

CAPPS Position Management

Welcome to CAPPS HR/PAYROLL End-User Training (EUT)

Position Management

Course Number: 120

Before taking this class, you should have already completed the CAPPS Fundamentals course.

Introductions

Before proceeding with the course, let's take some time to get to know each other.

Tell us:

- Your name
- Your Agency and Department
- Your expectations from this session
- An interesting fact about yourself

Greetings

Before we get started, let's go over some housekeeping rules, along with a few pointers and tips that will help you complete this course.

Housekeeping Rules

- Training Materials
- Restrooms
- Emergency Exits
- Please Silence Cell Phones
- Ask Questions

Course Preparation

Pointers and tips to remember while taking this course:

- This course will take approximately 3 hours. This course may be completed in sections, or all in one session.
- Make sure you view all the information using the Next and Prev navigation buttons.
- Close all other applications including email while taking the course.

- When you see this symbol move your mouse over the symbol to view content “Fun Facts”.
- After successfully completing the course, there will be instructions on how to complete a Knowledge Check.

Course Outline

Understand how to use CAPPS Position Management to perform the following tasks:

- Section 1 - Manage Positions
- Section 2 - Process a Position Change Request
- Section 3 - Position Workflow
- Section 4 - Reports & Queries
- Section 5 - Review

Course Objectives

After completing this course, you will be able to:

- Describe the Position Management Process
- Understand how to manage and update positions
- Run CAPPS Position Management reports and queries

Section 1 - Manage Positions

Section 1 – Objectives

- Understand the relationship between CAPPS modules
- Learn the key benefits for Position Management (PM)
- Understand key terms and definitions
- Learn the process of managing positions
- Understand the Position Management data flow
- Learn how to add, update and maintain position data
- Understand where to update position data
- Learn the difference between incumbent and position data
- Learn how to view incumbent data and position history

CAPPS HR/Payroll Modules Integration

The CAPPS HR/Payroll is comprised of several integrated applications known as modules. These modules are used to manage employee and human resource functions.

The central module in this integration is Human Resources. The Human Resources module contains key personal and job-related information that is shared by the other modules within CAPPS. The additional core modules include Position Management, Time and Labor, Payroll and an interface for Benefits Administration. The other modules that include integration but not necessarily considered core are: Recruiting, Learning and Performance Management.

The focus of this training is Position Management. CAPPS Position Management enables an agency to track details of a particular job, known as a position, whether the position is held by an employee or not. In this course, CAPPS' users will learn how to create, maintain and track position data, as well as, how to view incumbent information and history.

Key Benefits

Key benefits of CAPPS Position Management is the ability to:

- Create and track position data and history
- Process employee appointments by position
- Maintain incumbent data
- View incumbent and position history

Key Terms & Definitions

Company Code - The Company Code in CAPPS is the Agency number.

Business Unit - The Business Unit is a business level between company and departments that identify divisions for reporting and operations. Business Unit values may include the agency number suffixed with two additional characters. (ex. 30400)

Position - CAPPS Human Resources system is structure by position. The position is used to track details on a particular job in a particular department or location that usually has a one-to-one relationship with employees.

Position Number - A unique auto-assigned number given to a position.

Position Data - Position data is any information related to a specific position such as Job Code, Department ID, Salary Plan or Title.

Job Code - Job codes are different from positions: Within a single job code, there can be a number of positions. Positions usually have a one-to-one relationship with employees.

Functional Job Code - The approved job codes for the State of Texas as specified by the State Auditor are maintained in CAPPs. The Functional Job Code is a combination of the approved statewide four (4) character job code and a two (2) character suffix that is defined by the agency. (i.e. 0055XX where XX is the agency specific values).

Reports-To - This is used to establish reporting relationships among positions. The Reports To field may be used to generate organizational reports.

Incumbent Data - After an employee has been assigned a position, the employee ID, Name and a Job Data link is displayed as Incumbent Data in Position Management. The position headcount adjusts when an employee has been assigned to a position, however, any changes to the incumbents job record will only affect the employee's job record and not the position.

Cloning (aka Initialize) - Copies all or many of the characteristics of a similar existing position. There is a button that appears only when adding a new position. When this button is clicked, a dialog box prompts for the position number of the position to copy. Any information that doesn't apply to the new position can be manually changed. Note: This button appears only when adding a new position.

Position Management Data Flow

When new positions are created, Human Resources uses data that is entered in the Department Table, Job Code Table, and Location Table and inserts the default values in several position data fields.

These defaults may be overridden when needed to enter exceptions for a particular position.

When Human Resources assigns a position to an employee, CAPPs Position Management passes this defaulted data to the employees Job Data record.

The Position Data and Job Data records are kept in sync to maintain the integrity of the employee's record, as needed. This synchronization is supported by the POS User and HR User.

Section 1 - Lesson Outline

- Add a Position 10 min
- Search for a Position 10 min
- Update a Position 10 min
- Maintain a Position 10 min
- Clone a Position 10 min

Section 1, Lesson 1

Add a Position

- The Position Management process enables an Agency to set up position data in advance regardless of whether an employee is assigned to it.
- Prior to creating a new position, there must be an active Functional Job Code and Department ID in CAPPS.

Section 1, Lesson 1 Exercise

Exercise:

The following exercise provides step-by-step instructions on how to perform the following task in CAPPS:

Add a Position

Scenario: Creating a New Position

[View Section 1, Lesson 1 exercise scenario \(opens a new web browser\).](#)

After completing the exercise, close the browser tab and return to the course.

Section 1, Lesson 2

Search for a Position

- CAPPS Position Management provides the ability to search for a position by key information such as functional Job Code, Position Status and Reports To position.
- Search for an existing position to view or update.

Section 1, Lesson 2 Exercise

Exercise:

The following exercise provides step-by-step instructions on how to perform the following task in CAPPS:

Search for a Position

Scenario: Searching for a Position

[View Section 1, Lesson 2 exercise scenario \(opens a new web browser\).](#)

After completing the exercise, close the browser tab and return to the course.

Section 1, Lesson 3

Update a Position

- Position information may be updated with Job Code, Location, Department or Reports To changes.
- Understand the effective date as it relates to the ability to insert, delete or correct Position Data.
- Understand the process of a 'non-pay impacting' position data change and incumbent updates.

Section 1, Lesson 3 Exercise

Exercise:

The following exercise provides step-by-step instructions on how to perform the following task in CAPPS:

Update a Position

Scenario: Update an existing position with a 'non-pay impacting' data change

[View Section 1, Lesson 3 exercise scenario \(opens a new web browser\).](#)

After completing the exercise, close the browser tab and return to the course.
Maintain a Position

- Maintain consistency between Position and incumbent Job Data
- Understand the effect of the 'Update Incumbent' flag
- Understand the process of a 'pay impacting' Position Data change

Section 1, Lesson 4 Exercise

Exercise:

The following exercise provides step-by-step instructions on how to perform the following task in CAPPS:

Maintain Position

Scenario: Updating an existing position for 'pay impacting' change

[View Section 1, Lesson 4 exercise scenario \(opens a new web browser\).](#)

After completing the exercise, close the browser tab and return to the course.

Section 1, Lesson 5

Exercise

The following exercise provides step-by-step instructions on how to perform the following task in CAPPS:

Cloning a Position

Scenario: Create a new position that has the same job code, department and location as an existing position.

[View Section 1, Lesson 5 exercise scenario \(opens a new web browser\).](#)

After completing the exercise, close the browser tab and return to the course.

Section 2 - Process a Position Change Request

Section 2 - Objectives

- Learn how to make changes to current Position Data when entered incorrectly.
- Learn how to reclassify a position with a new Job Code.
- Understand the considerations needed in deciding where to make Position Data changes.

Section 2 – Outline

- Position Data Change 15 min
- Position Reclassification 15 min

Section 2, Lesson 1

Position Data Change

- Updating Position Data includes the ability to insert, delete or correct Position Data.
- This lesson will focus on how to delete or correct Position Data.

Section 2, Lesson 1 Exercise

Exercise:

The following exercise provides step-by-step instructions on how to perform the following task in CAPPS:

Position Data Change

Scenario: Updating and Correction Position Data

[Section 2, Lesson 1 exercise scenario \(opens a new web browser\).](#)

After completing the exercise, close the browser tab and return to the course.

Section 2, Lesson 2

Position Reclassification

- Position reclassification helps properly classify an employee's position or assignment based on the actual work the employee performs. Reclassifications can result in a move to a higher or lower salary group.
- This lesson focuses on the steps to reclassify a position and update the incumbents' job record linked to the position.

Section 2, Lesson 2 Exercise

Exercise:

The following exercise provides step-by-step instructions on how to perform the following task in CAPPS:

Position Reclassification

Scenario: Reclassifying a Position

[Section 2, Lesson 2 exercise scenario \(opens a new web browser\).](#)

After completing the exercise, close the browser tab and return to the course.

Section 3 - Position Workflow

Section 3 - Objectives

- Create reporting relationships among positions.
- Modify reporting relationships among positions.
- Understand the automated 'Reports To' process when a supervisory position is vacated for an employee or a non-employee.

Section 3, Lesson 1

Maintain 'Reports To' Relationship

- Understand how to maintain a reporting relationship among positions

Exercise

The following exercise provides step-by-step instructions on how to perform the following task in CAPPS:

Maintain Reports To Relationship

Scenario: Update the Reports To position on an existing position

[Section 3, Lesson 1 exercise scenario \(opens a new web browser\).](#)

After completing the exercise, close the browser tab and return to the course.

Section 4 - Reports & Queries

Section 4 - Outline

- Audit Exception Position Report 10 min
- All Agency Positions Query 10 min
- All Agency Vacant Positions Query 10 min

Section 4, Lesson 1

Audit Exception Positions Report

Exercise

The following exercise provides step-by-step instructions on how to perform the following task in CAPPS:

Reports and Queries

Scenario 1: Audit Exception Positions Report

[Section 4, Lesson 1 exercise scenario \(opens a new web browser\).](#)

After completing the exercise, close the browser tab and return to the course.

Section 4, Lesson 2

All Agency Positions Query

Exercise

The following exercise provides step-by-step instructions on how to perform the following task in CAPPS:

Reports and Queries

Scenario 2: All Agency Positions Query

[Section 4, Lesson 2 exercise scenario \(opens a new web browser\).](#)

After completing the exercise, close the browser tab and return to the course.

Section 4, Lesson 3

All Agency Vacant Positions Query

Exercise

The following exercise provides step-by-step instructions on how to perform the following task in CAPPS:

Reports and Queries

Scenario 3: All Agency Vacant Positions Query

[Section 4, Lesson 3 exercise scenario \(opens a new web browser\).](#)

After completing the exercise, close the browser tab and return to the course.

Section 5 - Review

Important Takeaways

- CAPPS Position Management (POS) business process helps you define Human Resources by position, rather than job or by employee.

- Position Management takes key information from the Department table and Job Code table to populate Position Data. This information must be active and valid in CAPPs prior to adding or updating a position.

There are two fundamental areas to consider when updating a position:

- 'Non-Pay Impacting' position-related data changes include Reports To, Department and Location changes. This will automatically insert a new effective dated row on the incumbents Job Data.
- 'Pay Impacting' position-related data changes include Job Code and compensation changes. In addition to changing this information on the Position Data pages, these changes must also be manually input on the incumbents Job Data. The effective date on both the updated Position Data and Job Data must be the same.
- Effective dates and sequence of data rows greatly affect how the system updates and maintains matching incumbent and position data.
- Communication between the HR User and POS User is critical in keeping an employee's Position Data and Job Data in sync. Each of these users are assigned specific security roles to reconcile the data.
- Caution should be taken when using the Correction mode to fix incorrect data. Correcting Position Data overwrites any previous information for that effective dated row and will impact the history of an employee's record.

Summary

- Congratulations, you have completed this course. You learned the following regarding CAPPs Position Management:
- How to describe the Position Management process in CAPPs.
- Understand how to manage and update positions.
- How to run Position Management reports and queries.

Conclusion

This completes the course.