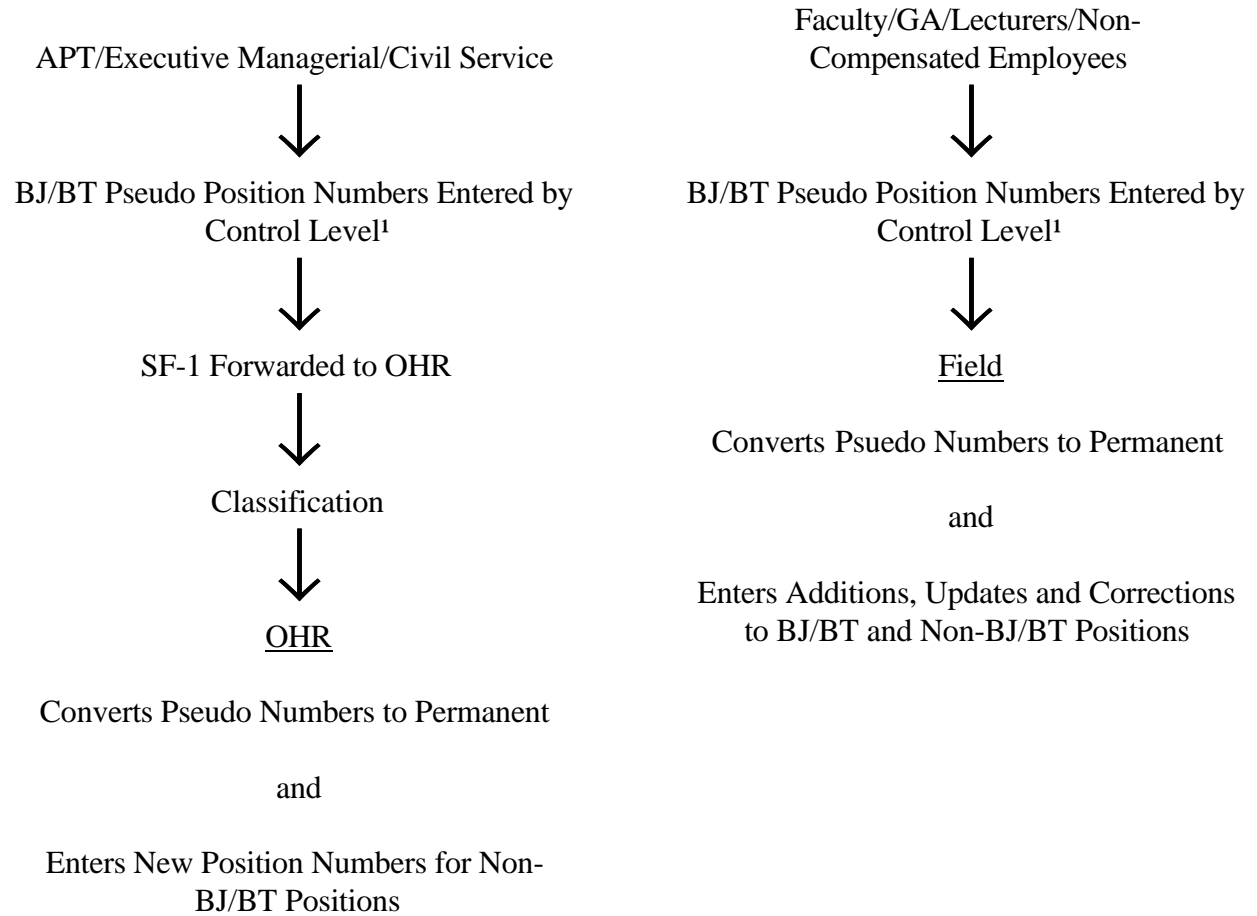


PeopleSoft
Human Resources

Budget / Position Control

Prepared by the University Budget Office
March 13, 1998

POSITION CONTROL/FLOW CHART
PeopleSoft



¹Control Level - All new appropriated positions with pseudo numbers inputted by Manoa Budget, UH Hilo, UH West Oahu, CC Administration, Systemwide Support

ACCESSING THE POSITION DATA PANELS

After logging on and from the Manage Position panel, select Use. From the pull down menu, select Position Data. A choice of five position data panels will appear. Within each panel you have the following options : Add, Update/Display, Update/Display All and Correction (You may also use the icons located on the Tool Button menu bar).

After making your selection, enter the position number of the record you want to add or access. Position numbers are to be entered with two zeros preceding the five digit number.

Example: 0089999T for temporary position number 89999T

COMPLETING THE POSITION DATA 1 PANEL

FIELD	INSTRUCTIONS
Effective Date	<p>Enter the date the position action takes effect (defaulted to the current date). The date must be entered in the following format:</p> <p>MM/DD/CCYY</p> <p>Example: 07/01/1998</p> <p>Required Field</p>
Department	<p>Use the pull down box to select your department code or you may enter it manually into the field.</p> <p>Required Field</p>
Job Code	<p>Use the pull down box to select the position's job code or you may enter it manually into the field.</p> <p>Required Field</p>
Position Status	<p>Use the pull down box to select either Approved, Frozen or Proposed.</p> <p>Required Field</p>
Action Reason	<p>Use the pull down box to make a selection. Please note that "Establish Position" (EST) is not used when creating a new position. Instead, use "New Position" (NEW). EST is a carryover term from HRIS and appears in PeopleSoft only when viewing historical data.</p> <p>Required Field</p>
Title	<p>Based upon your Job Code selection, this field is inputted automatically.</p> <p>Required Field</p>

COMPLETING THE POSITION DATA 1 PANEL

FIELD	INSTRUCTIONS
Status	Select either Active or Inactive. Optional Field
Unit Code	Use the pull down box to select the appropriate unit code. Optional Field
Status Date	Reflect the date that the position status was changed in the following format: MM/DD/CCYY Example: 06/30/1998 Optional Field
NTE Date	Enter the Not to Exceed Date of the position in the following format: MM/DD/CCYY Example: 07/01/1998 Required Field
Reports to Posn	Enter the position number of the person the position will be reporting to. The position number is to be entered with two zeros preceding the five digit number. Example: 0087654 for position number 87654

COMPLETING THE POSITION DATA 2 PANEL

FIELD	INSTRUCTIONS
Company	Defaulted to BOR for Board of Regents. Required Field
Pay Group	Use the pull down box to make a selection. Required Field
Employee Type	Defaulted to S (Salaried). Required Field
Location Code	Use the pull down box to make a selection. Required Field
Island Code	Use the pull down box to select the island location of the position. Optional Field
Union Code	Use the pull down box to select the bargaining unit of the position or you may enter the two digit BU number manually into the field. Required Field

COMPLETING THE POSITION DATA 3 PANEL

Optional Fields

FIELD	INSTRUCTIONS
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Max Head Count

Enter the maximum head count of employees that may fill this position.

Optional Field

Position FTE

Enter the full-time equivalent of the position.

Optional Field

Regular/Temporary

Select Regular for permanent positions, Temporary for non-permanent positions.

Optional Field

Budgeted Position

Remove "x" from box if the position is *not* an appropriated BJ or BT position.

Completion of Position Data 4 panel not required if the position is not appropriated.

Optional Field

Confidential Position

Not being used at this time.

Job Sharing Permitted

Not being used at this time.

COMPLETING THE POSITION DATA 4 PANEL

FIELD	INSTRUCTIONS
UOH Code	Use the pull down box to select the UOH Code of the position or you may enter the three digit code manually into the field. Required Field
Org Code	Based upon your selection of UOH Code, this field is inputted automatically. Required Field
MOF	Use the pull down box to select the Means of Financing of the position or you may enter the one letter designation manually into the field. Example: A (for General Funds), W (for Revolving Funds) Required Field
BD tp	Use the pull down box to select either J1 or T1 to designate that the position is an appropriated permanent or temporary position listed in either the BJ-1 or BT-1 tables. Required Field
Account Code	Enter the 14 digit FMIS account code for the position. Example: G 98 024 F 999 B 999 (no spaces) Required Field
GL/Type	Defaulted to BASER. Informational Field
Percent of Distribution	Enter the percentage of the position's FTE designated to the FMIS account code identified above.
NTE Date	Enter the Not to Exceed Date of the position in the following format: MM/DD/YY

COMPLETING THE POSITION DATA 5 PANEL

The Position Data 5 panel is used only when establishing BJ and BT pseudo numbered positions. In such cases, the pseudo number needs to be switched with the permanent position number.

While in the Update/Display or Correction mode, call up the pseudo number that is being established. Insert a new row of data on the Position Data 1 panel to change the Effective Date, Status Date, and the Action Reason to UPD for Update Position. Review the rest of the information reflected on the Position Data 1 panel as well as those on 2, 3, and 4 and make any necessary changes.

Call up the Position Data 5 panel. Enter the permanent position number in the Pseudo Num field. Click on the Switch Pseudo button to swap the position numbers.

Save changes by pressing enter or by clicking on the File Save icon on the menu bar.

EXERCISES

Exercise #1

ADDING A TEMPORARY FACULTY POSITION (NON-BJ/BT-1 POSITION)

Click on the “Add” icon and enter the position number of the non-BT-1 temporary position that you want to add.

Fill in the fields on the Position Data 1 panel as applicable.

Click on the “Next Panel in Group” icon (or press F2) and fill in the fields on the Position Data 2 panel.

Click on the “Next Panel in Group” icon (or press F2) and fill in the fields on the Position Data 3 panel.

Note: Since this is a Non-BJ/BT-1 position, you need to make sure the “Budgeted Position” box at the lower left is *not* checked in.

Click on the “Next Panel in Group” icon (or press F2). Note that since this was not an appropriated BJ/BT-1 position, there are no fields to input on the Position Data 4 screen.

Click on the “Next Panel in Group” icon (or press F2). There are no fields to fill in on the Position Data 5 screen in this instance.

Click on the “Next Panel in Group” icon (or press F2) to return to the Position Data 1 panel and save the new position data by clicking on the “Save” icon (or press Enter).

EXERCISES

Exercise #2

CHANGING THE POSITION TITLE FOR A FACULTY POSITION

Click on the “Update” icon and enter the position number of the faculty position you want to reclassify.

Insert a new row of data on the Position Data 1 panel. This will also create updated rows of data on the other Position Data panels. Change the Effective Date, Job Code, Status Date, and Action Reason as applicable.

Click on the “Next Panel in Group” icon (or press F2) to update the fields on the remaining Position Data panels.

Save the new position data by clicking on the “Save” icon (or press Enter).

To review the history of this position, use the scroll bar located along the right side of the Position Data panels.