
“Override Position Data” Button

Clicking the Override Position Data button in Job Data:

- 1) Opens the Department, Location, and Job Code fields, allowing a user to manually change them.
- 2) Bypasses the rule that Job FTE cannot be greater than Position FTE.
- 3) Disconnects the automatic update function, so position updates to Department, Location, or Reports To do not auto-insert a row in the incumbent’s job record.

Ordinarily, users should not need to override position data, because job data should almost always match position data. When employees are rehired, reappointed, or transferred into another department, it is important to enter a new Position Number for the job in the new department. Do not leave the number copied from the previous row and override position data to manually change Department and/or Job Code, instead of entering a new Position Number or updating the existing position and pulling the updates into job data.

It is not necessary to override position data in order to update job earnings distributions, Supervisor ID, Compensation, or Job FTE to less than or equal to Position FTE. If your department has chosen to create multiple headcount positions with incumbents who report to different Supervisors (such as for Student, GSI, GSR, and Lecturer positions), you can manually update Supervisor ID in incumbents’ job records without overriding position data.

Avoid clicking the Override Position Data button unnecessarily, because overriding position data disconnects the incumbent from the automatic update function. If you do not want an update to Department, Location, or Reports To on the position to auto-insert a row in Job Data, uncheck the Update Incumbents checkbox located on the Specific Information tab. Keep in mind that position updates to Department, Location, or Reports To will flow to all incumbents unless you have unchecked the Update Incumbents checkbox or clicked Override Position Data on the incumbent.

Using Position Override

Following are some examples where it may be appropriate within UCB’s business and system processes to override position data:

Ex. 1: A department has a multiple headcount position, but one incumbent works at a different Location. Overriding position data enables the department to change the Location on that incumbent’s job record only.

Ex. 2: The incumbent has a 50% annual appointment, but works only ½ the year at 100% time. Overriding position data enables the department to maintain the position at 20 standard hours (.50) FTE annually, but increase the employee’s Job FTE to 1.0 when needed.

Ex. 3: For some Temporary Job Reclassifications, and in consultation with Human Resources and Budget, it may be appropriate to maintain the position with the regular Job Code and override position data to update the incumbent’s Job Code during the temporary reclassification period.

Ex. 4: To update Job Code, Department, Location, and Reports To from position, but not FTE or funding distributions, click the Override/Use button TWICE (to 'override' and then 'use' Position data). This technique is useful for Job Reclassifications, Academic Promotions, and Salary Range Adjustments, where Job Code and/or salary range updates are needed, but existing Job FTE and earnings distributions can be maintained.

How to Correct Job Data Records with "Override Position Data" Activated

Case A: If Department, Location and Job Code match the position, and Job FTE is not greater than Position FTE:

- 1) Insert a new row in Job Data.
- 2) Effective Date the row back to the earliest date possible (does not need to be sequence 0).
- 3) Select Action: Budgeted Position Change, Reason: Use Position Data.
- 4) Click the 'Use Position Data' button, which will change to 'Override Position Data'.
- 5) Verify the data on each screen, especially Supervisor ID, FTE, Compensation, and Distribution Begin/End dates, and update or complete any data as needed.
- 6) Save the record.

Case B: If Department, Location or Job Code has been changed in Job Data, or Job FTE is greater than Position FTE, decide whether to update the existing position, or use a different position. If the Position Number belongs to another department, you **MUST** change to a position belonging to your department.

B1: To change to a different position:

- 1) Insert a new row in Job Data.
- 2) Effective Date the row back to the earliest date possible (does not need to be sequence 0).
- 3) Select Action: Budgeted Position Change, Reason: Change Position Number.
- 4) Enter the Position Number and tab out (the 'Use Position Data' button will change to 'Override Position Data' – DO NOT click it now).
- 5) Verify the data on each screen, especially Supervisor ID, FTE, Compensation, and Distribution Begin/End dates, and update or complete any data as needed.
- 6) Save the record.

B2: To update the position data and then pull the updates into Job Data on the same Position Number:

- 1) Insert a new row in Position Data.
 - 2) Effective Date the row back to the earliest date possible/appropriate.
 - 3) Choose an appropriate Reason Code for the Position update.
 - 4) Make the update and save.
 - 5) Insert a new row in Job Data.
 - 6) Effective Date the row back to the earliest date possible (does not need to be sequence 0).
 - 7) Select Action: Budgeted Position Change, Reason: Use Position Data.
 - 8) Click the 'Use Position Data' button, which will change to 'Override Position Data'.
 - 9) Verify the data on each screen, especially Supervisor ID, FTE, Compensation, and Distribution Begin/End dates, and update or complete any data as needed.
 - 10) Save the record.
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