

A banner with a blue and white abstract background featuring glowing circles and lines. The text is centered in a bold, dark blue font.

**CAPPS HR/PAYROLL**  
**End-User Training (EUT)**

**EUT Course - 120**  
**POSITION MANAGEMENT**

PeopleSoft 9.2

March, 2016

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## **Position Management**

The CAPPS HR/Payroll Position Management (POS) business process helps define Human Resources by position, rather than job or by employee.

With POS, you can:

- Create and track positions data and history.
- Process employee appointments by position.
- Maintain incumbent data.
- Budget for positions and departments.
- View incumbent, position, and budget histories.

### **Section 1 - Manage Positions**

#### **Add a Position**

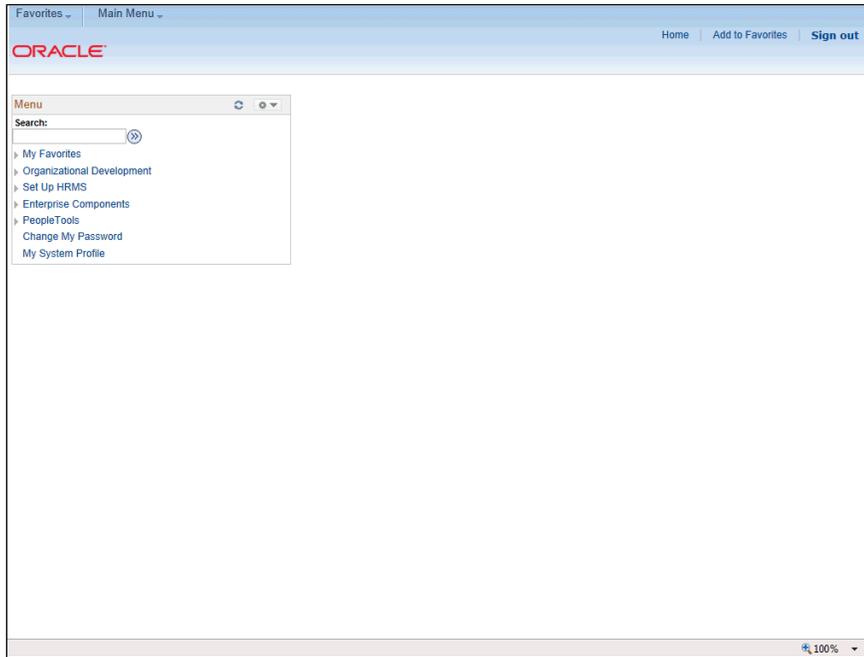
**Section 1, Lesson 1 Exercise - Scenario:** Add a New Position

#### **Procedure**

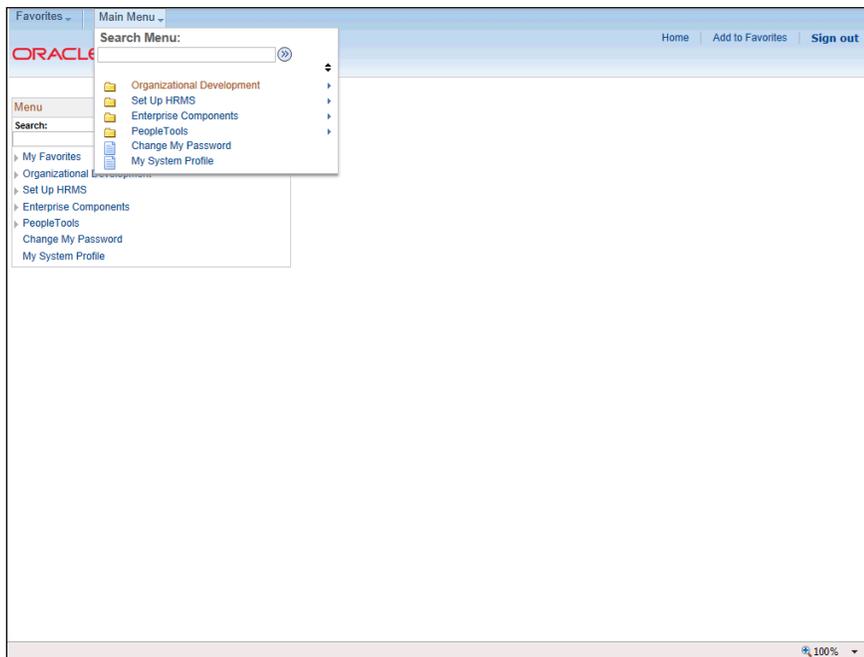
This lesson will focus on how to create a new position.

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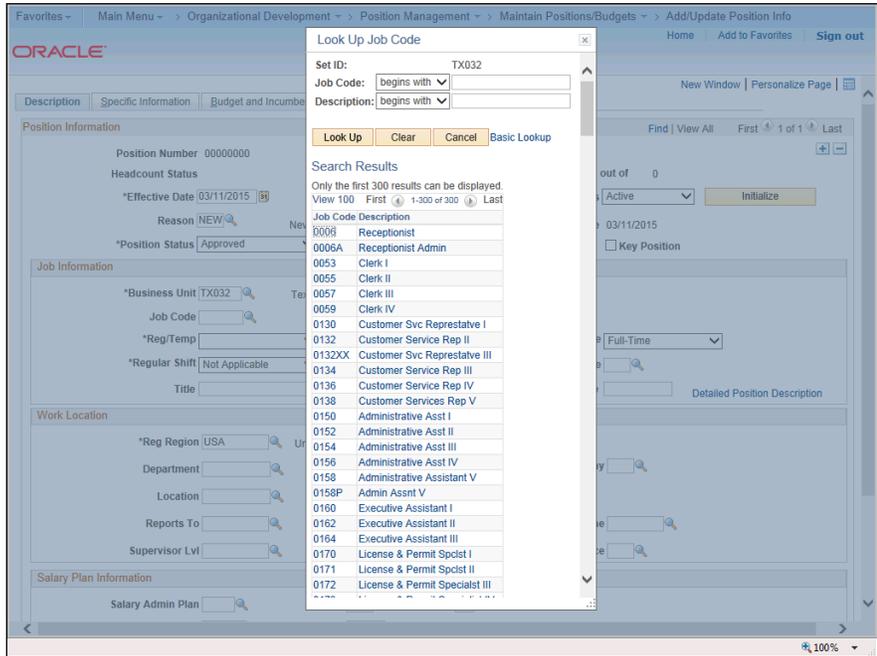


Step	Action
1.	Click the <b>Main Menu</b> link. 

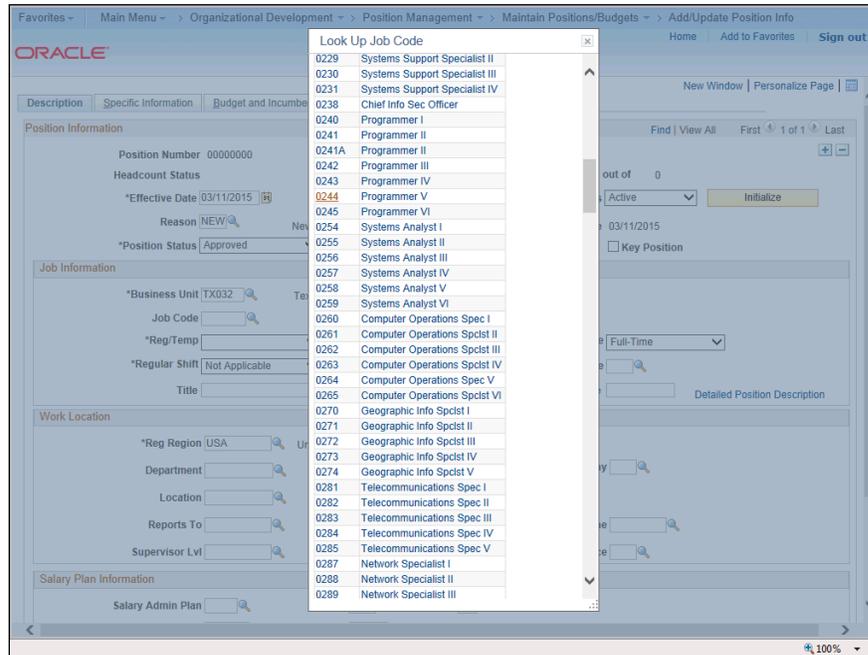


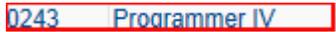
Step	Action
2.	Click the <b>Organizational Development</b> menu. 
3.	Click the <b>Position Management</b> menu. 
4.	Click the <b>Maintain Positions/Budgets</b> menu. 
5.	Click the <b>Add/Update Position Info</b> menu. 
6.	CAPPS Position Management displays the <b>Add/Update Position Info</b> page. This page is used to add new positions as well as search for existing position information.
7.	Click the <b>Add a New Value</b> tab. 
8.	Click the <b>Add</b> button. 
9.	The <b>Description</b> page is used to enter Position, Job, Work Location and Salary Plan information of a position.
10.	A key field to understand when adding position information is the <b>Effective Date</b> .  <b>Effective Dates</b> maintain a complete chronological history of data and tables, whether it has been changed two years ago or to go into effect in two months.  The <b>Effective Date</b> defaults to the system date which is the current date.
11.	When new positions are created, CAPPS uses information entered in the Department, Job Code, and Location Tables and inserts the default values in several position data fields.  Let's continue to add a new position by selecting a <b>Job Code</b> .
12.	When new positions are created, CAPPS uses information entered in the Department, Job Code, and Location Tables and inserts the default values in several position data fields. There are also pre-populated based on the CAPPS HR/Payroll standard configuration. These values may be changed to any of the available field options.  Let's continue to add a new position by selecting a <b>Job Code</b> .

Step	Action
13.	Click the <b>Look up Job Code</b> button. 



Step	Action
14.	Click the scroll bar.

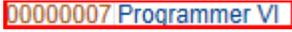
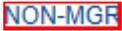


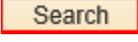
Step	Action
15.	Click the <b>0243 - Programmer IV</b> link. 
16.	Notice the default Job information that appears as it relates to the selected job code.
17.	The next step to enter a new position is to indicate the <b>Work Location</b> information.
18.	Click in the <b>Department</b> field. 
19.	Enter the desired information into the <b>Department</b> field. Enter " <b>3000</b> ". 
20.	To see the description of the <b>Department</b> value entered. Press <b>[Tab]</b> .
21.	Notice the <b>Location</b> and <b>Company</b> fields populate with information based on the <b>Department</b> entered.  <b>Note:</b> These fields may or may not populate based on information placed on the Department Table.

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Step	Action
22.	The <b>Reports To</b> field is used to build reporting relationships between positions. It can also be used to generate organizational reports in Position Management, such as the HR Management to Staff Ratio Report.
23.	Click the <b>Look up Reports To</b> button. 
24.	Click the <b>00000007 - Programmer VI</b> link. 
25.	Notice the <b>Reports To</b> field displays the new reports to position.
26.	To meet the State Auditor's Office reporting requirements, the Supervisor Level field is also used to track reporting relationships among positions.
27.	Click the <b>Look up Supervisor Lvl (Alt+5)</b> button. 
28.	Click the <b>NON-MGR</b> link. 
29.	Click the <b>Specific Information</b> tab. 
30.	Use the <b>Specific Information</b> page to enter information that is specific to the position. This page is also used to trigger incumbents position-related data changes.
31.	<b>Note:</b> After an employee has been assigned to this new position, it will be necessary to insert a new effective dated row to update the Update Incumbents field on <b>Position Data - Specific Information</b> page.  This update is to ensure the <b>Update Incumbents</b> checkbox is active. This will enable select position-related updates to automatically appear on the incumbents HR Job Data.
32.	The FTE tracking is located in the <b>Education and Government</b> section.  Click the <b>Expand section</b> button. 
33.	Click in the <b>FTE</b> field. 
34.	This field can be populated with the appropriate FTE values (i.e. 0.5 for 20 hour work week and 1.0 for 40 hour work week).  Enter the desired information into the <b>FTE</b> field. Enter "1". 

Step	Action
35.	Click the <b>Adds to FTE Actual Count</b> option. 
36.	Click the <b>Budget and Incumbents</b> tab. 
37.	After an employee has been assigned to the position, the <b>Budget and Incumbents</b> page is used to view the position's current budget and incumbents.  CAPPS Position Management will display the <b>Current Incumbents</b> information only.  <b>Note:</b> An employee has not been assigned to the position so this information is currently blank.
38.	Click the <b>Save</b> button. 
39.	A new position has been created with the <b>Position Number</b> of 00005477.
40.	This position is now available for HR to assign to an employee.  Remember that once an employee is assigned to a position the HR User notifies the POS User to update the position data to enable automatic update of the incumbents Job Data.  Let's walk through that update process.
41.	An employee has been assigned to the newly created position number of 00005477 with an effective date of 3/26/15. The Position Data must be updated to enable automatic updates of the incumbents Job Data.
42.	Enter the desired information into the <b>Position Number</b> field. Enter " <b>00005477</b> ". <b>Position Number:</b>   begins with ▼   
43.	Click the <b>Search</b> button. 

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**Position Information**  
 Position Number 00005477  
 Headcount Status Filled  
 Current Head Count 1 out of 1  
 \*Effective Date 03/11/2015  
 \*Status Active  
 Reason NEW  
 New Position  
 Action Date 03/11/2015  
 \*Position Status Approved  
 Status Date 03/11/2015  
 Key Position

**Job Information**  
 \*Business Unit TX032 Texas Baseline Agency 032  
 Job Code 0243 Programmer IV  
 \*Reg/Temp Regular  Haz Duty Eligible  
 \*Full/Part Time Full-Time  
 \*Regular Shift Not Applicable  
 Union Code  
 Title Programmer IV  
 Short Title Program4 Detailed Position Description

**Work Location**  
 \*Reg Region USA United States  
 Department 3000 Information Tech - 3.0  
 Company T32 CMPY Texas Baseline Agency 032  
 Location 5001 5001 - 6546 Bell Tower St  
 Reports To 00000007 Programmer VI  
 Dot-Line  
 Supervisor Lvl NON-MGR Non Manager  
 Security Clearance

**Salary Plan Information**  
 Salary Admin Plan B  
 Grade 23  
 Step

100%

Step	Action
44.	Click the scroll bar.

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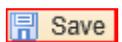
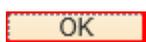
**Position Information**  
 Position Number 00005477  
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 Reason NEW  
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 Title Programmer IV  
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 Company T32 CMPY Texas Baseline Agency 032  
 Location 5001 5001 - 6546 Bell Tower St  
 Reports To 00000007 Programmer VI  
 Dot-Line  
 Supervisor Lvl NON-MGR Non Manager  
 Security Clearance

**Salary Plan Information**  
 Salary Admin Plan B  
 Grade 23  
 Step

100%

Step	Action
45.	Click the <b>Add a new row (+)</b> button. 
46.	Click the <b>Choose a date</b> button. 
47.	Click the <b>Month</b> drop down list. 
48.	Click <b>March</b> March
49.	Click <b>26</b> . 
50.	Click in the <b>Reason</b> field. Reason <input data-bbox="524 898 597 940" type="text"/>
51.	Enter the desired information into the <b>Reason</b> field. Enter " <b>UPD</b> ". Reason <input data-bbox="524 993 597 1035" type="text"/>
52.	Click the <b>Specific Information</b> tab. 
53.	Verify the <b>Update Incumbents</b> box has been checked with the insertion of the new effective dated row. If the box is not checked, manually check the box.  This enables updates to the incumbents Job Data.
54.	Click the <b>Save</b> button. 
55.	A <b>Warning</b> message will appear to inform you of the impact of these changes on the incumbent.  Read the message to check for any additional actions that must be performed.
56.	Click the <b>OK</b> button. 
57.	Congratulations! You have successfully completed this lesson. <b>End of Procedure.</b>

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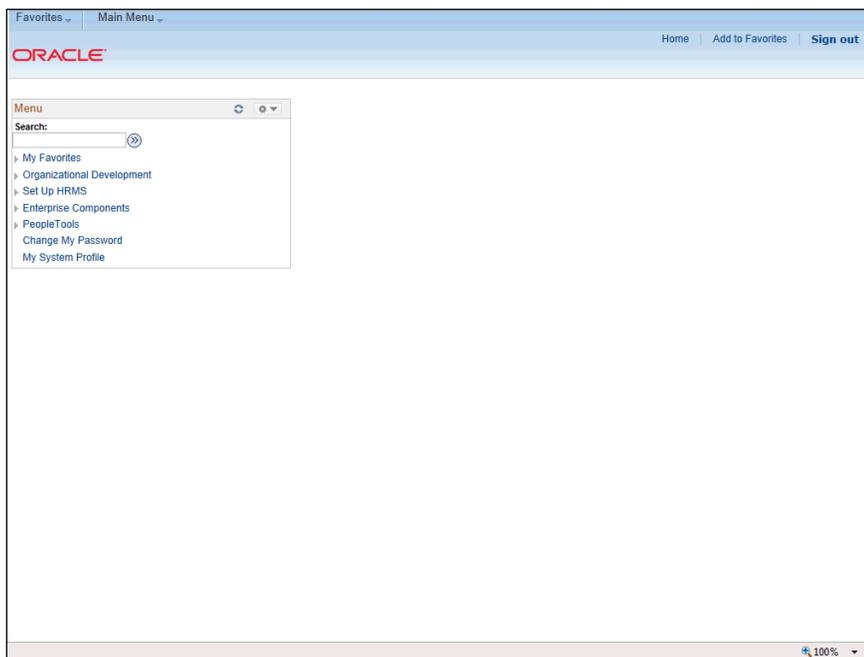


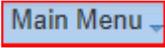
### Search for a Position

**Section 1, Lesson 2 Exercise - Scenario:** Search for an existing Position to view the incumbent

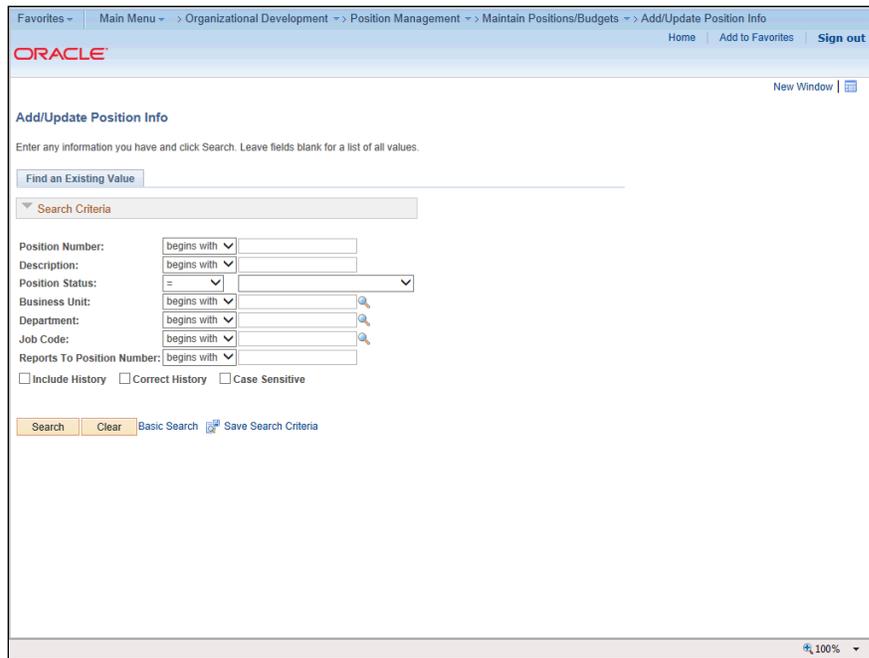
#### Procedure

This lesson will focus on how to search for position information by **Department**, **Job Code** and **Report-To** information.



Step	Action
1.	Click the <b>Main Menu</b> button. 
2.	Click the <b>Organizational Development</b> menu. 
3.	Click the <b>Position Management</b> menu. 
4.	Click the <b>Maintain Positions/Budgets</b> menu. 

Step	Action
5.	Click the <b>Add/Update Position Info</b> menu. 
6.	The <b>Add/Update Position Info</b> page provides several ways to search for an existing Position Number.  Let's start with searching for an existing Position Number by <b>Department</b> .



Oracle Add/Update Position Info search page. Search criteria include: Position Number (begins with), Description (begins with), Position Status (=), Business Unit (begins with), Department (begins with), Job Code (begins with), and Reports To Position Number (begins with). Includes buttons for Search, Clear, Basic Search, and Save Search Criteria.

Step	Action
7.	Click the <b>Department</b> field. 

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**ORACLE** New Window |

**Add/Update Position Info**

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

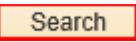
▼ Search Criteria

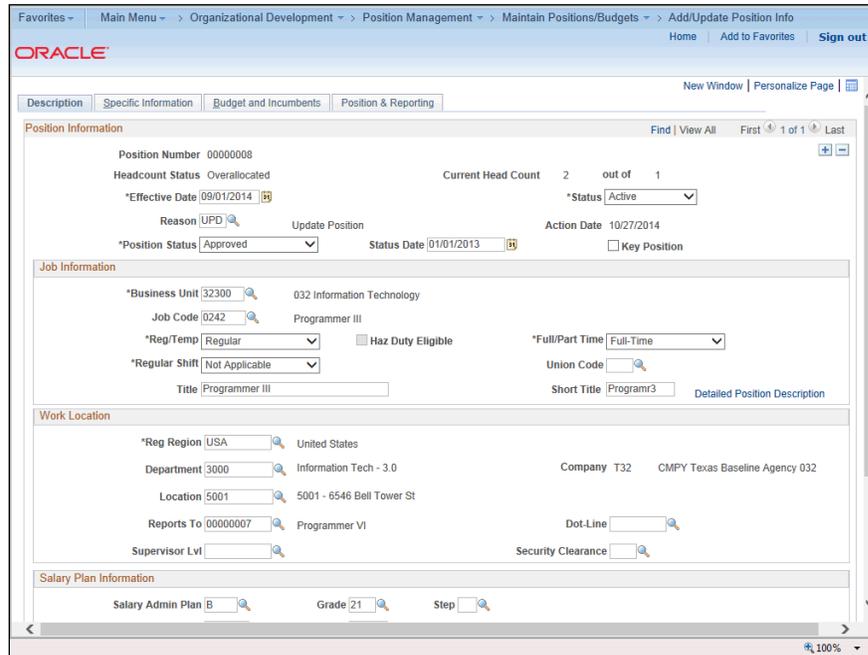
Position Number:    
 Description:    
 Position Status:    
 Business Unit:     
 Department:     
 Job Code:     
 Reports To Position Number:

Include History  
  Correct History  
  Case Sensitive

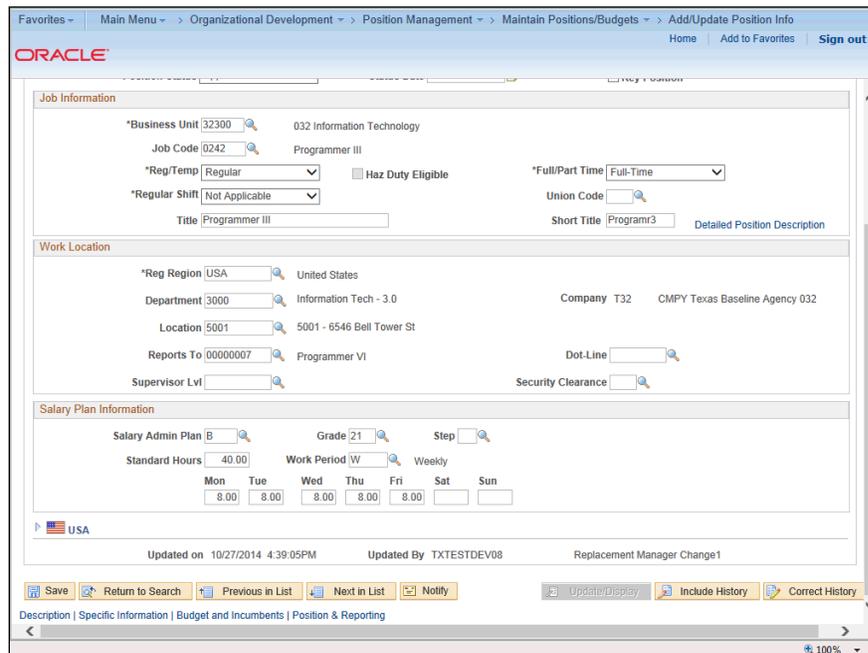
 
   
 [Basic Search](#)  
 [Save Search Criteria](#)

100% ▾

Step	Action
8.	Enter the desired information into the <b>Department</b> field. Enter " <b>3000</b> ". 
9.	Click the <b>Search</b> button. 
10.	The <b>Search Results</b> list the Positions that match the Department search criteria.
11.	Click the <b>Position Number 00000008</b> . 
12.	CAPPS retrieves the selected position information. Note the Department ID matches the search criteria.



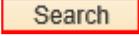
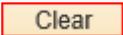
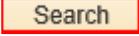
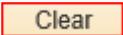
Step	Action
13.	Click the scroll bar



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Step	Action
14.	Click the <b>Return to Search</b> button. 
15.	To begin a new search,  Click the <b>Clear</b> button. 
16.	Click in the <b>Job Code</b> field. 
17.	Let's search for an existing Position Number by <b>Job Code</b> .
18.	Enter the desired information into the <b>Job Code</b> field.  Enter " <b>0203</b> ". 
19.	Click the <b>Search</b> button. 
20.	The <b>Search Results</b> lists the positions numbers associated with the <b>Job Code</b> of '0203'.
21.	Click the <b>Clear</b> button. 
22.	Click in the <b>Reports To Position Number</b> field. 
23.	Enter the desired information into the <b>Reports To Position Number</b> field.  Enter " <b>0000007</b> ". 
24.	Click the <b>Search</b> button. 
25.	The <b>Search Results</b> list all position numbers with the <b>Reports To Position Number</b> of '0000007'
26.	Click the <b>Clear</b> button. 
27.	Congratulations! You have successfully completed this lesson. <b>End of Procedure.</b>

## Update a Position

**Section 1, Lesson 3 Exercise - Scenario:** Update an existing position with a 'non-pay impacting' data change.

Use CAPPS Position Data pages to make changes to any position-related information that pertains to the job or position itself, such as moving the position from one department to another or from one location to another as well as changing the position status.

The position-related information within CAPPS falls into two categories:

- **Non-pay impacting** - Position-related information that does not impact an employees pay. Information such as Reports To, Department and Location do not impact an employees pay. So after these data changes are updated, a new effective dated row will automatically appear on the incumbents Job Data. The effective dates on both the Position Data and Job Data records will match.
- **Pay impacting** - position-related information that does impact an employees pay. Information such as job code and compensation may impact an employees pay. These changes require the teamwork of both the POS User and HR User to ensure the records stay in synch. For the pay impacting information require specific security roles to make these changes.

**Effective dating** is a key consideration when updating position information. Position information is updated in Human Resources by adding effective-dated data rows to the position data and/or incumbent job records. Effective dates provide the ability to maintain a complete chronological history of all data and tables, whether it was changed two years ago or to go into effect in two months.

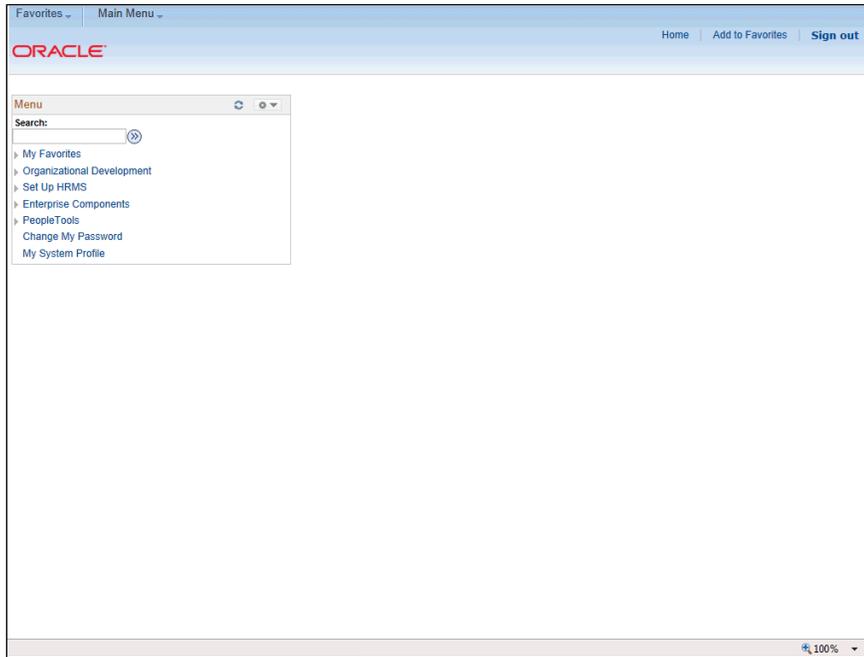
**Note:** Budget or Fiscal year position updates will be performed by the support team for CAPPS.

### Procedure

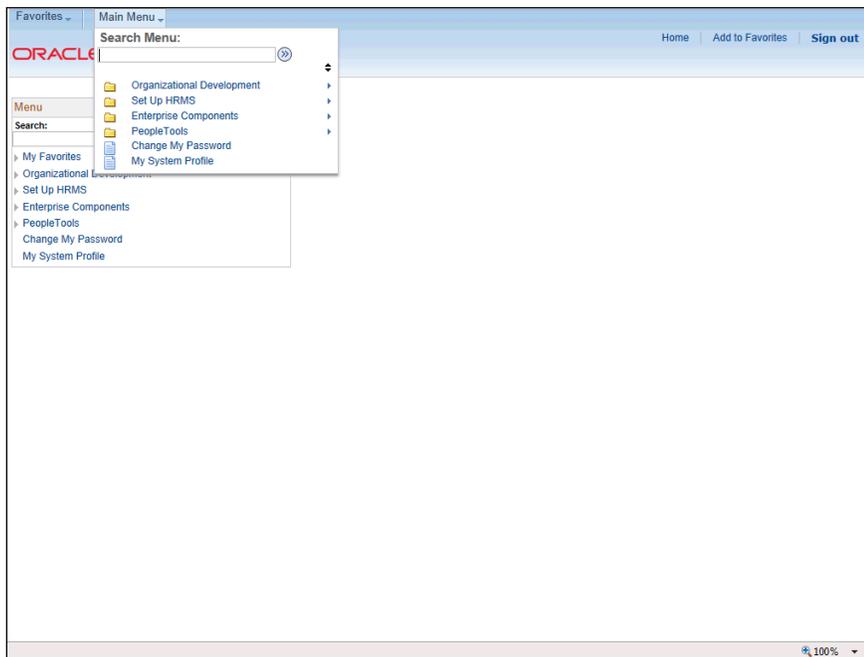
This lesson will focus on how to update the department for an existing position.

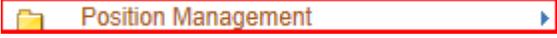
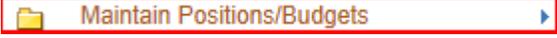
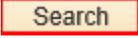
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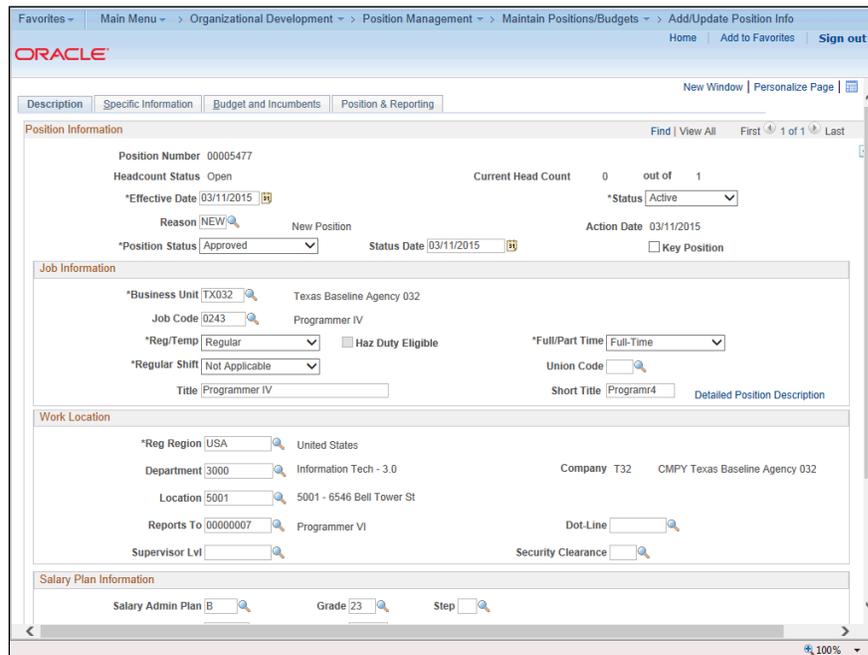
## EUT Course



Step	Action
1.	Click the <b>Main Menu</b> button. 



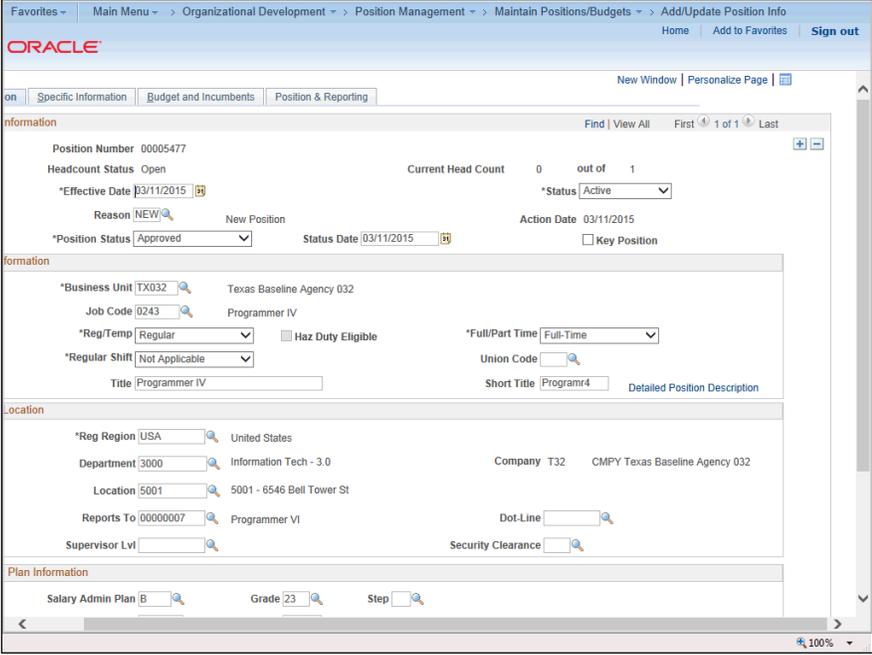
Step	Action
2.	Click the <b>Organizational Development</b> menu. 
3.	Click the <b>Position Management</b> menu. 
4.	Click the <b>Maintain Positions/Budgets</b> menu. 
5.	Click the <b>Add/Update Position Info</b> menu. 
6.	Enter the desired information into the <b>Position Number</b> field. Enter " <b>00005477</b> ". <b>Position Number:</b>   begins with <input type="text" value=""/>
7.	Click the <b>Search</b> button. 
8.	The <b>Position Management - Description</b> page appears displaying the selected Position Number for update.



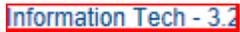
The screenshot shows the Oracle HR/Payroll interface for the 'Position Management - Description' page. The breadcrumb trail is: Favorites > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info. The page displays the following information:

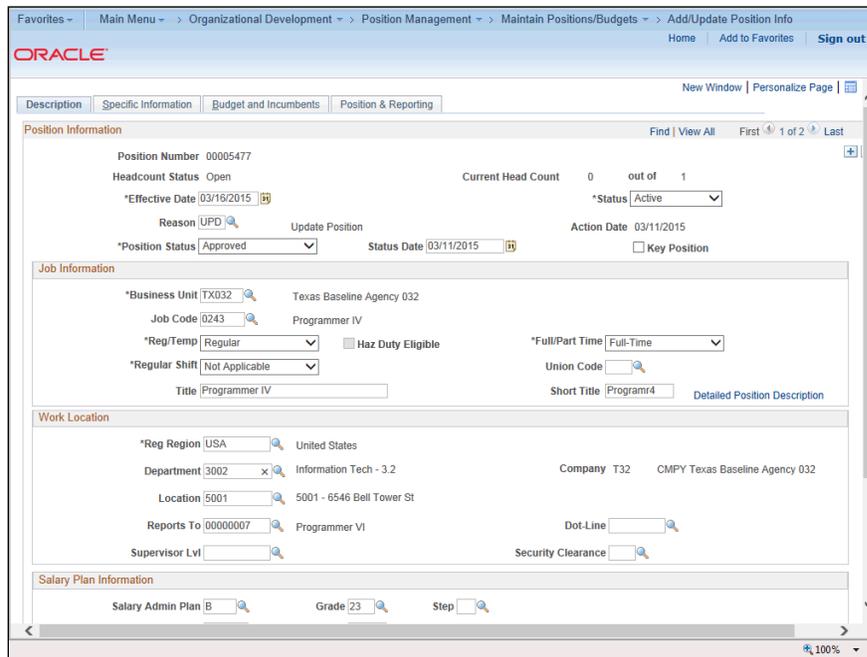
- Position Information:** Position Number 00005477, Headcount Status Open, Current Head Count 0 out of 1, \*Effective Date 03/11/2015, \*Status Active, Reason NEW, New Position, Action Date 03/11/2015, \*Position Status Approved, Status Date 03/11/2015,  Key Position.
- Job Information:** \*Business Unit TX032 Texas Baseline Agency 032, Job Code 0243 Programmer IV, \*Reg/Temp Regular  Haz Duty Eligible, \*Full/Part Time Full-Time, \*Regular Shift Not Applicable, Union Code, Title Programmer IV, Short Title Program4, Detailed Position Description.
- Work Location:** \*Reg Region USA United States, Department 3000 Information Tech - 3.0, Company T32 CMPY Texas Baseline Agency 032, Location 5001 5001 - 6546 Bell Tower St, Reports To 00000007 Programmer VI, Dot-Line, Supervisor Lvl, Security Clearance.
- Salary Plan Information:** Salary Admin Plan B, Grade 23, Step.

Step	Action
9.	Click the scroll bar.



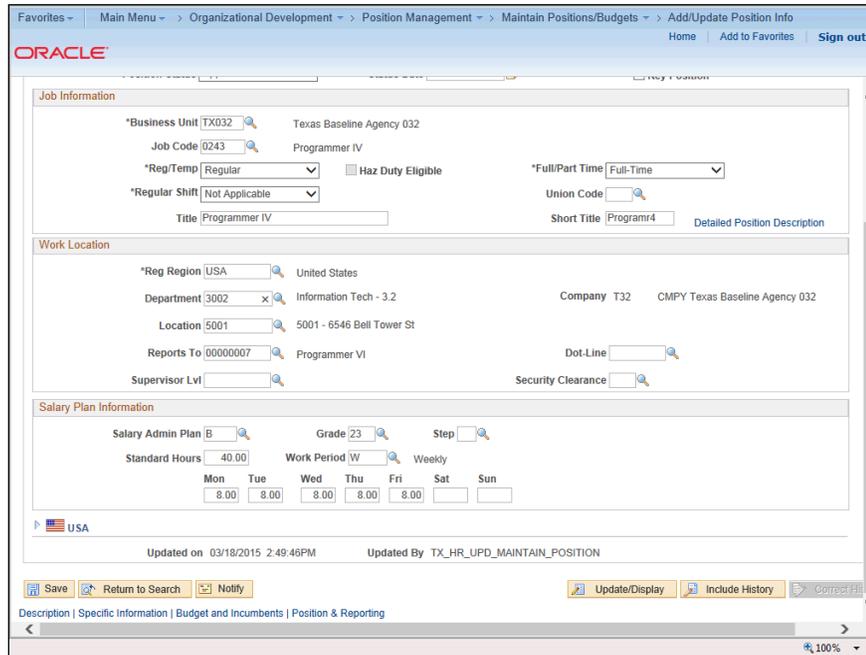
Step	Action
10.	Click the <b>Add (+) new row</b> button. 
11.	The <b>Effective Date</b> defaults to the system date, which is usually the current date. Change this unless the current date is the first day that the change takes effect.  In this example, change the <b>Effective Date</b> to March 16, 2015.
12.	Click the <b>Choose a date</b> button. 
13.	Click <b>16</b> . 
14.	Enter the reason for the new row.  Click the <b>Look up Reason</b> button. 

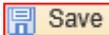
Step	Action
15.	Click the <b>UPD</b> link. 
16.	Click the <b>Look up Department</b> button. 
17.	Click the <b>Information Tech - 3.2</b> link. 

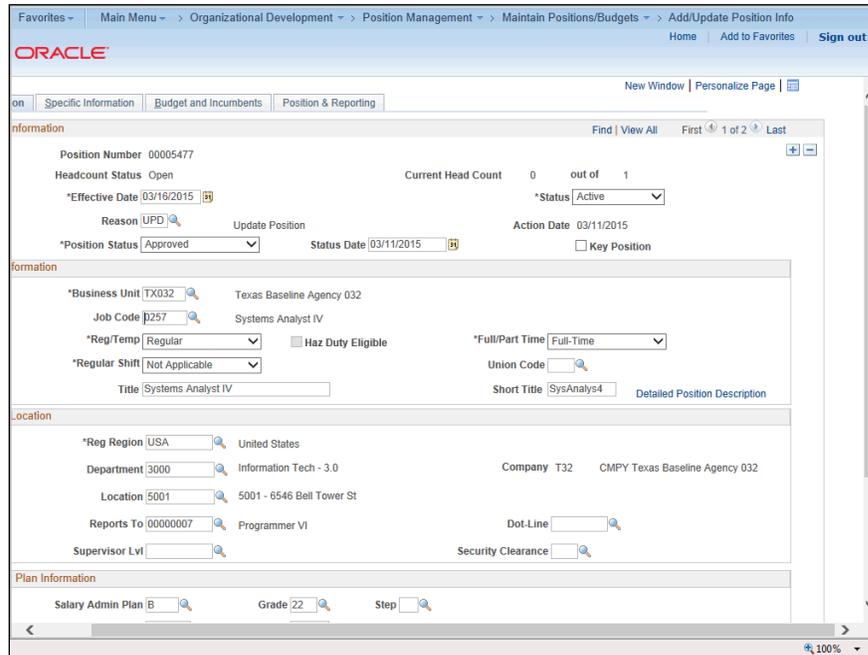


The screenshot displays the Oracle HR/Payroll interface for 'Add/Update Position Info'. The breadcrumb trail is: Favorites > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info. The page includes tabs for Description, Specific Information, Budget and Incumbents, and Position & Reporting. The main content area is divided into sections: Position Information (with fields for Position Number, Headcount Status, Effective Date, Reason, Position Status, Status Date, and Action Date), Job Information (with fields for Business Unit, Job Code, Regular/Temp, Regular Shift, Title, Full/Part Time, and Short Title), Work Location (with fields for Reg Region, Department, Location, Reports To, Supervisor Lvl, Company, and Dot-Line), and Salary Plan Information (with fields for Salary Admin Plan, Grade, and Step). A scroll bar is visible at the bottom of the form.

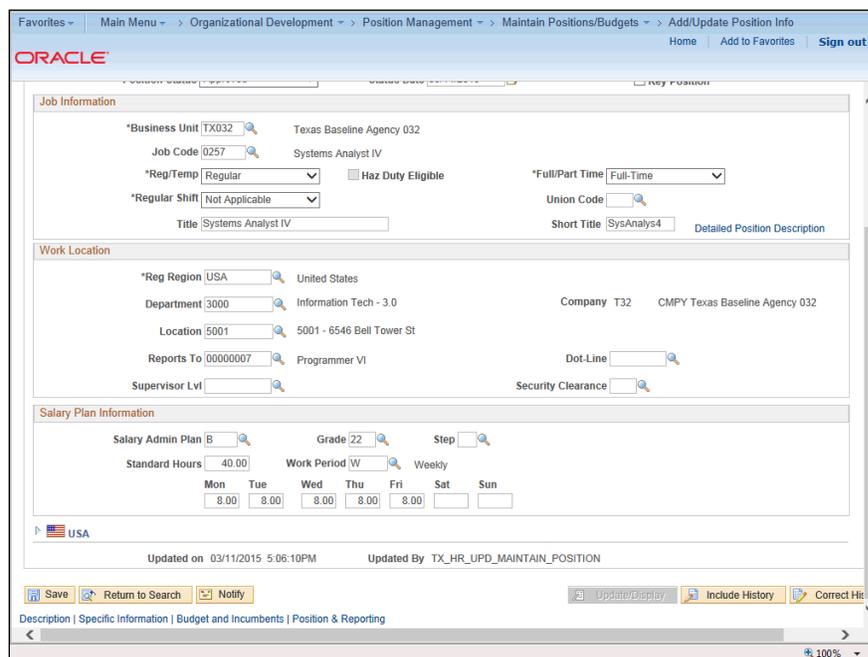
Step	Action
18.	Click the scroll bar.



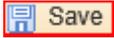
Step	Action
19.	Click the <b>Save</b> button. 
20.	Clicking the <b>Save</b> button causes CAPPS Position Management to validate the new information against the incumbents' job record and existing position data. The result of this validation may generate either a <b>warning</b> or an <b>error</b> message. <ul style="list-style-type: none"> <li>• A <b>warning message</b> alerts of a potential data entry error or change. However, it allows the updates to be saved, if desired.</li> <li>• An <b>error message</b> stops the process due to data entry or process error. It requires the user to correct the problem before continuing.</li> </ul> <p>In this example, a warning message was generated to inform the user that no updates will be made to the incumbent data. However, if there were incumbents the job data would need to be maintained accordingly.</p>
21.	Click the <b>OK</b> button. 

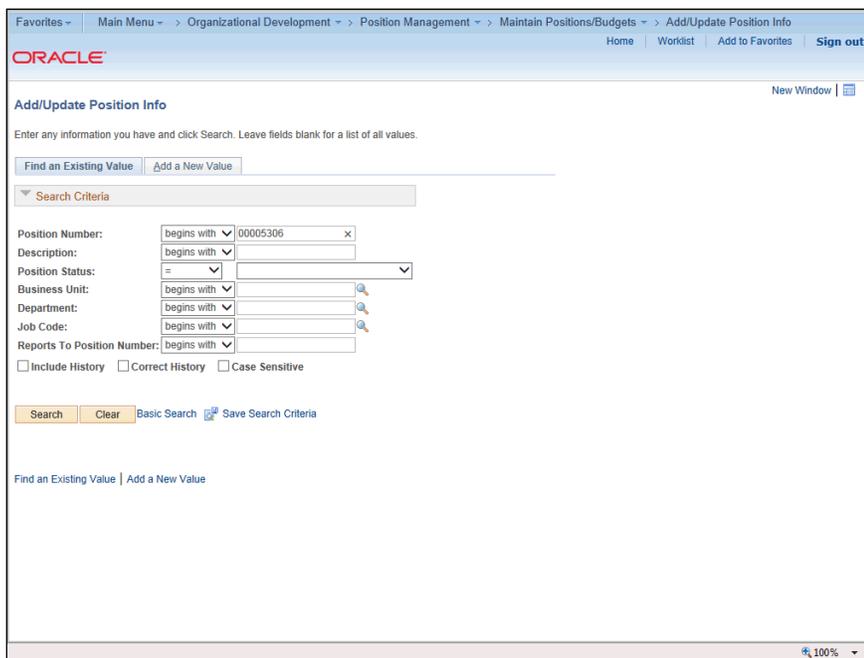


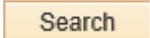
Step	Action
22.	Click the scroll bar.
23.	Click the scroll bar.

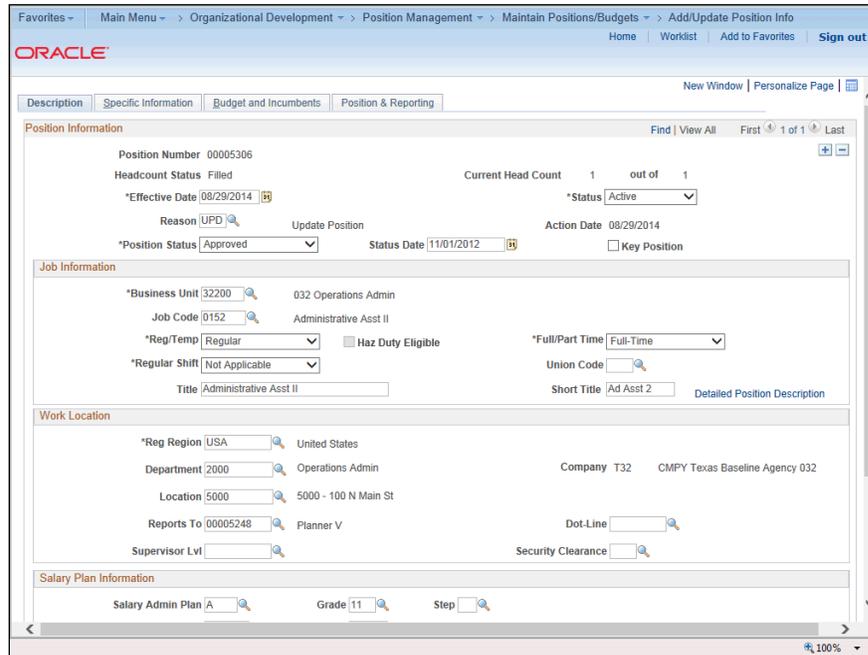


Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.00	8.00	8.00	8.00	8.00		

Step	Action
24.	Click the <b>Save</b> button. 
25.	After a ' <b>non-pay impacting</b> ' update has been made to position data, CAPPS automatically inserts a row on the incumbents Job Data.  Let's look at an example of this activity on the incumbents Job Data.
26.	Click in the <b>Position Number</b> field. <b>Position Number:</b>   begins with ▼ 
27.	Enter the desired information into the <b>Position Number</b> field. Enter " <b>00005306</b> ". <b>Position Number:</b>   begins with ▼ 



Step	Action
28.	Click the <b>Search</b> button. 



The screenshot shows the Oracle HR/Payroll system interface. The breadcrumb trail is: Favorites > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info. The 'Budget and Incumbents' tab is active. The 'Position Information' section shows: Position Number 00005306, Headcount Status Filled, Current Head Count 1 out of 1, Effective Date 08/29/2014, Status Active, Reason UPD, Update Position, Action Date 08/29/2014, Position Status Approved, Status Date 11/01/2012, and Key Position checkbox. The 'Job Information' section shows: Business Unit 32200 (032 Operations Admin), Job Code 0152 (Administrative Asst II), Reg/Temp Regular, Haz Duty Eligible checkbox, Full/Part Time Full-Time, Regular Shift Not Applicable, Union Code, Title Administrative Asst II, and Short Title Ad Asst 2. The 'Work Location' section shows: Reg Region USA (United States), Department 2000 (Operations Admin), Location 5000 (5000 - 100 N Main St), Company T32 (CMPY Texas Baseline Agency 032), Reports To 00005248 (Planner V), Supervisor Lvl, and Dot-Line. The 'Salary Plan Information' section shows: Salary Admin Plan A, Grade 11, and Step.

Step	Action
29.	Click the <b>Budget and Incumbents</b> tab. 
30.	This page displays a list of the <b>Current Incumbents</b> assigned to this position.
31.	Click the <b>Job Data</b> link. 
32.	Several indicators on the incumbents Job Data identify that position data has been updated.  The <b>Action</b> , <b>Reason Code</b> and the selected <b>Position Management Record</b> checkbox. Also, notice the <b>Effective Date</b> is the same on the Job Data as it is on the Position Data.

# CAPPS HR/PAYROLL

## EUT Course



Job Data

Temp Oryx Empl ID 0000000259  
Employee Empl Record 0

Work Location

\*Effective Date: 08/29/2014  
Effective Sequence: 0  
HR Status: Active  
Payroll Status: Active

Action: Position Change  
Reason Code: UPD Update Position  
\*Job Indicator: Primary Job

Position Number: 00005306 Administrative Asst II  
Position Entry Date: 06/15/2014  
Regulatory Region: USA United States  
Company: T32 CMPY Texas Baseline Agency 032  
Business Unit: 32200 032 Operations Admin  
Department: 2000 Operations Admin  
Department Entry Date: 06/15/2014  
Location: 5000 5000 - 100 N Main St  
Establishment ID: 032 Texas Baseline Agency 032 Date Created: 08/29/2014  
Last Start Date: 06/01/2014  
Expected Job End Date: Retirement Code: Retirement 90-Day Wait

Job Data Employment Data Earnings Distribution Benefits Program Participation

Step	Action
33.	Click the scroll bar.

Job Data

Temp Oryx Empl ID 0000000259  
Employee Empl Record 0

Work Location

\*Effective Date: 08/29/2014  
Effective Sequence: 0  
HR Status: Active  
Payroll Status: Active

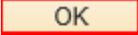
Action: Position Change  
Reason Code: UPD Update Position  
\*Job Indicator: Primary Job

Position Number: 00005306 Administrative Asst II  
Position Entry Date: 06/15/2014  
Regulatory Region: USA United States  
Company: T32 CMPY Texas Baseline Agency 032  
Business Unit: 32200 032 Operations Admin  
Department: 2000 Operations Admin  
Department Entry Date: 06/15/2014  
Location: 5000 5000 - 100 N Main St  
Establishment ID: 032 Texas Baseline Agency 032 Date Created: 08/29/2014  
Last Start Date: 06/01/2014  
Expected Job End Date: Retirement Code: Retirement 90-Day Wait

Job Data Employment Data Earnings Distribution Benefits Program Participation

OK Cancel Apply

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Step	Action
34.	Click the <b>OK</b> button. 
35.	Congratulations! You have successfully completed this lesson. <b>End of Procedure.</b>

## Maintain a Position

**Section 1, Lesson 4 Exercise - Scenario:** Maintain an existing position requiring a 'pay impacting' data change.

**Effective dates** are always important in CAPPS, but they take on special meaning when you maintain positions, particularly when you change data in the fields that appear in both the Position Data and Job Data pages.

Position-related information within CAPPS falls into two categories:

- **Non-pay impacting** - position-related information that does not impact an employees pay. Information such as Reports To, Department and Location do not impact an employees pay. So after these data changes are updated, a new effective dated row will automatically appear on the incumbent Job Data. The effective dates on both the Position Data and Job Data records must match.
- **Pay impacting** - position-related information that does impact an employees pay. Information such as job code and compensation may impact an employees pay. These changes require the teamwork of both the POS User and HR User to ensure the records stay in synch. The pay impacting information require specific security roles to make these changes.

CAPPS Position Management has business processes to assist in tracking discrepancies between Position Data and Job Data:

- **Audit-Exception Positions Report** - identifies the position-related fields that exist on both the Position Data and Job Data that are out of synch.
- **Security Roles** - based on the Roles assigned to the POS User and the HR User, email notifications are sent to alert the user when data is out of synch.

## Procedure

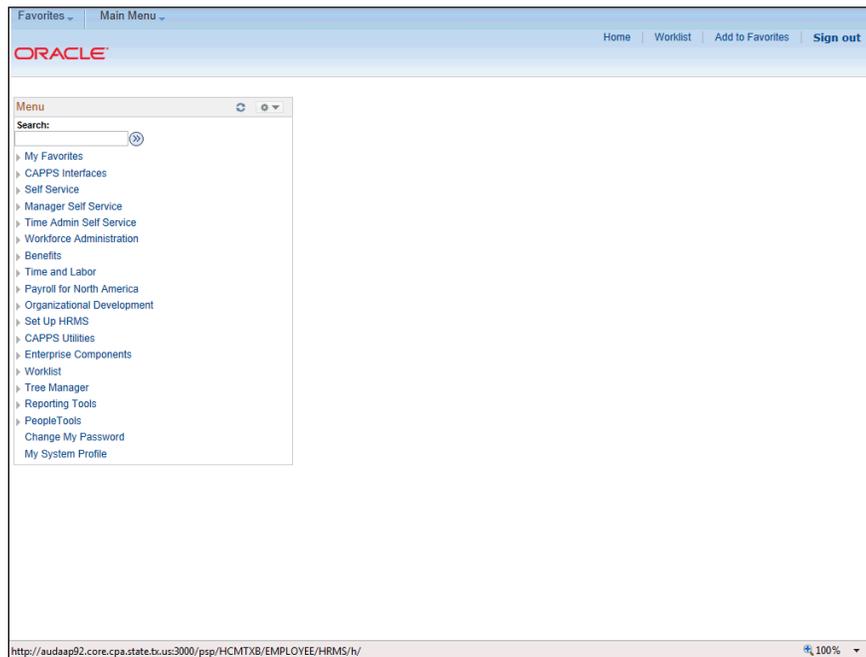
This lesson will focus on the steps to maintain the information between the Position Data and Job Data pages.

# CAPPS HR/PAYROLL

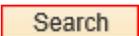
## EUT Course



Step	Action
1.	<p>Position-related data exists on both the Job Data and Position Data pages within the CAPPS HR/Payroll System. It is critical that this related information remain in synch to maintain the data integrity of the employee records.</p> <p>Based on the security roles of the HR User and POS User, each has access to update position-related data in their assigned modules (Human Resources and Position Management, respectively). Because of this relationship across modules, maintenance to the records must occur on frequent bases.</p> <p>Let's walk through this maintenance process:</p>
2.	<p>These are the activities that must be taken when HR initiates a position-related data change that is 'pay impacting'.</p> <p>Let's walk through the steps after receiving notification of the position-related data change.</p>



Step	Action
3.	<p>Click the <b>Main Menu</b> button.</p> <p><b>Main Menu</b></p>

Step	Action
4.	Click the <b>Organizational Development</b> menu. 
5.	Click the <b>Position Management</b> menu. 
6.	Click the <b>Maintain Positions/Budgets</b> menu. 
7.	Click the <b>Add/Update Position Info</b> menu. 
8.	The POS User has been notified via email of a position-related data change to an employees' HR Job Data that does not exist in Position Management.  Here are the updates that must be placed in Position Data:  <b>Position Number:</b> 00005204 <b>Effective Date:</b> 04/01/2015 <b>Job Code:</b> 0158 - Administrative Asst V <b>Salary Plan:</b> A <b>Salary Grade:</b> 17
9.	Enter the desired information into the <b>Position Number</b> field. Enter " <b>00005204</b> ". <b>Position Number:</b>   begins with ▼ 
10.	Click the <b>Search</b> button. 
11.	These are the fields that must be updated to match the Job Data record for the incumbent.
12.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
13.	The HR Job Data record was updated with an effective dated row of 04/01/2015. This must also be the effective date for the new row in Position Data.
14.	Click the <b>Look up Reason (Alt+5)</b> button. 
15.	Click the <b>UPD</b> link. 

# CAPPS HR/PAYROLL

## EUT Course



Oracle HR/Payroll System - Add/Update Position Info

Position Information

Position Number: 00005204  
 Headcount Status: Filled  
 Current Head Count: 1 out of 1  
 \*Effective Date: 04/01/2015  
 \*Status: Active  
 Reason: UPD  
 Update Position  
 Action Date: 04/01/2015  
 \*Position Status: Approved  
 Status Date: 11/01/2012  
 Key Position

Job Information

\*Business Unit: 52400 052 HR Administration  
 Job Code: 0156 Administrative Asst IV  
 \*Reg/Temp: Regular  Haz Duty Eligible  
 \*Full/Part Time: Full-Time  
 \*Regular Shift: Not Applicable  
 Union Code:  
 Title: Administrative Asst IV  
 Short Title: Ad Asst 4  
[Detailed Position Description](#)

Work Location

\*Reg Region: USA United States  
 Department: 4000 HR Admin  
 Company: T52 Texas Baseline Agency 052  
 Location: 6001 6001 - 600 S Maple St  
 Reports To: 00005430 Manager III  
 Dot-Line:  
 Supervisor Lvl:  
 Security Clearance:

Salary Plan Information

Salary Admin Plan: A  
 Grade: 15  
 Step:

Step	Action
16.	Click the <b>Job Code</b> field. Job Code <input type="text" value="0156"/>

Oracle HR/Payroll System - Add/Update Position Info

Position Information

Position Number: 00005204  
 Headcount Status: Filled  
 Current Head Count: 1 out of 1  
 \*Effective Date: 04/01/2015  
 \*Status: Active  
 Reason: UPD  
 Update Position  
 Action Date: 04/01/2015  
 \*Position Status: Approved  
 Status Date: 11/01/2012  
 Key Position

Job Information

\*Business Unit: 52400 052 HR Administration  
 Job Code: 0156 Administrative Asst IV  
 \*Reg/Temp: Regular  Haz Duty Eligible  
 \*Full/Part Time: Full-Time  
 \*Regular Shift: Not Applicable  
 Union Code:  
 Title: Administrative Asst IV  
 Short Title: Ad Asst 4  
[Detailed Position Description](#)

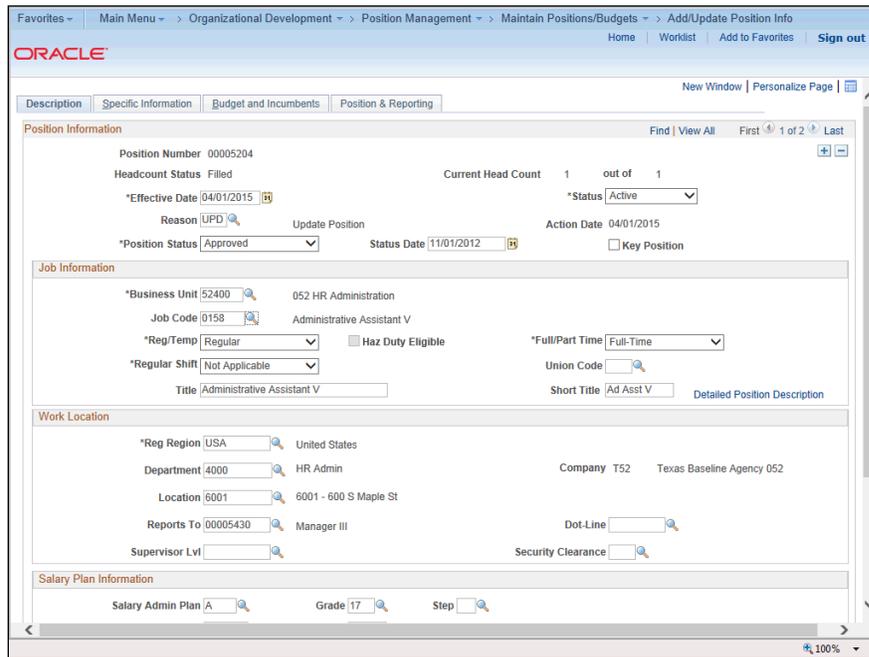
Work Location

\*Reg Region: USA United States  
 Department: 4000 HR Admin  
 Company: T52 Texas Baseline Agency 052  
 Location: 6001 6001 - 600 S Maple St  
 Reports To: 00005430 Manager III  
 Dot-Line:  
 Supervisor Lvl:  
 Security Clearance:

Salary Plan Information

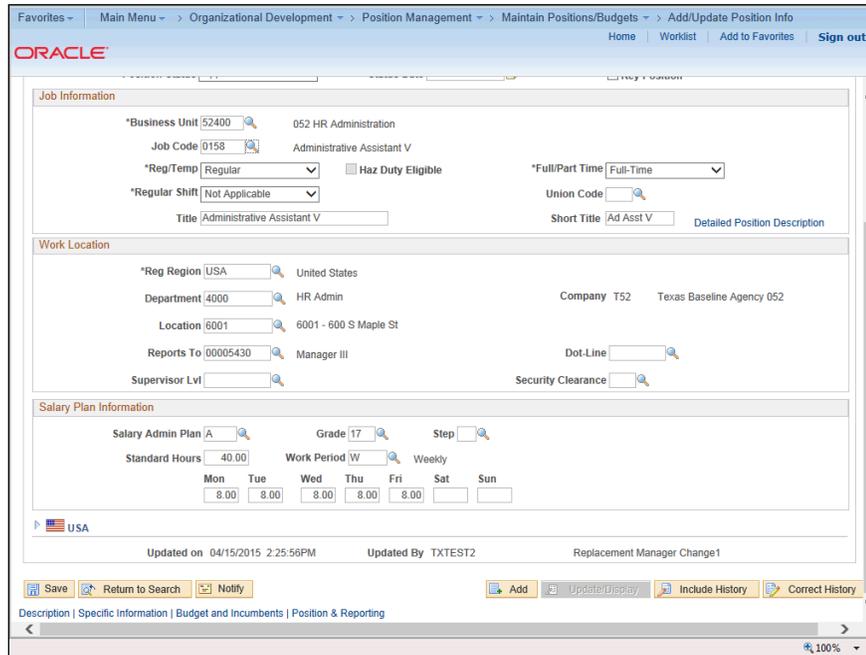
Salary Admin Plan: A  
 Grade: 15  
 Step:

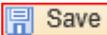
Step	Action
17.	Enter the desired information into the <b>Job Code</b> field. Enter " <b>0158</b> ". Job Code <input type="text" value="0158"/>
18.	Press <b>[Tab]</b> .
19.	Notice the <b>Job Code, Salary Admin Plan</b> and <b>Grade</b> now reflect the updated information.



The screenshot shows the Oracle HR/Payroll system interface. The breadcrumb trail is: Favorites > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info. The page title is "ORACLE". The navigation tabs are: Description, Specific Information, Budget and Incumbents, Position & Reporting. The "Position Information" section shows: Position Number 00005204, Headcount Status Filled, Current Head Count 1 out of 1, Effective Date 04/01/2015, Status Active, Reason UPD, Update Position, Action Date 04/01/2015, Position Status Approved, Status Date 11/01/2012, and Key Position checkbox. The "Job Information" section shows: Business Unit 52400 (052 HR Administration), Job Code 0158 (Administrative Assistant V), Reg/Temp Regular, Haz Duty Eligible checkbox, Full/Part Time Full-Time, Regular Shift Not Applicable, Union Code, Title Administrative Assistant V, and Short Title Ad Asst V. The "Work Location" section shows: Reg Region USA (United States), Department 4000 (HR Admin), Location 6001 (6001 - 600 S Maple St), Company T52 (Texas Baseline Agency 052), Reports To 00005430 (Manager III), Supervisor Lvl, and Security Clearance. The "Salary Plan Information" section shows: Salary Admin Plan A, Grade 17, and Step.

Step	Action
20.	Click the scroll bar.



Step	Action
21.	Click the <b>Save</b> button. 
22.	This warning message was generated to inform the user that updates will not be <u>automatically</u> made to the incumbent Job Data.  The update in our example was made to ' <b>pay impacting</b> ' position-related data initiated by the HR User, so the incumbents job data was modified accordingly.
23.	Click the <b>OK</b> button. 
24.	After the position information has been updated, the POS User must contact the HR User to re-synch the Job Data and Position Data records for the incumbents.
25.	The next step is to run the Audit - Exception Positions Report.
26.	After receiving the notification (via email) from the HR User regarding the Position Data Override and updating the Position Data, the POS User will run the <b>Audit-Position Exceptions Report</b> to ensure the update has been completed.  It is recommended to run this report frequently to identify any other position-related discrepancies between Position Data and Job Data.  This report is discussed in detail later in the course.

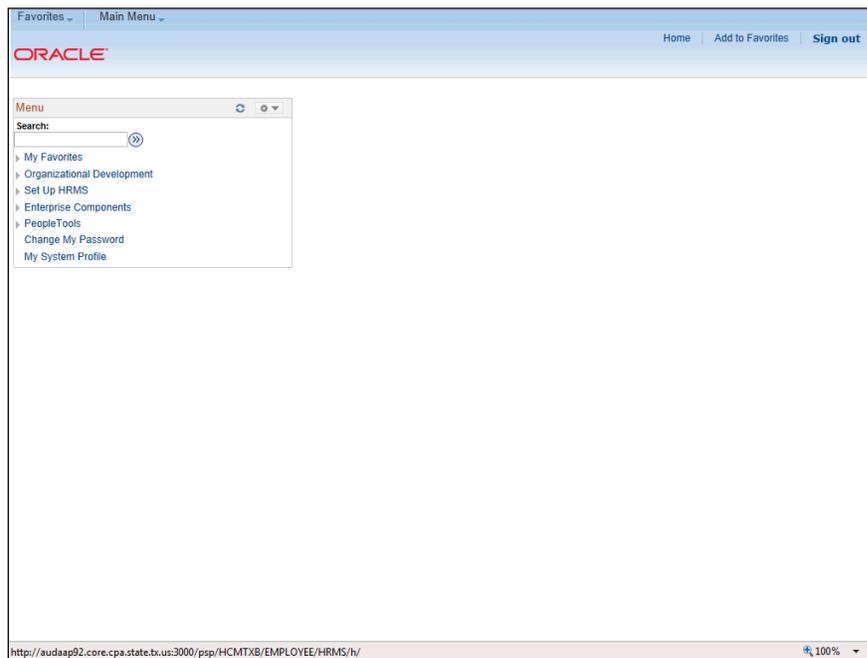
Step	Action
27.	Congratulations! You have successfully completed this lesson. <b>End of Procedure.</b>

## Clone a Position

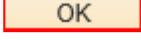
**Section 1, Lesson 5 Exercise - Scenario:** Create a new position that has the same job code, department and location as an existing position.

### Procedure

This lesson will focus on how to create a new position that has the exact characteristics as an existing position.



Step	Action
1.	Click the <b>Main Menu</b> 
2.	Click the <b>Organizational Development</b> menu. 
3.	Click the <b>Position Management</b> menu. 

Step	Action
4.	Click the <b>Maintain Positions/Budgets</b> menu. 
5.	Click the <b>Add/Update Position Info</b> menu. 
6.	Click the <b>Add a New Value</b> tab. 
7.	Click the <b>Add</b> button. 
8.	At this point, you would have identified an existing position that has the appropriate characteristics to clone.
9.	This button only appears when a new positions is being added.  Click the <b>Initialize</b> button. 
10.	Enter the desired information into the <b>Position Number</b> field. Enter " <b>0005289</b> ". 
11.	Click the <b>OK</b> button. 
12.	Click the scrollbar.
13.	Click the <b>Save</b> button. 
14.	Position Management has created a new Position Number with the exact characteristics as an existing position.
15.	Congratulations! You have successfully completed this lesson. <b>End of Procedure.</b>

## Section 2 - Process a Position Change Request

### Position Data Change

**Section 2, Lesson 2 Exercise - Scenario:** An incorrect location was entered on a Position that must be corrected

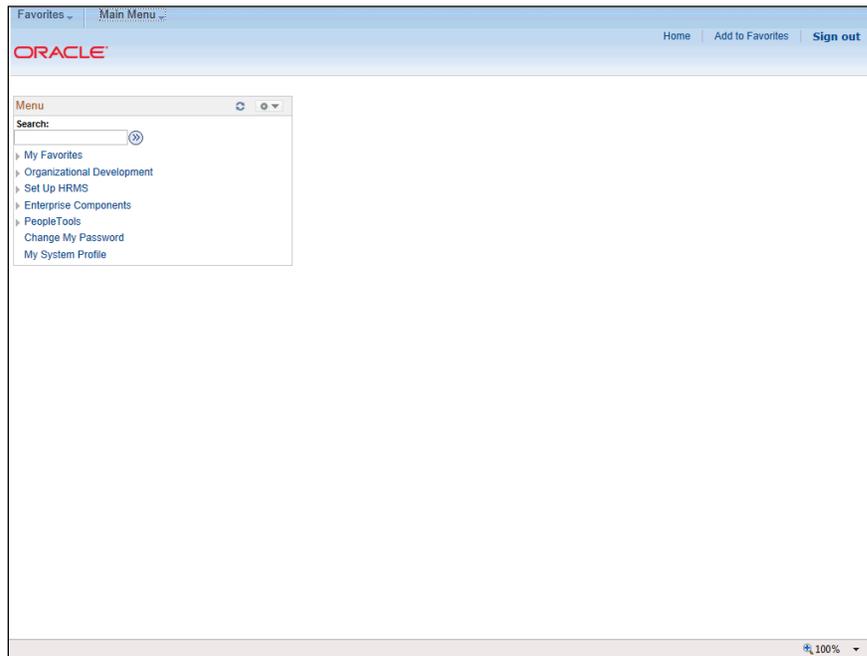
What if you've just saved a new data row, and discover that you entered the wrong information in one of the fields that you changed? You don't want to insert a new row to

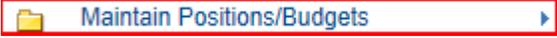
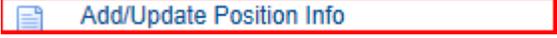
correct the mistake, nor do you want to delete the row because it's essentially correct. To solve this problem, use the **Correction** action to fix the data but keep the row intact.

**Warning:** Correcting position data overwrites any previous information for that effective dated row.

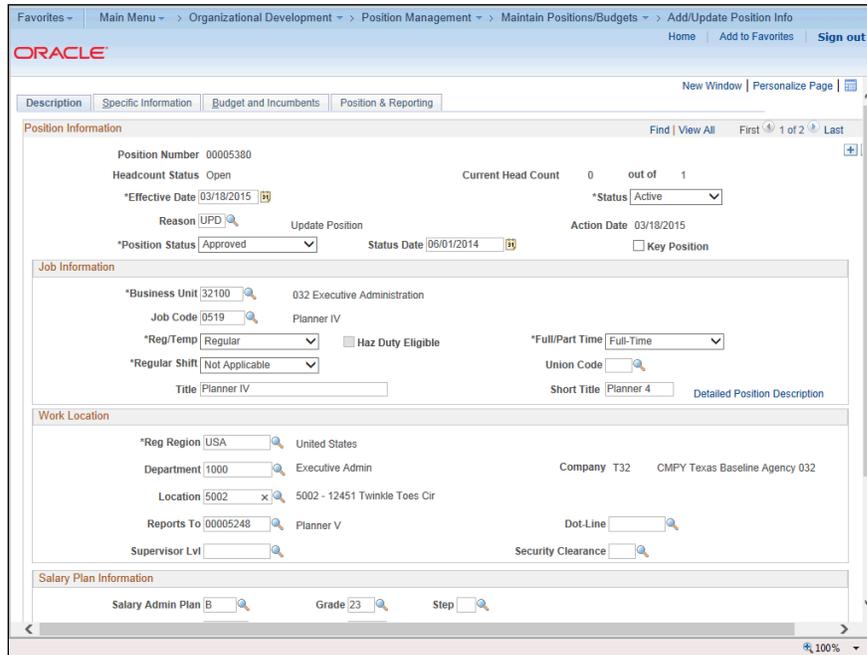
## Procedure

This lesson will focus on how to correct a mistake on a newly created position row.



Step	Action
1.	Click the <b>Main Menu</b> button. 
2.	Click the <b>Organizational Development</b> menu. 
3.	Click the <b>Position Management</b> menu. 
4.	Click the <b>Maintain Positions/Budgets</b> menu. 
5.	Click the <b>Add/Update Position Info</b> menu. 

Step	Action
6.	Enter the desired information into the <b>Position Number</b> field. Enter " <b>0005380</b> ". Position Number:   begins with ▼ <input type="text"/>
7.	Click the <b>Search</b> button. <input type="button" value="Search"/>
8.	When making a correction to position data it is important to consider the following: CAPPS cross-updates data when you're making corrections, provided that: <ul style="list-style-type: none"> <li>• A correction is being made to a current or future effective-dated position row.  <b>Note:</b> The actual effective date cannot be changed.</li> <li>• The position data row has a matching job row (same effective date, created from the Position Data pages) in the Job Data pages.</li> <li>• The matching job data row in the Job Data pages is also current or future.</li> <li>• Position data has not been overridden on the Job Data - Work Location tab for related incumbents.</li> </ul> <b>Warning:</b> Correcting position data overwrites any previous information for that effective dated row.
9.	This position record requires an update to the Location number. Let's start by inserting a new effective-dated row.
10.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. <input type="button" value="+"/>
11.	Click in the <b>Reason</b> field. Reason <input type="text"/>
12.	Enter the desired information into the <b>Reason</b> field. Enter " <b>UPD</b> ". Reason <input type="text"/>
13.	Click the <b>Look up Location (Alt+5)</b> button. <input type="button" value="Look up Location"/>
14.	Click the <b>5002 - 12451 Twinkle Toes Cir</b> link. <input type="button" value="5002 - 12451 Twinkle Toes Cir"/>



Oracle HR/Payroll - Add/Update Position Info

Position Information

Position Number: 00005380  
 Headcount Status: Open  
 \*Effective Date: 03/18/2015  
 Reason: UPD  
 \*Position Status: Approved  
 Status Date: 06/01/2014  
 Current Head Count: 0 out of 1  
 \*Status: Active  
 Action Date: 03/18/2015  
 Key Position:

Job Information

\*Business Unit: 32100 - 032 Executive Administration  
 Job Code: 0519 - Planner IV  
 \*Reg/Temp: Regular  
 \*Regular Shift: Not Applicable  
 Title: Planner IV  
 \*Full/Part Time: Full-Time  
 Union Code:   
 Short Title: Planner 4

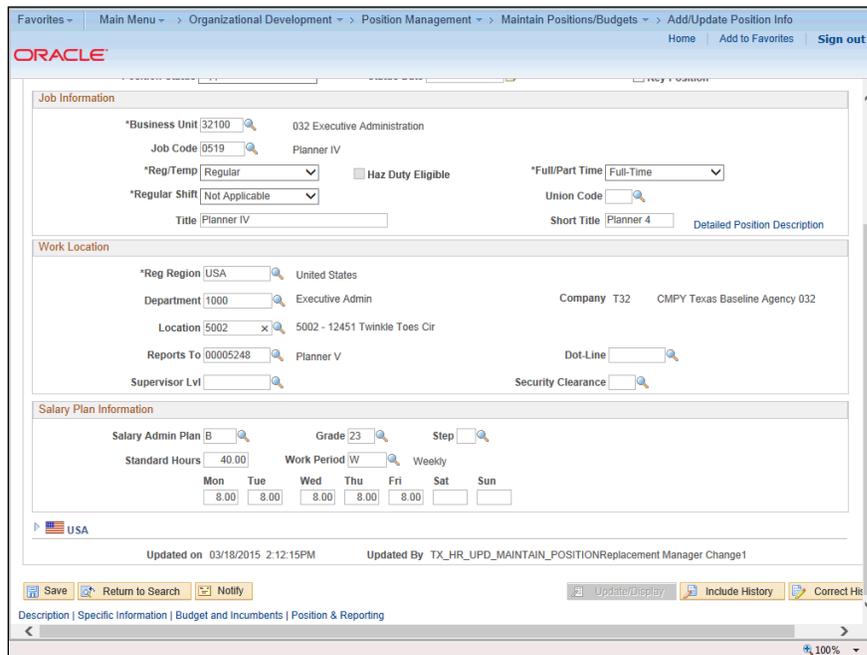
Work Location

\*Reg Region: USA - United States  
 Department: 1000 - Executive Admin  
 Location: 5002 - 5002 - 12451 Twinkle Toes Cir  
 Reports To: 00005248 - Planner V  
 Supervisor Lvl:   
 Company: T32 - CMPY Texas Baseline Agency 032  
 Dot-Line:   
 Security Clearance:   
 Detailed Position Description

Salary Plan Information

Salary Admin Plan: B  
 Grade: 23  
 Step:   
 Standard Hours: 40.00  
 Work Period: Weekly  
 Mon: 8.00, Tue: 8.00, Wed: 8.00, Thu: 8.00, Fri: 8.00, Sat: , Sun:

Step	Action
15.	Click the scroll bar.



Oracle HR/Payroll - Add/Update Position Info

Job Information

\*Business Unit: 32100 - 032 Executive Administration  
 Job Code: 0519 - Planner IV  
 \*Reg/Temp: Regular  
 \*Regular Shift: Not Applicable  
 Title: Planner IV  
 \*Full/Part Time: Full-Time  
 Union Code:   
 Short Title: Planner 4

Work Location

\*Reg Region: USA - United States  
 Department: 1000 - Executive Admin  
 Location: 5002 - 5002 - 12451 Twinkle Toes Cir  
 Reports To: 00005248 - Planner V  
 Supervisor Lvl:   
 Company: T32 - CMPY Texas Baseline Agency 032  
 Dot-Line:   
 Security Clearance:   
 Detailed Position Description

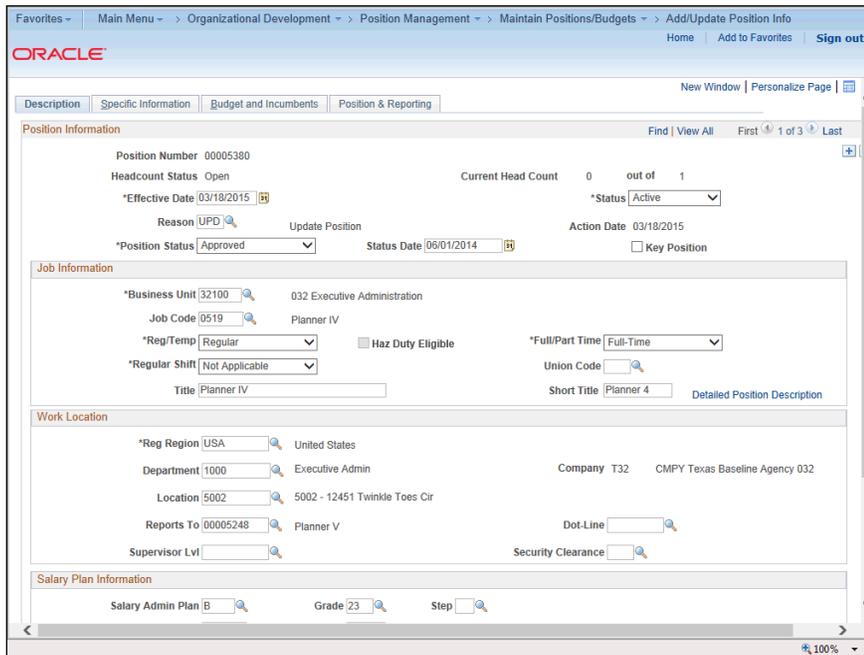
Salary Plan Information

Salary Admin Plan: B  
 Grade: 23  
 Step:   
 Standard Hours: 40.00  
 Work Period: Weekly  
 Mon: 8.00, Tue: 8.00, Wed: 8.00, Thu: 8.00, Fri: 8.00, Sat: , Sun:

Updated on 03/18/2015 2:12:15PM  
 Updated By TX\_HR\_UPD\_MAINTAIN\_POSITIONReplacement Manager Change1

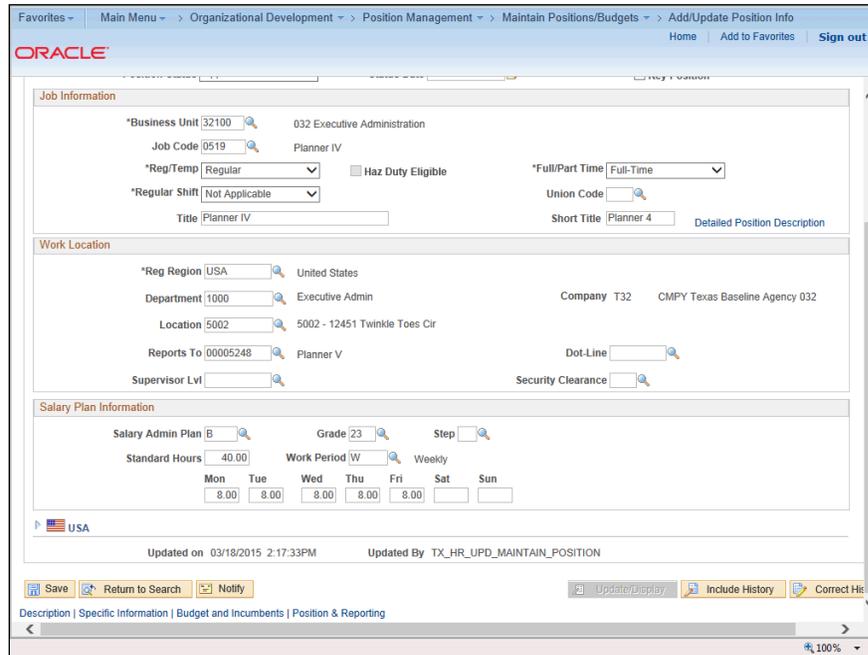
Buttons: Save, Return to Search, Notify, Update/Display, Include History, Correct Hi

Step	Action
16.	Click the <b>Save</b> button. 
17.	You have successfully inserted a new effective dated row with the new location information.



The screenshot shows the Oracle HR/Payroll Position Management interface. The breadcrumb trail is: Favorites > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info. The page title is "ORACLE" and "Add/Update Position Info". The "Position Information" section includes fields for Position Number (00005380), Headcount Status (Open), Current Head Count (0 out of 1), Effective Date (03/18/2015), Status (Active), Reason (UPD), Update Position, Position Status (Approved), Status Date (06/01/2014), and Action Date (03/18/2015). The "Job Information" section includes Business Unit (32100 - 032 Executive Administration), Job Code (0519 - Planner IV), Reg/Temp (Regular), Haz Duty Eligible, Full/Part Time (Full-Time), Regular Shift (Not Applicable), Title (Planner IV), and Short Title (Planner 4). The "Work Location" section includes Reg Region (USA - United States), Department (1000 - Executive Admin), Location (5002 - 5002 - 12451 Twinkle Toes Cir), Company (T32 - CMPY Texas Baseline Agency 032), Reports To (00005248 - Planner V), Supervisor Lvl, and Security Clearance. The "Salary Plan Information" section includes Salary Admin Plan (B), Grade (23), and Step.

Step	Action
18.	Click scroll bar.



Oracle HR/Payroll System - Add/Update Position Info

**Job Information**

\*Business Unit: 32100 032 Executive Administration  
 Job Code: 0519 Planner IV  
 \*Reg/Temp: Regular  Haz Duty Eligible  
 \*Full/Part Time: Full-Time  
 \*Regular Shift: Not Applicable  
 Union Code:   
 Title: Planner IV Short Title: Planner 4 Detailed Position Description

**Work Location**

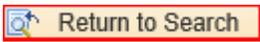
\*Reg Region: USA United States  
 Department: 1000 Executive Admin Company: T32 CMPY Texas Baseline Agency 032  
 Location: 5002 5002 - 12451 Twinkle Toes Cir  
 Reports To: 00005248 Planner V Dot-Line:   
 Supervisor Lvl:  Security Clearance:

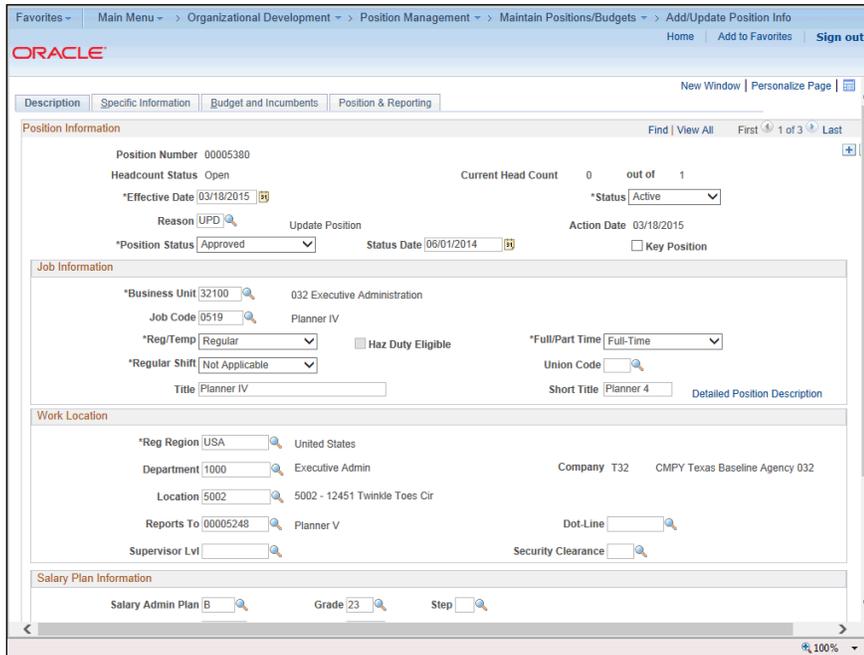
**Salary Plan Information**

Salary Admin Plan: B Grade: 23 Step:   
 Standard Hours: 40.00 Work Period: Weekly  
 Mon: 8.00 Tue: 8.00 Wed: 8.00 Thu: 8.00 Fri: 8.00 Sat:  Sun:

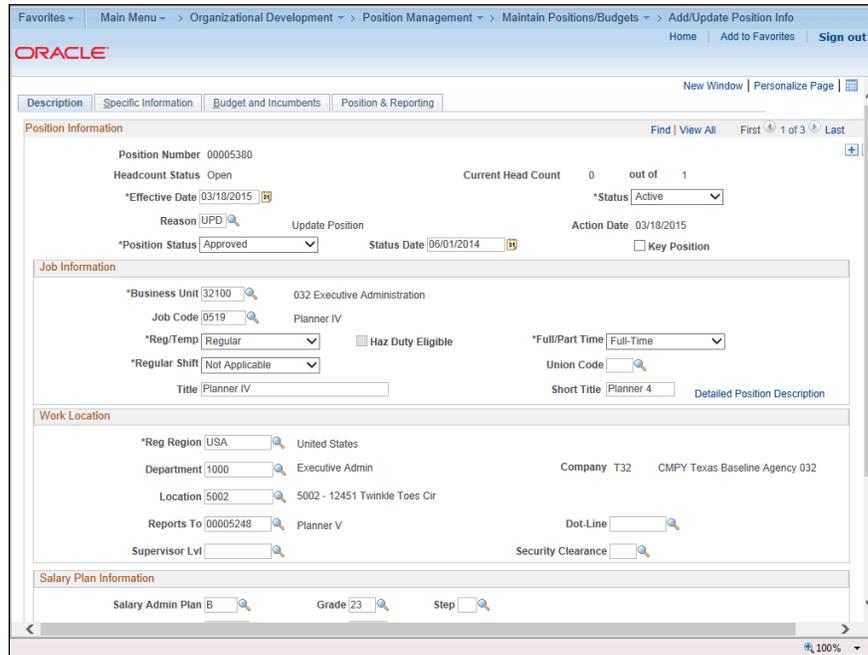
Updated on: 03/18/2015 2:17:33PM Updated By: TX\_HR\_UPD\_MAINTAIN\_POSITION

Buttons: Save, Return to Search, Notify, Update/Display, Include History, Correct History

Step	Action
19.	Click the <b>Return to Search</b> button. 
20.	The position record has been updated, however, you realize the location number should have been entered as <b>5003</b> (125 E. Apple Pie Rd) instead of <b>5002</b> (12451 Twinkle Toes Cir.)  Let's reaccess that position number ( <b>00005380</b> ) to make the correction.
21.	Enter the desired information into the <b>Position Number</b> field. Enter " <b>00005380</b> ". <b>Position Number:</b>   begins with <input type="text"/>
22.	A mistake has been made but it is not necessary to insert a new row to correct the mistake, nor is it necessary to delete the row because it's essentially correct.  Let's enable the ' <b>Correct History</b> ' checkbox.
23.	Click the <b>Correct History</b> option. <input type="checkbox"/> <b>Correct History</b>
24.	Click the <b>Search</b> button. <input type="button" value="Search"/>



Step	Action
25.	Click scroll bar.
26.	To make changes to current or historical rows of data, the <b>Correct History</b> button must be grayed to indicate correction mode is active.
27.	Click scroll bar
28.	Ensure you have accessed the correct effective dated row before proceeding to make the changes.  In this example, this is the correct effective-dated row.
29.	Change the location information to the correct location.  <b>Warning:</b> Correcting position data overwrites any previous information for that effective dated row



Step	Action
30.	Click the <b>Look up Location (Alt+5)</b> button. 
31.	Click the <b>5003 - 125 E Apple Pie Rd</b> link. <a href="#">5003 - 125 E Apple Pie Rd</a>

Oracle HR/Payroll Position Management interface showing details for Position Number 00005380. The form includes sections for Position Information, Job Information, Work Location, and Salary Plan Information. The Position Information section shows the position is Open, with an Effective Date of 03/18/2015 and a Status of Active. The Job Information section shows the Business Unit as 032 Executive Administration, Job Code as 0519 Planner IV, and Full/Part Time as Full-Time. The Work Location section shows the Reg Region as USA, Department as Executive Admin, and Location as 5003. The Salary Plan Information section shows the Salary Admin Plan as B, Grade as 23, and Step as 1.

Step	Action
32.	Click the scroll bar.

Oracle HR/Payroll Position Management interface showing details for Position Number 00005380. The form includes sections for Job Information, Work Location, and Salary Plan Information. The Job Information section shows the Business Unit as 032 Executive Administration, Job Code as 0519 Planner IV, and Full/Part Time as Full-Time. The Work Location section shows the Reg Region as USA, Department as Executive Admin, and Location as 5003. The Salary Plan Information section shows the Salary Admin Plan as B, Grade as 23, and Step as 1. The Standard Hours section shows 40.00 hours per week, and the Work Period section shows Weekly. The interface also displays the current date and time (03/18/2015 2:12:53PM) and the user (TX\_HR\_UPD\_MAINTAIN\_POSITION).

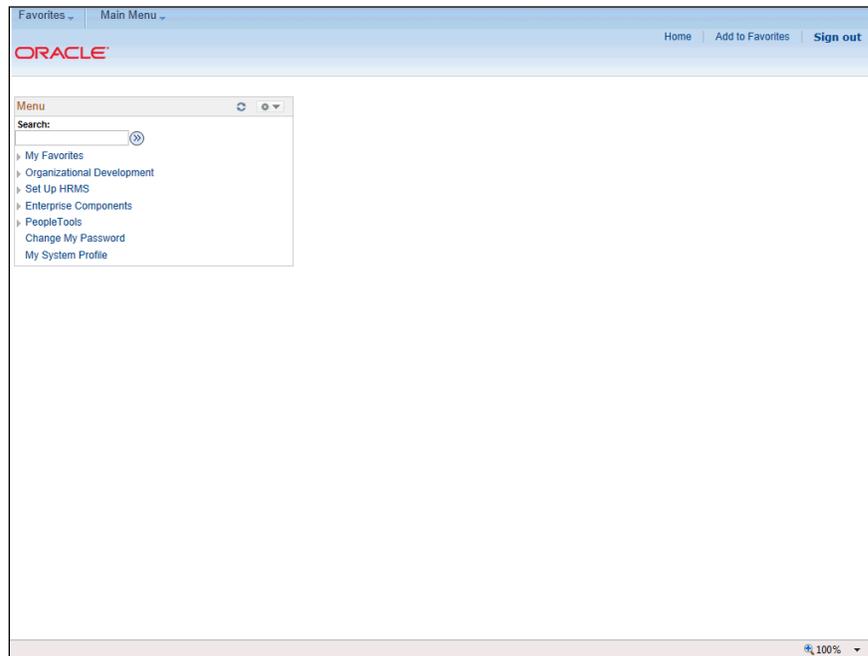
Step	Action
33.	Click the <b>Save</b> button. 
34.	Notice the new location has been corrected for the same effective-dated row.
35.	Congratulation! You have successfully completed this lesson. <b>End of Procedure.</b>

## Process a Reclassification

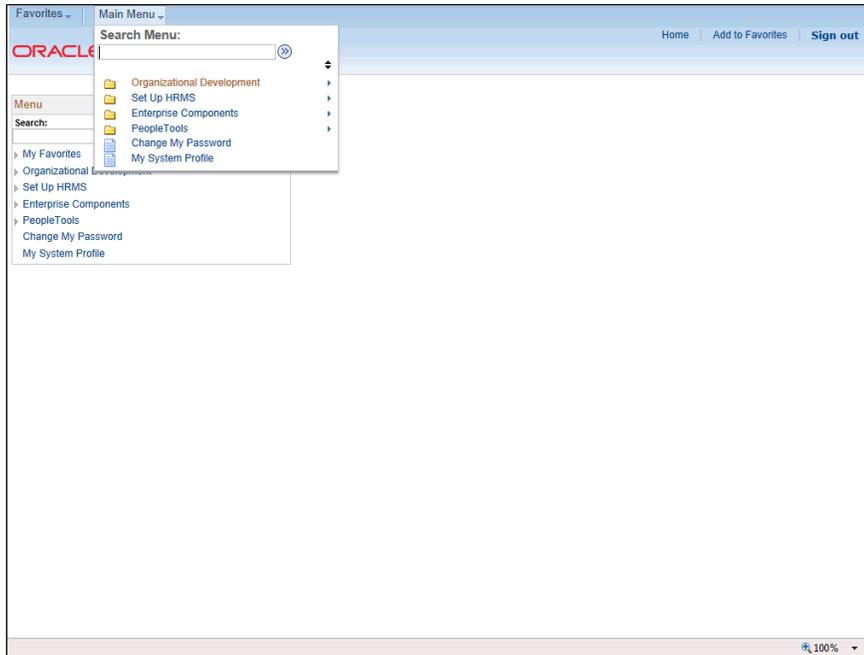
**Section 2, Lesson 1 Exercise - Scenario:** Reclassify a position and view the incumbents' job record updates linked to the position.

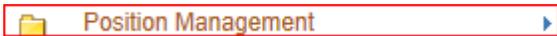
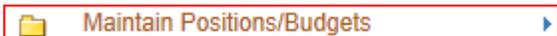
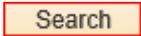
### Procedure

This lesson will focus on how to update a position for a reclassification.

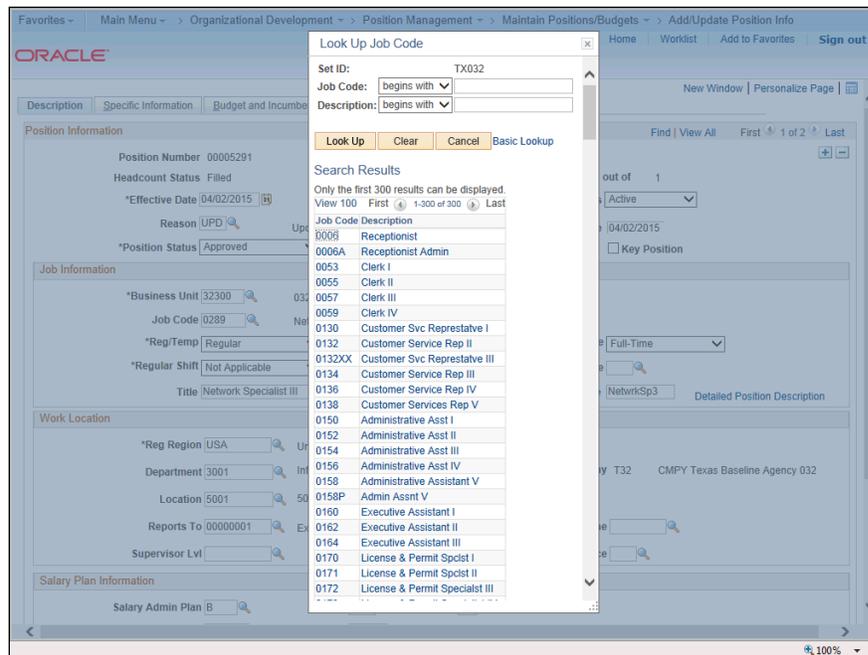


Step	Action
1.	Click the <b>Main Menu</b> link. 

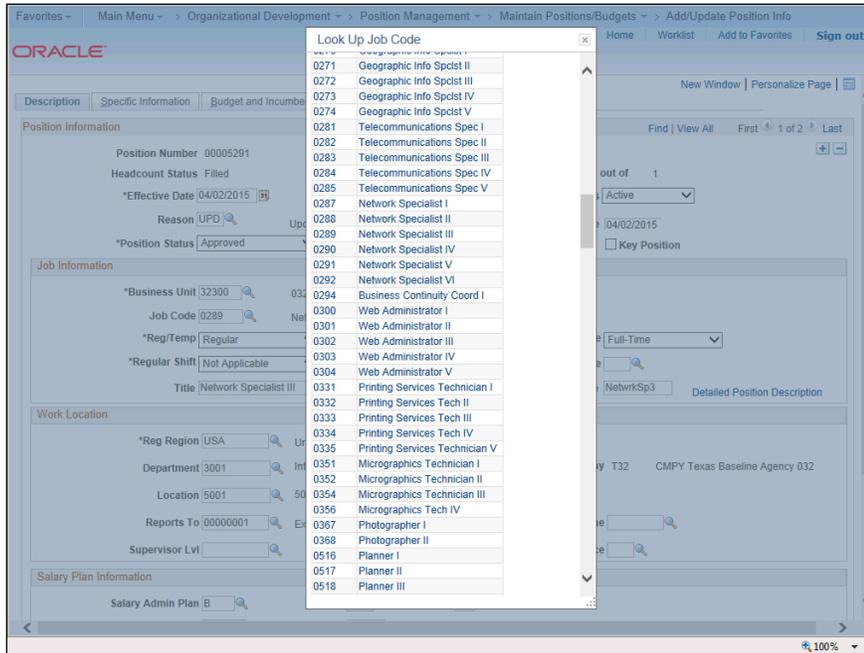


Step	Action
2.	Click the <b>Organizational Development</b> menu. 
3.	Click the <b>Position Management</b> menu. 
4.	Click the <b>Maintain Positions/Budgets</b> menu. 
5.	Point to the <b>Add/Update Position Info</b> menu. 
6.	A position requires a reclassification resulting in a job code change. This type of update requires information to be changed on both the Position Data and Job Data pages.  Let's start by making the update to the position-related job code.
7.	Enter the desired information into the <b>Position Number</b> field. Enter " <b>00005291</b> ". <b>Position Number:</b>   begins with ▼ 
8.	Click the <b>Search</b> button. 

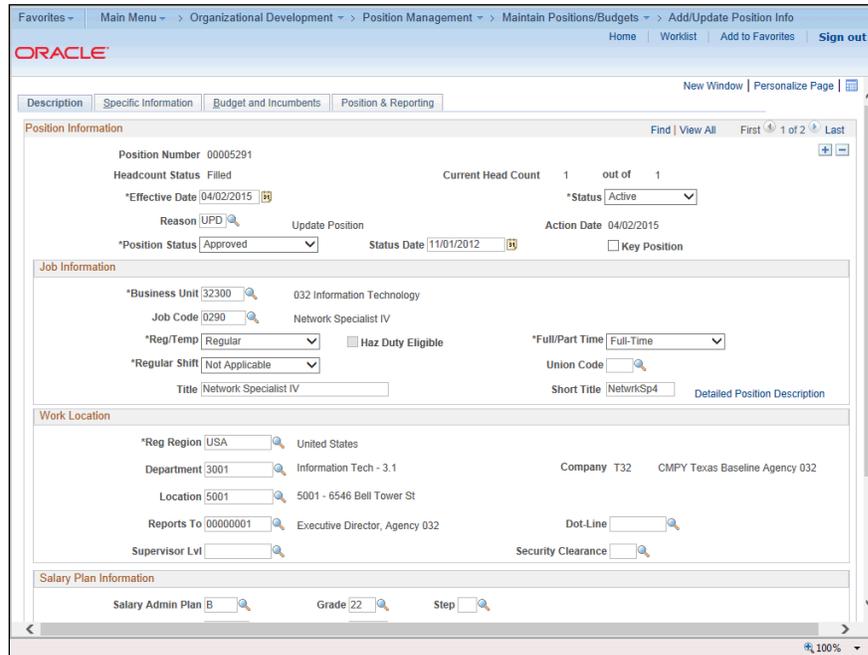
Step	Action
9.	Note the current <b>Job Code, Salary Plan</b> and <b>Grade</b> information for this position. This will be the primary information updated for this reclassification.
10.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
11.	The <b>Effective Date</b> has been updated to the system date which is the current date.  <b>Note:</b> This date will be needed by the HR User to when updating the incumbent Job Data.
12.	Click in the <b>Reason</b> field. <b>Reason</b> <input type="text"/>
13.	Enter the desired information into the <b>Reason</b> field. Enter " <b>UPD</b> ". <b>Reason</b> <input type="text"/>
14.	Click the <b>Look up Job Code (Alt+5)</b> button. 



Step	Action
15.	Click the scroll bar.



Step	Action
16.	Click the <b>Network Specialist IV</b> link. 
17.	The position job code has been changed from a Network Specialist III (0289) to a Network Specialist IV (0290).  <b>Note:</b> This type of change impacts the <b>Salary</b> and <b>Grade</b> of the position qualifying it as a 'pay impacting' change.
18.	Click the <b>Budget and Incumbents</b> tab. 
19.	Notify the HR User and give them the Employee ID, Position Number and Effective Date of the position that was reclassified. This information is needed to update the Job Data record.



**Position Information**

Position Number: 00005291  
 Headcount Status: Filled  
 Current Head Count: 1 out of 1  
 \*Effective Date: 04/02/2015  
 \*Status: Active  
 Reason: UPD  
 Update Position  
 Action Date: 04/02/2015  
 \*Position Status: Approved  
 Status Date: 11/01/2012  
 Key Position

**Job Information**

\*Business Unit: 32300 032 Information Technology  
 Job Code: 0290 Network Specialist IV  
 \*Reg/Temp: Regular  Haz Duty Eligible  
 \*Full/Part Time: Full-Time  
 \*Regular Shift: Not Applicable  
 Union Code:  
 Title: Network Specialist IV  
 Short Title: NetwrkSp4 Detailed Position Description

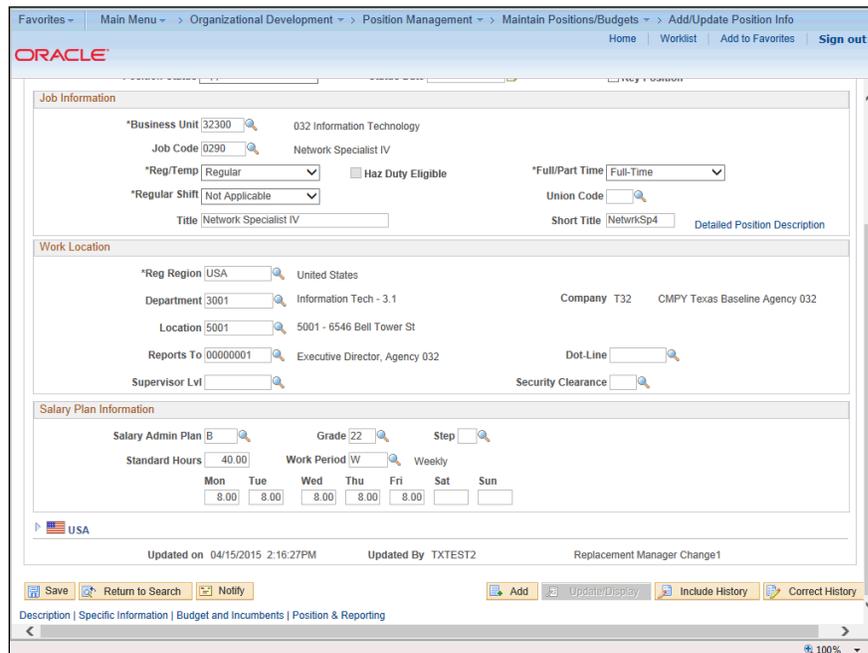
**Work Location**

\*Reg Region: USA United States  
 Department: 3001 Information Tech - 3.1  
 Company: T32 CMPY Texas Baseline Agency 032  
 Location: 5001 5001 - 6546 Bell Tower St  
 Reports To: 00000001 Executive Director, Agency 032  
 Dot-Line:  
 Supervisor Lvl:  
 Security Clearance:

**Salary Plan Information**

Salary Admin Plan: B  
 Grade: 22  
 Step:

Step	Action
20.	Click the scroll bar.



**Job Information**

\*Business Unit: 32300 032 Information Technology  
 Job Code: 0290 Network Specialist IV  
 \*Reg/Temp: Regular  Haz Duty Eligible  
 \*Full/Part Time: Full-Time  
 \*Regular Shift: Not Applicable  
 Union Code:  
 Title: Network Specialist IV  
 Short Title: NetwrkSp4 Detailed Position Description

**Work Location**

\*Reg Region: USA United States  
 Department: 3001 Information Tech - 3.1  
 Company: T32 CMPY Texas Baseline Agency 032  
 Location: 5001 5001 - 6546 Bell Tower St  
 Reports To: 00000001 Executive Director, Agency 032  
 Dot-Line:  
 Supervisor Lvl:  
 Security Clearance:

**Salary Plan Information**

Salary Admin Plan: B  
 Grade: 22  
 Step:  
 Standard Hours: 40.00  
 Work Period: W Weekly  

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.00	8.00	8.00	8.00	8.00		

Updated on: 04/15/2015 2:16:27PM  
 Updated By: TXTEST2  
 Replacement Manager Change1

Save Return to Search Notify Add Update/Display Include History Correct History

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Step	Action
21.	Click the <b>Save</b> button. 
22.	Clicking the <b>Save</b> button causes CAPPS Position Management to validate the new information against the incumbents' job record and existing position data. The result of this validation may generate either a <b>warning</b> or an <b>error</b> message. <ul style="list-style-type: none"> <li>• A <b>warning message</b> alerts of a potential data entry error or change. However, it allows the updates to be saved, if desired.</li> <li>• An <b>error message</b> stops the process due to data entry or process error. It requires the user to correct the problem before continuing.</li> </ul> In this example, a warning message was generated to prompt the user to review the Commitment Accounting Budget record and update funding or chart fields as required for payroll distribution.
23.	Click the <b>OK</b> button. 
24.	Multiple <b>warning</b> and <b>error</b> messages may appear based on the information that requires validation. <p>In this example, a warning message was generated to inform the user that updates will not be <u>automatically</u> made to the incumbent Job Data. The update in our example was made to <b>'pay impacting'</b> data, so the incumbents job data must be maintained accordingly.</p>
25.	Click the <b>OK</b> button. 
26.	This position reclassification is <b>'pay impacting'</b> due to the change in the job code. <p>Next, it will require an update to the incumbents job data record. <u>The POS User must notify the HR User of the change to Position Data.</u></p> <p>The HR User must now update the incumbents Job Data record with this new information.</p> <p>Let's take a look at the fields the HR User must update on the incumbents Job Data.</p>
27.	Position and Job Data Changes

Step	Action
28.	<p>HR must update the following fields on the Job Data page for the position incumbent :</p> <p><b>Effective Date</b></p> <p><b>Action / Reason</b></p> <p><b>Override Position Data</b></p> <p><b>Job Code</b></p> <p><b>Compensation Rate</b></p> <p>Let's take a look at these fields on the Job Data pages.</p>
29.	The <b>Effective Date</b> must match the Effective Dated row on the Position Data page.
30.	<b>Override Position Data</b> enables the HR User to update position-related data.
31.	The <b>Action</b> and <b>Reason Code</b> will be updated with the appropriate value.
32.	The <b>Job Code</b> field to match the update made to the Position Data.
33.	The <b>Compensation Rate</b> will also be updated.
34.	After the notification has gone to the HR User, the POS User may run the <b>Audit-Position Exceptions Report</b> to ensure the update has been completed. The report is also used to identify any other position-related discrepancies between Position Data and Job Data.
35.	<p>Congratulations! You have successfully completed this lesson.</p> <p><b>End of Procedure.</b></p>

## Section 3 - Position Workflow

### Maintain Reports To Relationship

**Section 3, Lesson 1 Exercise - Scenario:** Update the 'Reports To' position on an existing position

**Note:** CAPPS Position Management provides automatic reporting structure changes when a manager position is vacant:

- For Managers/Incumbents: The *Reports To* field is automatically updated for manager vacant position to the next level up within the reporting structure. It will also automatically roll-down when the vacant manager position is filled.

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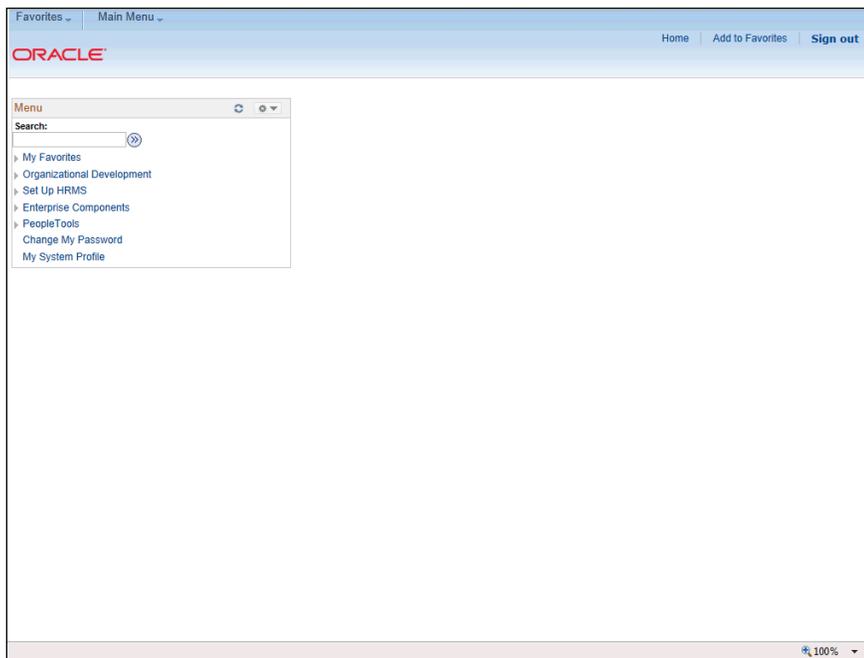
## EUT Course



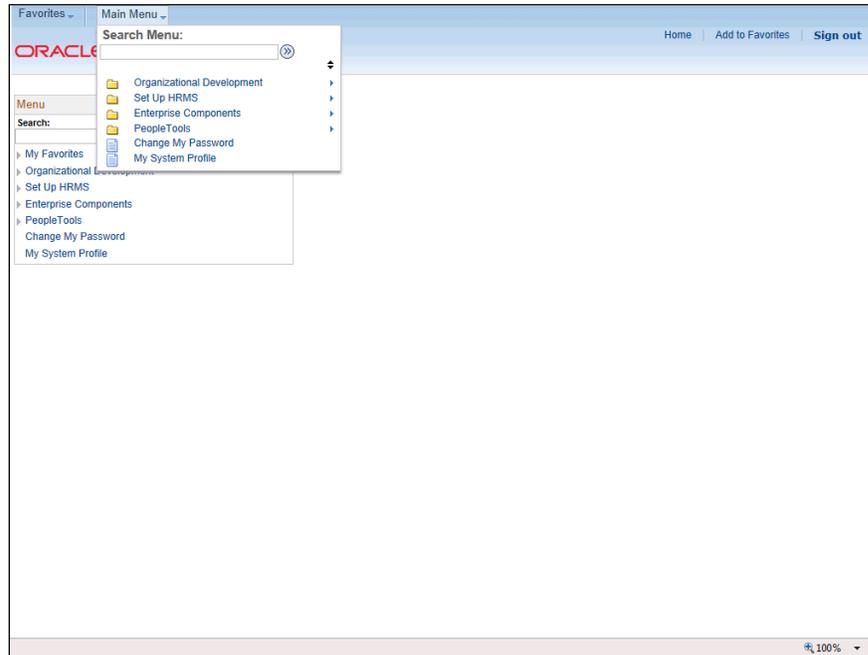
- For Non-Employees (Contingent Workers): The *Reports To* field is assigned in Position Data. The roll-up and roll-down functionality is not applicable to Contingent Workers. The non-employee's position must be updated manually.

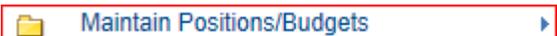
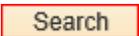
### Procedure

This lesson will focus on maintaining the reporting structure among positions.

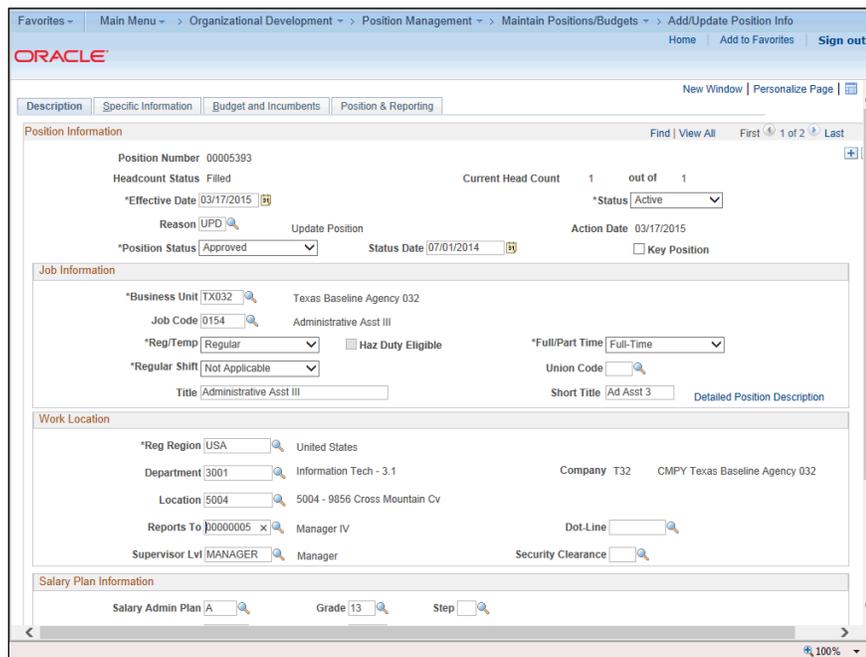


Step	Action
1.	Click the <b>Main Menu</b> option. 



Step	Action
2.	Click the <b>Organizational Development</b> menu. 
3.	Click the <b>Position Management</b> menu. 
4.	Click the <b>Maintain Positions/Budgets</b> menu. 
5.	Click the <b>Add/Update Position Info</b> menu. 
6.	Enter the desired information into the <b>Position Number</b> field. Enter " <b>00005393</b> ". Position Number:   begins with ▼   
7.	Click the <b>Search</b> button. 
8.	Use this <b>Description</b> page to change the <b>Reports To</b> field. To do this, first insert a new row.
9.	Click the <b>Add (+) a new row</b> button. 

Step	Action
10.	Use the <b>Effective Date</b> field to specify the date of the <b>Reports To</b> relationship change. It defaults to the current system date, but it can be changed to a future date, if needed. In this example, use the default date.
11.	Specify the reason for modifying the record in the <b>Reason</b> field.  Click the <b>Look up</b> button. 
12.	Click the <b>UPD Update Position</b> link. 
13.	Next, update the <b>Reports To</b> field to reflect the position reporting relationship change.
14.	Click the <b>Look up</b> button. 
15.	Select <b>00000005 - Manager IV</b> position number. 
16.	Notice the <b>Reports To</b> position description has been updated to a Manager IV.



The screenshot displays the Oracle HR/Payroll system interface for 'Add/Update Position Info'. The breadcrumb trail is: Favorites > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info. The page includes navigation links for Home, Add to Favorites, and Sign out.

**Position Information:**

- Position Number: 00005393
- Headcount Status: Filled
- Current Head Count: 1 out of 1
- \*Effective Date: 03/17/2015
- \*Status: Active
- Reason: UPD
- Update Position
- Action Date: 03/17/2015
- \*Position Status: Approved
- Status Date: 07/01/2014
- Key Position

**Job Information:**

- \*Business Unit: TX032 Texas Baseline Agency 032
- Job Code: 0154 Administrative Asst III
- \*Reg/Temp: Regular  Haz Duty Eligible
- \*Full/Part Time: Full-Time
- \*Regular Shift: Not Applicable
- Union Code:
- Title: Administrative Asst III
- Short Title: Ad Asst 3
- Detailed Position Description

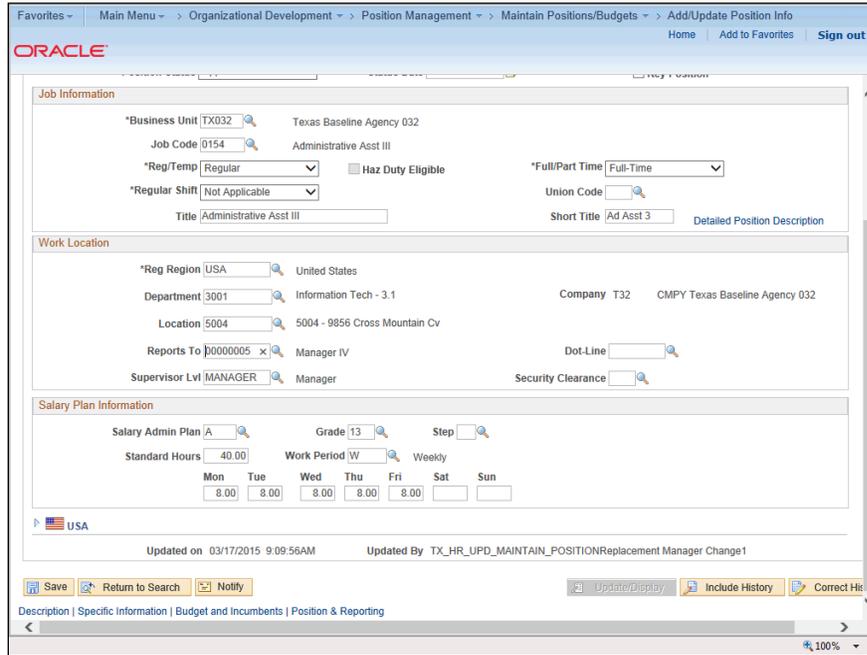
**Work Location:**

- \*Reg Region: USA United States
- Department: 3001 Information Tech - 3.1
- Company: T32 CMPY Texas Baseline Agency 032
- Location: 5004 5004 - 9856 Cross Mountain Cv
- Reports To: 00000005 Manager IV
- Dot-Line:
- Supervisor Lvl: MANAGER Manager
- Security Clearance:

**Salary Plan Information:**

- Salary Admin Plan: A
- Grade: 13
- Step:

Step	Action
17.	Click the scroll bar.



Step	Action
18.	Click the <b>Save</b> button.  <b>Save</b>
19.	Let's take a look at how this update has impacted the incumbents Job Data.

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## EUT Course



[Favorites](#) > [Main Menu](#) > [Organizational Development](#) > [Position Management](#) > [Maintain Positions/Budgets](#) > [Add/Update Position Info](#)

[Home](#) | [Add to Favorites](#) | [Sign out](#)

**ORACLE**

**Job Information**

\*Business Unit TX032 Texas Baseline Agency 032  
 Job Code 0154 Administrative Asst III  
 \*Reg/Temp Regular  Haz Duty Eligible \*Full/Part Time Full-Time  
 \*Regular Shift Not Applicable Union Code  
 Title Administrative Asst III Short Title Ad Asst 3 Detailed Position Description

**Work Location**

\*Reg Region USA United States  
 Department 3001 Information Tech - 3.1 Company T32 CMPY Texas Baseline Agency 032  
 Location 5004 5004 - 9856 Cross Mountain Cv  
 Reports To 00000005 Manager IV Dot-Line  
 Supervisor Lvl MANAGER Manager Security Clearance

**Salary Plan Information**

Salary Admin Plan A Grade 13 Step  
 Standard Hours 40.00 Work Period W Weekly  
 Mon Tue Wed Thu Fri Sat Sun  
 8.00 8.00 8.00 8.00 8.00

Updated on 03/17/2015 9:10:34AM Updated By TX\_HR\_UPD\_MAINTAIN\_POSITIONReplacement Manager Change1

[Save](#) [Return to Search](#) [Notify](#) [Update/Display](#) [Include History](#) [Correct HR](#)

[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [Position & Reporting](#)

Step	Action
20.	Click the scroll bar.

[Favorites](#) > [Main Menu](#) > [Organizational Development](#) > [Position Management](#) > [Maintain Positions/Budgets](#) > [Add/Update Position Info](#)

[Home](#) | [Add to Favorites](#) | [Sign out](#)

**ORACLE**

[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [Position & Reporting](#)

[New Window](#) | [Personalize Page](#)

**Position Information**

Position Number 00005393 Find | View All First 1 of 2 Last  
 Headcount Status Filled Current Head Count 1 out of 1  
 \*Effective Date 03/17/2015 \*Status Active  
 Reason UPD Update Position Action Date 03/17/2015  
 \*Position Status Approved Status Date 07/01/2014  Key Position

**Job Information**

\*Business Unit TX032 Texas Baseline Agency 032  
 Job Code 0154 Administrative Asst III  
 \*Reg/Temp Regular  Haz Duty Eligible \*Full/Part Time Full-Time  
 \*Regular Shift Not Applicable Union Code  
 Title Administrative Asst III Short Title Ad Asst 3 Detailed Position Description

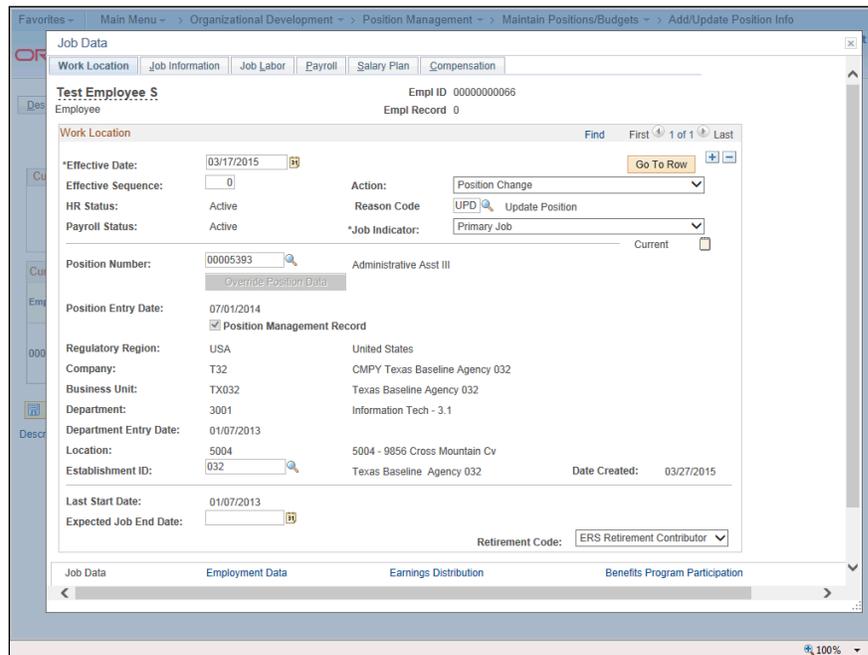
**Work Location**

\*Reg Region USA United States  
 Department 3001 Information Tech - 3.1 Company T32 CMPY Texas Baseline Agency 032  
 Location 5004 5004 - 9856 Cross Mountain Cv  
 Reports To 00000005 Manager IV Dot-Line  
 Supervisor Lvl MANAGER Manager Security Clearance

**Salary Plan Information**

Salary Admin Plan A Grade 13 Step

Step	Action
21.	Click the <b>Budget and Incumbents</b> tab. 
22.	Notice the <b>Position Data - Budget and Incumbents</b> page displays the update as it appears on the incumbents current job record.  Next, let's take a look at the impact on a Job Data record when a Manager position has become vacant.
23.	This is an example of a job record that has been impacted by a vacated manager position.  <b>Automated 'Reports To' Change:</b> When a management position becomes vacant, incumbents (excluding Contingent workers) that <b>Report To</b> that position are rolled up to the next level manager.  This automatic process happens nightly. It inserts a new row on the incumbent job record with a specific <b>Action/Reason Code</b> .  <b>Note:</b> This automated process does not apply to non-employees (Contingent workers). Their job records may be updated by a Core user, as needed.

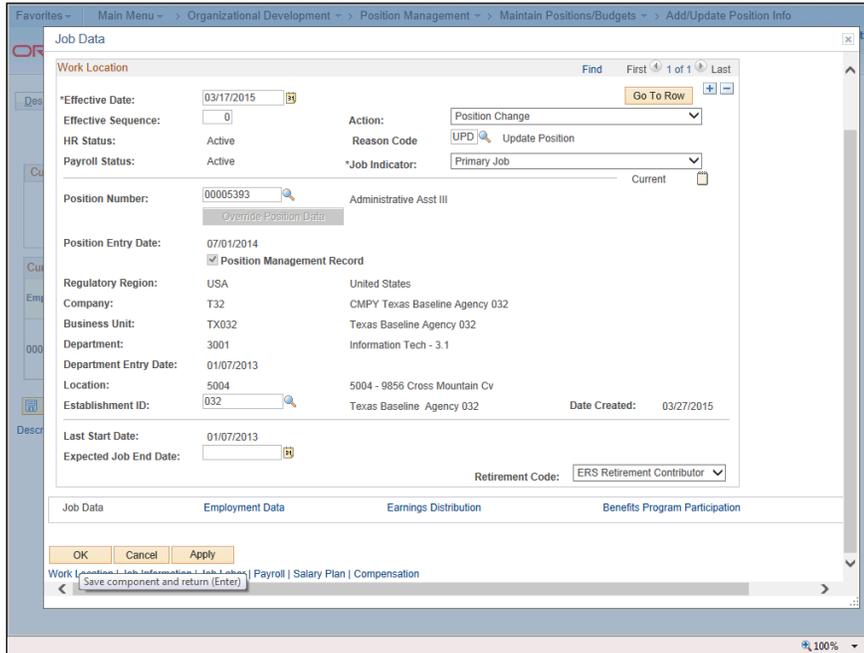


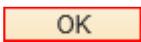
The screenshot shows the 'Job Data' form for 'Test Employee S' (Empl ID: 00000000056, Empl Record: 0). The form is divided into several sections:

- Work Location:** Includes fields for Effective Date (03/17/2015), Effective Sequence (0), HR Status (Active), Payroll Status (Active), Action (Position Change), Reason Code (UPD), and Job Indicator (Primary Job).
- Position Information:** Includes Position Number (00005393), Position Entry Date (07/01/2014), and Position Management Record (checked).
- Organizational Data:** Includes Regulatory Region (USA), Company (T32), Business Unit (TX032), Department (3001), and Location (5004).
- Additional Fields:** Includes Last Start Date (01/07/2013), Expected Job End Date, and Retirement Code (ERS Retirement Contributor).

The form also features a 'Go To Row' button and a 'Find' search bar.

Step	Action
24.	Click the scroll bar.



Step	Action
25.	Click the <b>OK</b> button. 
26.	Congratulations! You have successfully completed this lesson. <b>End of Procedure.</b>

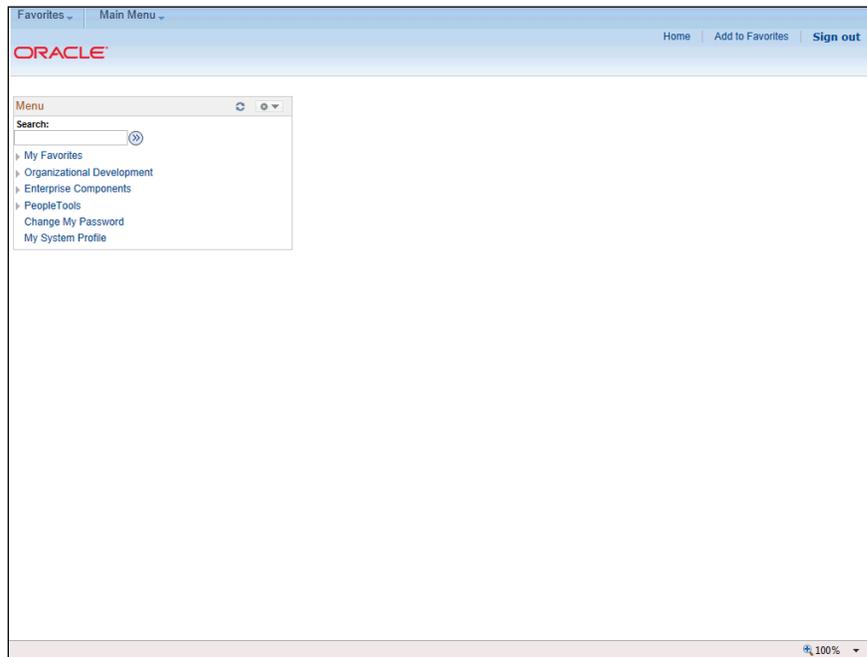
## Section 4 - Reports & Queries

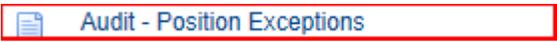
### Audit Exception Positions Report

#### Section 4, Lesson 1 Exercise - Scenario: Run an Audit Exception Positions Report Procedure

This lesson will focus on running the CAPPS Position Management **Audit Exception Position** report.

Step	Action
1.	<p>The <b>Audit - Position Exceptions</b> report displays discrepancies between position-related data and incumbent job data.</p> <p>This exercise will walk through the steps to run this report.</p>



Step	Action
2.	<p>Click the <b>Main Menu</b> button.</p> 
3.	<p>Click the <b>Organizational Development</b> menu.</p> 
4.	<p>Click the <b>Position Management</b> menu.</p> 
5.	<p>Click the <b>CAPPS Reports</b> menu.</p> 
6.	<p>Click the <b>Audit - Position Exceptions</b> menu.</p> 

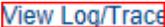
Step	Action
7.	<p><b>Run Control IDs</b> are used to run system processes.</p> <p>A <b>Run Control ID</b> is an identifier that, along with an User ID, uniquely identifies the process running. The <b>Run Control ID</b> provides information used when the process is run.</p> <p>Special characters are not allowed with the exception of the underscore ('_').</p>
8.	<p>Run Control IDs are stored by User ID. However, we suggest that you add your initials on the Run Control ID in the event that the Production Support needs to assist with a possible issue.</p>
9.	<p>If you have set up a Run Control ID, you can search for it using <b>Find an Existing Value</b>. If this is the first time to run this particular process, you can <b>Add a New Value</b>.</p>
10.	<p>Click the <b>Add a New Value</b> tab.</p> 
11.	<p>Enter the desired information into the <b>Run Control ID</b> field. Enter "<b>Test</b>".</p> 
12.	<p>Click the <b>Add</b> button.</p> 
13.	<p>Click the <b>Report Version</b> drop down list.</p> 
14.	<p>The <b>Report Version</b> lists the available reporting options.</p>
15.	<p>Click the <b>Agency</b> list item.</p> 
16.	<p>Click the <b>Choose a date</b> button.</p> 
17.	<p>Click the number <b>4</b></p> 
18.	<p>The Report Request parameters can be saved in one of two ways.</p> <p>(1) Click on <b>Save</b> and not run the process; this is useful when you want to change the way you will run a regularly scheduled job.</p> <p>(2) Click on <b>Run</b>. The <b>Run Control ID</b> will be saved with the information on the screen, and the process will be run.</p>

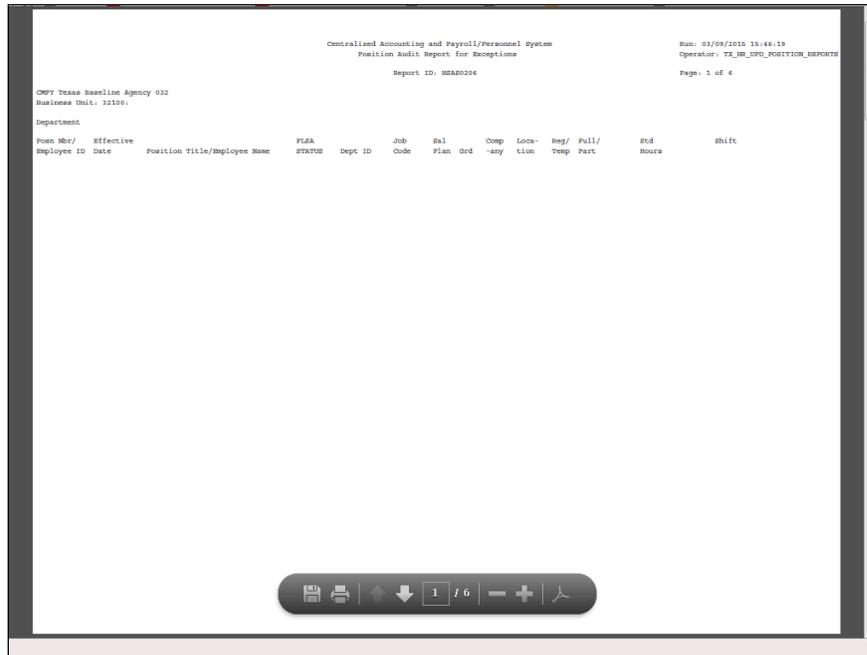
Step	Action
19.	Click the <b>Run</b> button. 
20.	Use the <b>Process Scheduler Request</b> page to enter or update parameters, such as report output type and format.  For this report, no information needs to be updated.
21.	The <b>Description</b> field helps to uniquely identify a process.
22.	The <b>Process Name</b> field displays the name of the process as it appears in the technical definition.
23.	The <b>Process Type</b> field displays the type of process, such as SQR Report, BI Publisher and so on.
24.	Use the <b>Type</b> field to select the type of output to generate for this job. The choices are File, Printer or Web.  <b>File:</b> Writes the output to a file that will appear in an Output Destination specified by the user.  <b>Printer:</b> You can enter a custom printer location if you have the appropriate security access.  <b>Web:</b> Sends all output of the process to the report repository, including log and trace files.
25.	Use the <b>Format</b> field to define the output format for the report. The available format is PDF.
26.	Click the <b>OK</b> button. 
27.	The report is now running. Notice that the report has been assigned a <b>Process Instance</b> number. Make a note of this number for future tracking of this report.
28.	Process Scheduler is used to run reports, <b>Process Monitor</b> to monitor the status of the report.  <b>Process Monitor</b> is used to: <ul style="list-style-type: none"><li>• Check the status of submitted process requests.</li><li>• Cancel process requests that have been initiated or are currently processing.</li><li>• Hold process requests that are queued, and queue process requests you have put on hold.</li></ul> Click the <b>Process Monitor</b> link. 

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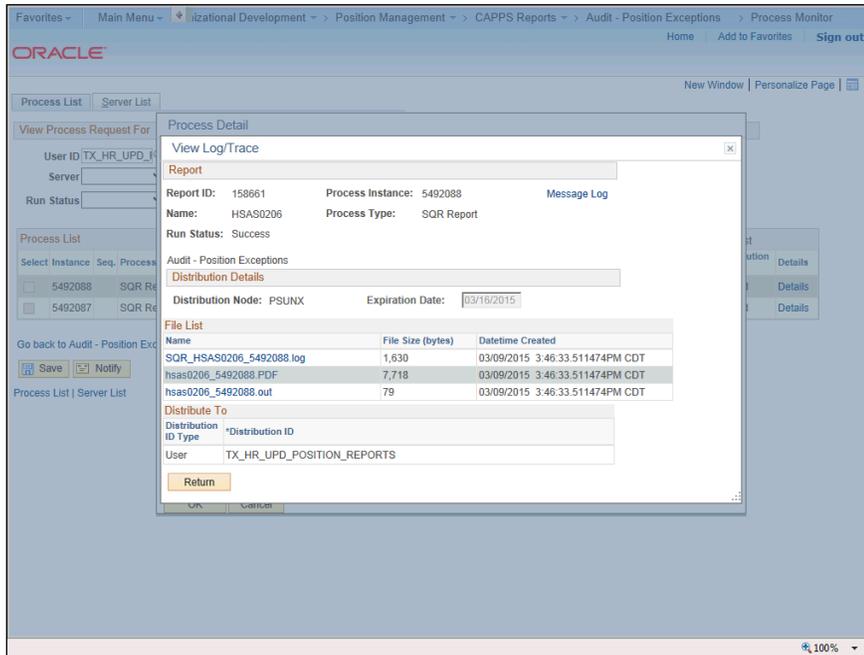
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Step	Action
29.	Process Monitor provides a <b>Process List</b> page to view the status of submitted report/process requests.
30.	The <b>Process List</b> group box lists all the requested processes for the user.
31.	The current <b>Run Status</b> of your process is Queued. The process will be finished when the Run Status is Success, and the Distribution Status is Posted. Continue to click the <b>Refresh</b> button until the screen shows Success and Posted.
32.	Click the <b>Refresh</b> button. 
33.	The Run Status is <b>Success</b> , and the Distribution Status is <b>Posted</b> . The process is complete and ready to view.
34.	Click the <b>Details</b> link. 
35.	Click the <b>View Log/Trace</b> link. 
36.	The output format for this report is a .PDF file. Click the <b>hsas0206_5492088.PDF</b> link. 
37.	The <b>Position Audit Report for Exceptions</b> is used as a tool to identify discrepancies and reconcile Position Data and Job Data records.



Step	Action
38.	Click the <b>Down Arrow</b> to view additional report pages. 
39.	The report is sorted by <b>Agency, Business Unit and Department ID</b> .
40.	The report lists two rows of data for a single Position and the incumbent. The top row is the Position Data and the bottom row is the incumbent's Job Data.
41.	The position-related information displayed on the two rows should match exactly, including the <b>Effective Date</b> .
42.	Notice in this example, the <b>Job Code</b> and the <b>Shift</b> information are different. To correct these discrepancies, the Position User would notify the HR User and they must confirm which record is accurate and then make the appropriate updates.



Step	Action
43.	<p>After the report has been viewed and/or printed, close the browser tab to return to the <b>View Log/Trace</b> page.</p> <p>Click the <b>Return</b> button.</p> <p><b>Return</b></p>
44.	<p>Click the <b>OK</b> button.</p> <p><b>OK</b></p>
45.	<p>Click the <b>Go back to Audit - Position Exceptions</b> link to run another report.</p> <p><b>Go back to Audit - Position Exceptions</b></p>
46.	<p>Congratulations! You have successfully completed this lesson.</p> <p><b>End of Procedure.</b></p>

### All Agency Position

#### Section 4, Lesson 2 Exercise - Scenario: Run the All Agency Positions query

The query includes the following information:

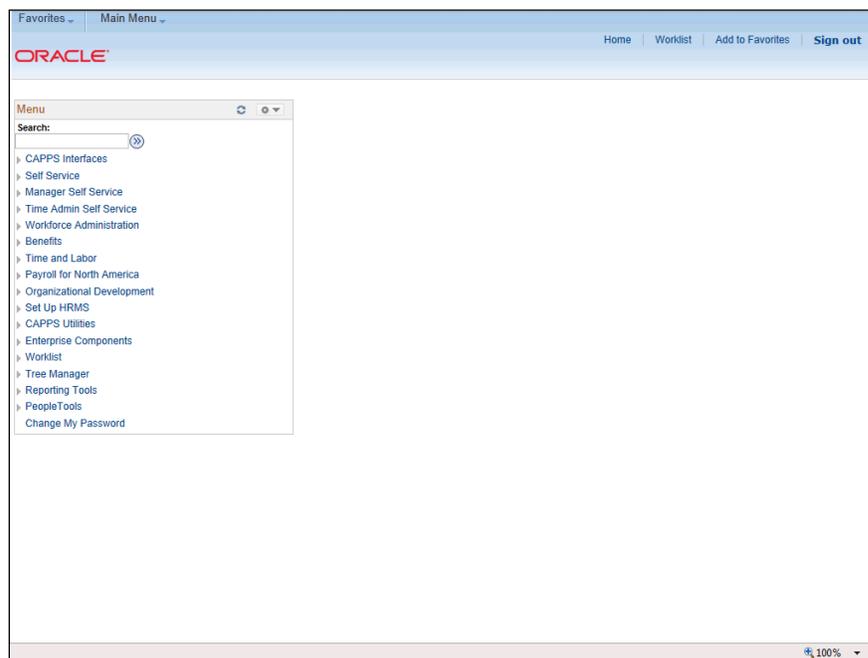
- Position Number
- Effective Date
- Description

- Business Unit
- Job Code
- Reports To
- Location
- Department ID

## Procedure

This lesson will focus on running the **All Agency Position** query using Query Viewer.

Step	Action
1.	<p><b>Note:</b> This CAPPS homepage is for training purposes only. Not all menu items shown will be seen in an Agency environment.</p> <p>Menu items seen on the CAPPS homepage will vary based on the users security role.</p>

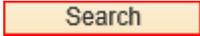


Step	Action
2.	<p>Click the <b>Main Menu</b> button.</p> <p><b>Main Menu</b></p>

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Step	Action
3.	Click the <b>Reporting Tools</b> menu. 
4.	Click the <b>Query</b> menu. 
5.	Click the <b>Query Viewer</b> menu. 
6.	Use the <b>Query Viewer</b> page to run the <b>All Agency Positions</b> query to view a list of current Agency positions.
7.	Enter the desired information into the <b>*Search By - begins with</b> field. Enter " <b>TX_HR_AGY_POSITION_ALL</b> ". 
8.	Click the <b>Search</b> button. 
9.	Queries meeting the entered criteria are displayed under <b>Search Results</b> . Notice that the query name <b>TX_HR_AGY_POSITION_ALL</b> appears in the list.
10.	Use the <b>Run to HTML</b> link in the query list to open a query in a new browser window.
11.	Use the <b>Run to Excel</b> link to download a query to an Excel spreadsheet.
12.	Use the <b>Run to XML</b> link to download query in XMLP format.
13.	Use the <b>Schedule</b> link to schedule a time for the query to run.
14.	Use the <b>Favorite</b> link to add a query to the Favorites menu.
15.	For this lesson, use the <b>Run to HTML</b> to see the query output. Click the <b>HTML</b> link. 
16.	The <b>All Agency Positions (TX_HR_AGY_POSITION_ALL)</b> query page opens in a new browser window.
17.	This output may be downloaded as an <b>Excel Spreadsheet, CSV Text File or XML File</b> for future reference.
18.	Congratulations! You have successfully completed this lesson. <b>End of Procedure.</b>

## All Agency Vacant Position

**Section 4, Lesson 3 Exercise - Scenario:** Run the All Agency Vacant Positions query

The query report lists the following information:

- Department ID
- Position Number
- Position Description
- Job Code
- Location
- Full/Part
- Reg/Temp
- Reports To
- Max Head Count
- Salary Plan
- Salary Step
- Salary Grade

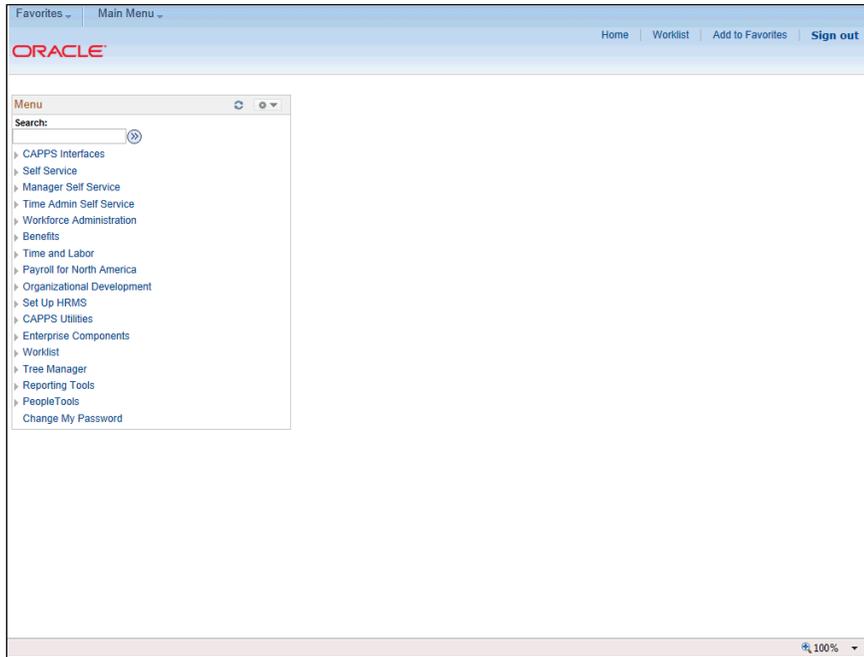
### Procedure

This lesson will focus on running the All Agency Vacant Positions query using Query Viewer.

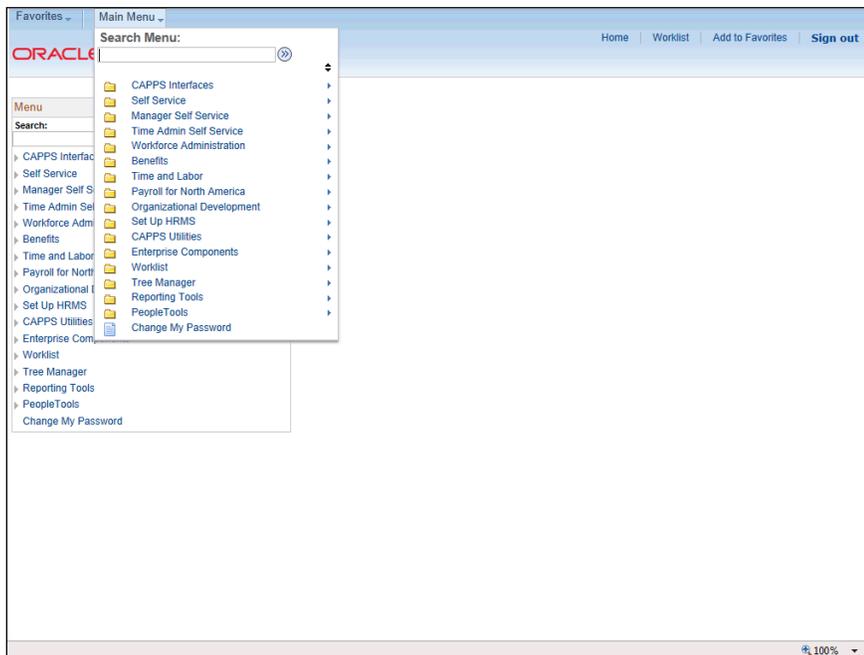
Step	Action
1.	<p><b>Note:</b> This CAPPS homepage is for training purposes only. Not all menu items shown will be seen in an Agency environment.</p> <p>Menu items seen on the CAPPS homepage will vary based on the users security role.</p>

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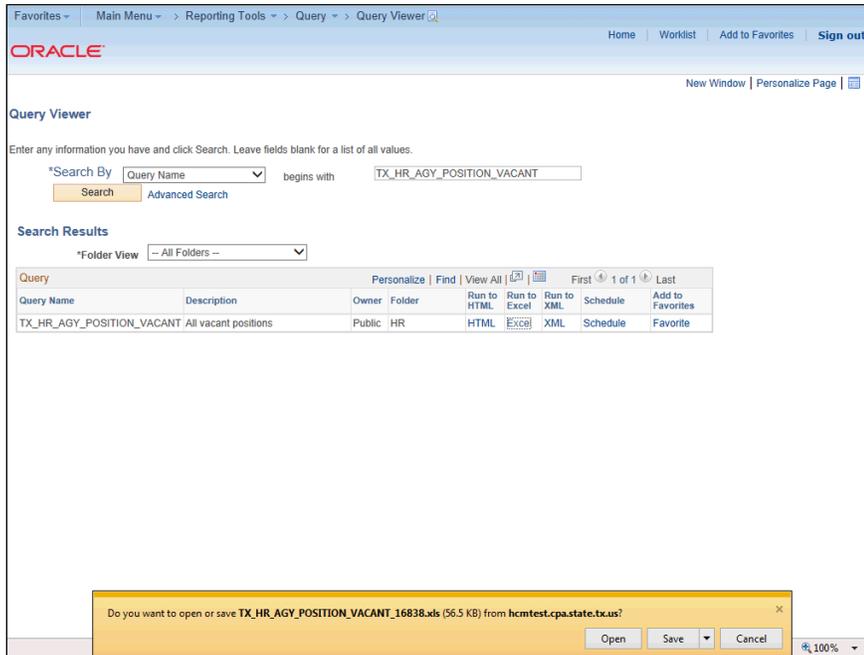
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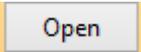


Step	Action
2.	Click the <b>Main Menu</b> button. 



Step	Action
3.	Click the <b>Reporting Tools</b> menu. 
4.	Click the <b>Query</b> menu. 
5.	Click the <b>Query Viewer</b> menu. 
6.	Use the <b>Query Viewer</b> page to run the <b>All Agency Vacant Position</b> query to view a list of current Agency positions.
7.	Enter the desired information into the <b>*Search By - begins with</b> field. Enter " <b>TX_HR_AGY_POSITION_VACANT</b> ". 
8.	Click the <b>Search</b> button. 
9.	Queries meeting the entered criteria are displayed under <b>Search Results</b> .  Notice that the query name <b>TX_HR_AGY_POSITION_VACANT</b> appears in the list.
10.	Use the <b>Run to HTML</b> link in the query list to open a query in a new browser window.
11.	Use the <b>Run to Excel</b> link to download a query to an Excel spreadsheet.
12.	Use the <b>Run to XML</b> link to download query in XMLP format.
13.	Use the <b>Schedule</b> link to schedule a time for the query to run.
14.	Use the <b>Favorite</b> link to add a query to the Favorites menu.
15.	For this lesson, use the <b>Run to Excel</b> to see the query output.  Click the <b>Excel</b> link. 
16.	A dialog box will appear asking the question: " <b>Do you want to open or save...?</b> " the Excel file. Next, select the desired function.



Step	Action
17.	Click the <b>Open</b> button. 
18.	The <b>TX_HR_AGY_POSITION_VACANT</b> query results open in a new sheet in Excel for review.
19.	Congratulations! You have successfully completed this lesson. <b>End of Procedure.</b>

## Glossary

### **Business Unit**

Business Unit is a business level between Company (Agency) and Department for reporting and operations.

A Business Unit value is typically the Agency Number appended with two additional characters (e.g., 30400).

### **Core User**

A Core User is a select agency user (a.k.a. Super User) with access to core CAPPS system functionality. This access is typically not available to self-service users.

### **Department**

A Department in CAPPS continues to identify an operational entity within an agency. Multiple departments can be organized by Business Unit, which is essential for system security as well as position and job information.

### **Error Message**

An error message stops the process due to data entry or process error. It requires the user to correct the problem before continuing.

### **HTML**

HTML stands for HyperText Markup Language. It is a text description language used for publishing content on an internet web site.

### **Query**

A Query is an interactive tool used to gather information or data from the CAPPS system. Queries are already formulated, and you run them when you need them. The answers are shown in a browser window; alternatively, you can download the data into an Excel spreadsheet.

### **Run Control ID**

A Run Control ID is an identifier that, when paired with a User ID, uniquely identifies a process that is running. The Run Control ID defines parameters or criteria that are used when running the process.

### **Warning Message**

A warning message alerts of a potential data entry error or change. It does, however, allow updates to be saved.

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### **XML**

XML stands for Extensible Markup Language. It is a text-based formatting language used to share data on internet and intranet web sites.

### **XMLP**

XMLP stands for XML Protocol, and is a standard being developed by the W3C (World Wide Web Consortium) for encapsulating XML.