drop-in Lab Sessions Post-Go Live through December and January
- Send your questions to: positionmanagement@berkeley.edu
- WFA Transactional Assistance: hrmshelp@berkeley.edu
Forum Complete

Congratulations, you have completed Position Management training!