

A banner with a blue and white abstract background featuring glowing circles and lines. The text is centered and reads:

CAPPS HR/PAYROLL
End-User Training (EUT)

EUT Course - 120
Position Management

PeopleSoft 9.2
October 2020

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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

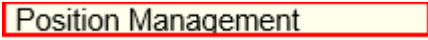
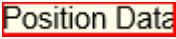





Add a Position









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

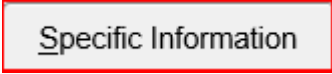


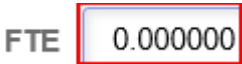


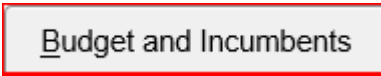
Procedure





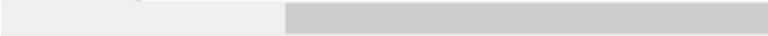

In this lesson, you will learn how to create a new position.

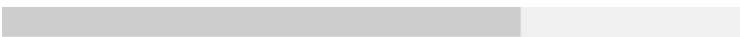
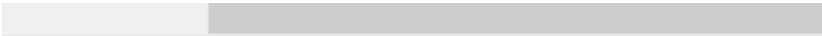
Step	Action
1.	Click the Employee Self Service button. 
2.	Click the Workforce Administration menu. 
3.	Click the HR Administration button. 

Step	Action
4.	Click the Position Management link. 
5.	Click the Position Data link. 
6.	Click the Activity Guide Navigation Area button. 
7.	CAPPS Position Management displays the Add/Update Position Info page. This page is used to add new positions as well as search for existing position information. Click the Add a New Value tab. 
8.	The system auto-generates position numbers upon saving the record.
9.	Click the Add button. 
10.	The Description page is used to enter Position, Job, Work Location and Salary Plan information of a position.
11.	A key field to understand when adding position information is the Effective Date . Effective Dates 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 Effective Date defaults to the system date which is the current date.
12.	The Reason code ' New ' will default because you selected that you were adding a New Value. Otherwise, you would select ' Update ' as the Reason.
13.	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 by selecting a Job Code .
14.	Click the Look up Job Code (Alt+5) button. 
15.	Click the 0164 - Executive Assnt III link. 

Step	Action
16.	Notice the default Job information that appears as it relates to the selected job code.
17.	The next step in creating a new position is to indicate the Work Location information.
18.	Click the scrollbar.
19.	Click the Look up Department (Alt+5) button. 
20.	Click the 1000 link. 
21.	To see the description of the Department value entered.
22.	<p>The Location may or may not populate based on the Department entered.</p> <p>Note: These fields may or may not populate based on information placed on the Location Table.</p> <p>Click the Look up Location (Alt+5) button. </p>
23.	Click the 111 CAPPS Way link. 
24.	<p>The Reports To field is used to build reporting relationships between positions.</p> <p>It can also be used to generate organizational reports in Position Management, such as the HR Management to Staff Ratio Report.</p> <p>Click the Look up Reports To (Alt+5) button. </p>
25.	Click the scrollbar.
26.	Click the 00005755 link. 
27.	Notice the Reports To field displays the new reports to position.
28.	<p>To meet the State Auditor's Office reporting requirements, the Supervisor Level field is also used to track reporting relationships among positions.</p> <p>Click the Look up Supervisor Lvl (Alt+5) button. </p>
29.	Click the NON-MGR link. 

Step	Action
30.	The Salary Plan information also populates from the Job Code that was entered.
31.	Click the scrollbar.
32.	Click the Specific Information tab. 
33.	Use the Specific Information page to enter information that is specific to the position. This page is also used to trigger incumbents position-related data changes.
34.	FTE tracking is located in the Education and Government section. Click the Expand section Education and Government button. 
35.	Click the scrollbar.
36.	Click the scrollbar. 
37.	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). Double-click in the FTE field. 
38.	Enter the desired information into the FTE field. Enter "1". 
39.	Click the Adds to FTE Actual Count option. 
40.	Click the scrollbar.
41.	The Update Incumbents checkbox is unchecked. Whenever someone is assigned to this position, this checkbox should be updated on the same date as the action in Job Data. You will see how this happens next.
42.	Click the Budget and Incumbents tab. 

Step	Action
43.	<p>After an employee has been assigned to this position, the Budget and Incumbents page can be used to view the incumbents Information.</p> <p>CAPPS Position Management will display the Current Incumbents information only.</p> <p>Note: An employee has not been assigned to the position so this information is currently blank.</p>
44.	<p>Click the Save button.</p> 
45.	A new position has been created with the Position Number of 00006291.
46.	<p>This position is now available for HR to assign to an employee.</p> <p>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.</p> <p>Let's walk through that update process.</p>
47.	<p>Click the Activity Navigator button.</p> 
48.	<p>Enter the desired information into the Position Number field. Enter "00006291".</p> <p>Position Number: <input type="text" value="begins with"/> <input type="text" value=""/></p>
49.	<p>Click the Search button.</p> 
50.	Click the scrollbar.
51.	<p>Click the Add a new row at row 1 (Alt+7) button.</p> 
52.	<p>Click the scrollbar.</p> 
53.	<p>The current date defaults but if it isn't the same date on the HR record, then you will change it.</p> <p>In this example, the HR record was entered on the current date, August 5, 2020.</p>
54.	<p>Click the Look up Reason (Alt+5) button.</p> 


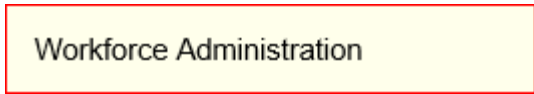
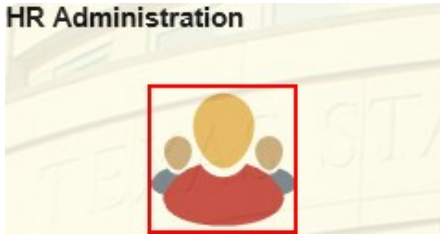
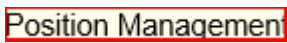

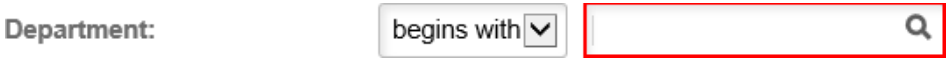
Step	Action
55.	<p>You are updating this Position not creating a New Position.</p> <p>Click the UPD link.</p> <p>UPD</p>
56.	<p>Click the Specific Information tab.</p> <p>Specific Information</p>
57.	<p>Click the scrollbar.</p>
58.	<p>Now the Update Incumbents checkbox is checked. This happens because it matches the date on the job data record where this position number was entered.</p>
59.	<p>You can view the employee information for the Incumbent assigned to this position.</p> <p>Click the Budget and Incumbents tab.</p> <p>Budget and Incumbents</p>
60.	<p>Click the scrollbar.</p>
61.	<p>Click the scrollbar.</p> 
62.	<p>You can also view the Job Data pages.</p> <p>Click the Job Data link.</p> <p>Job Data</p>
63.	<p>Click the Close button.</p> <p>✕</p>
64.	<p>Click the scrollbar.</p> 
65.	<p>Don't forget to Save the update.</p> <p>Click the Save button.</p> <p>Save</p>
66.	<p>Congratulations! You have completed this lesson.</p> <p>End of Procedure.</p>









Search for a Position

Section 1, Lesson 2 Exercise - Scenario: Search for an existing Position

Procedure

In this lesson, you will learn how to search for position information by **Department**, **Job Code** and **Report-To** information

Step	Action
1.	Click the Employee Self Service button. 
2.	Click the Workforce Administration menu. 
3.	Click the HR Administration button. 
4.	Click the Position Management link. 
5.	Click the Position Data link. 
6.	The Add/Update Position Info page provides several ways to search for an existing Position Number. Let's start with searching for an existing Position Number by Department .
7.	Click in the Department field. 
8.	Enter the desired information into the Department field. Enter " 3000 ". 

Step	Action
9.	Click the Search button. 
10.	Click the Activity Guide Navigation Area button. 
11.	Scroll down the page to see the Search Results. Click the scrollbar.
12.	The Search Results list the Positions that match the Department search criteria.
13.	Click the 00005918 link. 
14.	CAPPS retrieves the selected position information. You can scroll down the page to see the Department ID in the Work Location section. Note the Department ID matches the search criteria.
15.	Click the scrollbar.
16.	The Department ID field contains 3000 that was in the Search Criteria.
17.	Click the scrollbar.
18.	Click the Return to Search button. 
19.	To begin a new search, Click the Clear button. 
20.	Let's search for an existing Position Number by Job Code . Click in the Job Code field. Job Code: <input type="text" value="begins with"/> <input type="text" value=""/> 
21.	Enter the desired information into the Job Code field. Enter " 0164 ". Job Code: <input type="text" value="begins with"/> <input type="text" value=""/> 
22.	Click the Search button. 
23.	Click the scrollbar.
24.	The Search Results lists the positions numbers associated with the Job Code of '0164'.

Step	Action
25.	Click the Clear button. Clear
26.	Click in the Reports To Position Number field. Reports To Position Number: <input type="text" value="begins with"/> <input type="text"/>
27.	Enter the desired information into the Reports To Position Number field. Enter " 00005755 ". Reports To Position Number: <input type="text" value="begins with"/> <input type="text" value="00005755"/>
28.	Click the Search button. Search
29.	Since there is only one record matching the Search Criteria, it opened up the Description page for the Position.
30.	Click the scrollbar.
31.	The position reports to 00005755 as entered on the Search page.
32.	Congratulations! You have completed this lesson. End of Procedure.

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 employee's pay. Information such as Reports To, Department and Location do not impact an employee's pay. 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 employee's pay. Information such as job code and compensation may impact an employee's pay. These changes require the teamwork of both the POS User and HR User to ensure the records stay in sync. Pay impacting updates require specific security roles to make these changes.


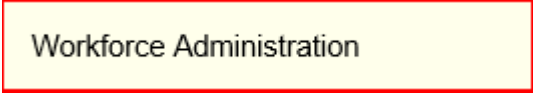
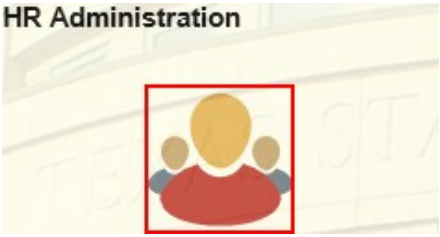

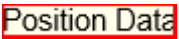



Effective dating is a key consideration when updating position information. Position information is updated in Human Resources by adding effective-dated data rows to the













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

In this lesson, you will learn how to update the department for an existing position.

Step	Action
1.	Click the Employee Self Service button. 
2.	Click the Workforce Administration menu. 
3.	Click the HR Administration button. 
4.	Click the Position Management link. 
5.	Click the Position Data link. 
6.	Enter the desired information into the Position Number field. Enter " 00006291 ". 
7.	Click the Search button. 
8.	Click the Activity Guide Navigation Area button. 
9.	The Position Management - Description page appears displaying the selected Position Number for update.

Step	Action
10.	Click the scrollbar. 
11.	Click the Add a new row at row 1 (Alt+7) button. 
12.	Click the scrollbar. 
13.	In this example, we will use the defaulted date.
14.	Enter the reason for the new row. Click the Look up Reason (Alt+5) button. 
15.	Click the UPD link. 
16.	Click the scrollbar.
17.	Click the Look up Department (Alt+5) button. 
18.	Click the 3000 link. 
19.	Click the scrollbar.
20.	Click the Save button. 
21.	Oops! The Location code has to be entered for the updated Department. Click the OK button. 
22.	Click the Look up Location (Alt+5) button. 
23.	Click the 111 CAPPS Way link. 
24.	Click the Save button. 

Step	Action
25.	After a ' non-pay impacting ' 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 the Budget and Incumbents tab. 
27.	Click the scrollbar.
28.	Click the Job Data link. 
29.	Several indicators on the incumbents Job Data identify that position data has been updated. The Effective Date, Action, and Reason Code
30.	Click the Close button. 
31.	Congratulations! You have completed this lesson. End of Procedure.

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:




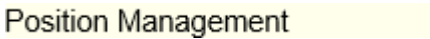

- **Non-pay impacting** - Position-related information that does not impact an employee's pay. Information such as Reports To, Department and Location do not impact an employee's pay. After these data changes are updated, a new effective dated row will automatically appear on the incumbent Job Data. The effective dates on both the Position Data and Job Data records must match.
- **Pay impacting** - Position-related information that does impact an employee's pay. Information such as job code and compensation may impact an employee's 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.



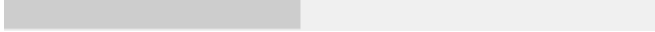



CAPPS Position Management has business processes to assist in tracking discrepancies between Position and Job Data:




- **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

In this lesson, you will learn the steps to maintain the information between the Position and Job Data pages.

Step	Action
1.	Click the Employee Self Service button. 
2.	Click the Workforce Administration menu. 
3.	Click the HR Administration button. 
4.	<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 sync 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 a frequent basis.</p> <p>Let's walk through this maintenance process.</p>
5.	Click the Position Management link. 
6.	Click the Position Data link. 

Step	Action
7.	Click the Activity Guide Navigation Area button. 
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: Position Number: 00006292 Effective Date: 08/11/2020 Job Code: 1016 - Accountant III Salary Plan and Grade: B 17
9.	Enter the desired information into the Position Number field. Enter " 00006292 ". Position Number: <input type="text" value="begins with"/> <input style="border: 2px solid red;" type="text"/>
10.	Click the Search button. 
11.	These are the activities that must be taken when HR initiates a position-related data change that is 'Pay Impacting'. Let's walk through the steps after receiving notification of the position-related data change.
12.	The following fields must be updated to match the Job Data record for the incumbent: Effective Date, Job Code, and Salary Plan and Grade.
13.	Click the scrollbar. 
14.	Click the Add a new row at row 1 (Alt+7) button. 
15.	Click the scrollbar.
16.	The HR Job Data record was updated with an effective date of 8/11/2020. This must also be the effective date for the new row in Position Data.
17.	Click the Look up Reason (Alt+5) button. 
18.	Click the UPD link. 

Step	Action
19.	Click in the Job Code field. 
20.	Press [Backspace] .
21.	Enter the desired information into the Job Code field. Enter " 1016 ". 
22.	Press [Tab] .
23.	Click the scrollbar.
24.	Notice the Job Code , Salary Admin Plan and Grade now reflect the updated information. Click the Save button. 
25.	After the position information has been updated, the POS User must contact the HR User to re-sync Job and Position Data records for the incumbents. The next step is to run the Audit - Position Exceptions Report.
26.	Congratulations! You have completed this lesson. End of Procedure.


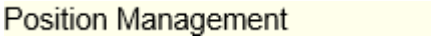








Clone a Position



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

Procedure

In this lesson, you will learn how to create a new position that has the exact characteristics as an existing position.

Step	Action
1.	Click the Employee Self Service button. 
2.	Click the Workforce Administration menu. 

Step	Action
3.	Click the HR Administration button. 
4.	Click the Position Management link. 
5.	Click the Position Data link. 
6.	Click the Add a New Value tab. 
7.	Click the Add button. 
8.	Click the Activity Guide Navigation Area button. 
9.	At this point, you would have identified an existing position that has the appropriate characteristics to clone.
10.	Click the scrollbar.
11.	This button only appears when a new position is being added. Click the Initialize button. 
12.	Click in the Position Number field. 
13.	Enter the desired information into the Position Number field. Enter " 00006292 ". 
14.	Click the OK button. 
15.	Click the scrollbar.

Step	Action
16.	Click the scrollbar. 
17.	Click the Save button. 
18.	Click the scrollbar.
19.	Position Management has created a new Position Number with the exact characteristics as an existing position.
20.	Congratulations! You have completed this lesson. End of Procedure.

Section 2 - Process a Position Change Request

Updating and Correcting Position Data



Section 2, Lesson 2 Exercise - Scenario: Updating and Correcting Position Data

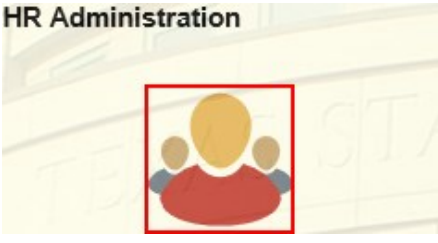
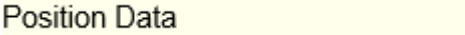


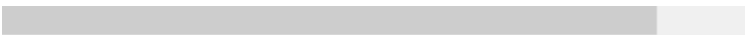

What if you've just saved a new data row and discover that you entered the wrong information in one of the fields that you changed? You don't want to insert a new row to correct the mistake nor do you want to delete the row because, it's essentially correct. To solve this problem, use the **Correction** action to fix the data, but keep the row intact.

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




Procedure

In this lesson, you will learn how to correct an error on an update made to a position.

Step	Action
1.	Click the Employee Self Service button. 
2.	Click the scrollbar. 

Step	Action
3.	Click the Workforce Administration menu. 
4.	Click the HR Administration button. 
5.	Click the Position Management link. 
6.	Click the Position Data link. 
7.	Click the Activity Guide Navigation Area button. 
8.	Enter the desired information into the Position Number field. Enter " 00005208 ". 
9.	Click the Search button. 
10.	You are going to update the location for this position.
11.	Click the scrollbar. 
12.	Click the Add a new row at row 1 (Alt+7) button. 
13.	Click the scrollbar.
14.	Click in the Effective Date field. 
15.	Click the Calendar Effective Date (Alt+5) button. 

Step	Action
16.	Click the 17 button. 
17.	Click the Look up Reason (Alt+5) button. 
18.	Click the UPD link. 
19.	Click the scrollbar.
20.	Click the Look up Location (Alt+5) button. 
21.	Click the 6003 link. 
22.	Click the scrollbar.
23.	Click the Save button. 
24.	You have successfully inserted a new effective dated row with the new location information.
25.	Click the scrollbar.
26.	Click the Return to Search button. 
27.	<p>The position record has been updated, however, you realize the location number should have been entered as 6004 (128 Gettysburg Dr.) instead of 6003 (789 Turtle Blvd.)</p> <p>Let's retrieve that position number (00005208) to make the correction.</p>
28.	<p>Enter the desired information into the Position Number field. Enter "00005208".</p> <p> Position Number: <input type="text" value="begins with"/> <input type="text" value=""/> </p>
29.	Click the Search button. 
30.	Click the scrollbar.
31.	Click the scrollbar.




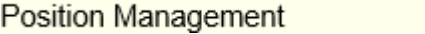
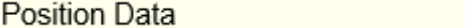


Step	Action
32.	<p>A mistake has been made but it is not necessary to insert a new row to correct the mistake, nor is it necessary to delete the row because it's essentially correct.</p> <p>Let's enable the 'Correct History' button.</p> <p>Click the Correct History button.</p> <p>Correct History</p>
33.	<p>The Correct History button is active when it is grayed out.</p>
34.	<p>Ensure you have accessed the correct effective dated row before proceeding to make the changes.</p> <p>In this example, this is the correct effective-dated row.</p>
35.	<p>Click the scrollbar.</p>
36.	<p>You will correct the Work Location.</p> <p>Warning: Correcting position data overwrites any previous information for that effective dated row.</p> <p>Click the Look up Location (Alt+5) button.</p> <p></p>
37.	<p>Click the 6004 link.</p> <p></p>
38.	<p>Click the scrollbar.</p>
39.	<p>Click the Save button.</p> <p></p>
40.	<p>Congratulations! You have completed this lesson.</p> <p>End of Procedure.</p>








Process a Reclassification

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

Procedure

In this lesson, you will learn how to update a position for a reclassification.

Step	Action
1.	Click the Employee Self Service button. 
2.	Click the Workforce Administration menu. 
3.	Click the HR Administration button. 
4.	Click the Position Management link. 
5.	Click the Position Data link. 
6.	Click the Activity Guide Navigation Area button. 
7.	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.
8.	Enter the desired information into the Position Number field. Enter "00005754". 

Step	Action
9.	Click the Search button. 
10.	Note the current Job Code, Salary Plan and Grade information for this position. This will be the primary information updated for this reclassification.
11.	Click the scrollbar.
12.	Salary Admin Plan information will be updated as well.
13.	Click the scrollbar.
14.	Click the scrollbar.
15.	Click the Add a new row at row 1 (Alt+7) button. 
16.	Click the scrollbar.
17.	The Effective Date will be needed by the HR User when updating the incumbent Job Data.
18.	Click the Look up Reason (Alt+5) button. 
19.	Click the UPD link. 
20.	Click the Look up Job Code (Alt+5) button. 
21.	Click the 0154 link. 
22.	The position job code has been changed from a Admin Asst II (0152) to an Admin Asst III (0154). Note: This type of change impacts the Salary and Grade of the position qualifying it as a 'pay impacting' change.
23.	Click the scrollbar.
24.	Click the Save button. 

Step	Action
25.	<p>Clicking the Save 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 warning or an error message.</p> <ul style="list-style-type: none"> • A warning message alerts of a potential data entry error or change. However, it allows the updates to be saved. • An error message stops the process due to data entry or process error. It requires the user to correct the problem before continuing. <p>Click the OK button.</p> <div data-bbox="440 680 602 747" style="border: 1px solid red; padding: 2px; display: inline-block;">OK</div>
26.	<p>Click the Budget and Incumbents tab.</p> <div data-bbox="440 810 821 884" style="border: 1px solid red; padding: 2px; display: inline-block;">Budget and Incumbents</div>
27.	Click the scrollbar.
28.	<p>Next, <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>
29.	<p>HR must update the following fields on the Job Data page for the position incumbent:</p> <p>Effective Date Action / Reason Job Code Compensation Rate</p>
30.	The Effective Date must match the Effective Dated row on the Position Data page.
31.	Override Position Data enables the HR User to update position-related data
32.	The Action and Reason Code must be updated with the appropriate values for the reclassification.
33.	The Job Code will be updated to match the update made in the Position Data.
34.	The Compensation Rate will also be updated.
35.	<p>After the notification has gone to the HR User, the POS User may run the Audit-Position Exceptions Report to ensure the update has been completed.</p> <p>The report is also used to identify any other position-related discrepancies between Position Data and Job Data.</p>

Step	Action
36.	Congratulations! You have completed this lesson. End of Procedure.

Section 3 - Position Workflow

Maintain Reports To Relationship


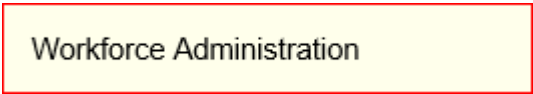

Section 3, Lesson 1 Exercise - Scenario: Update the 'Reports To' position on an existing position










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.
- 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

In this lesson, you will learn how to maintain the reporting structure among positions.

Step	Action
1.	Click the Employee Self Service button. 
2.	Click the Workforce Administration menu. 
3.	Click the HR Administration button. 

Step	Action
4.	Click the Position Management link. 
5.	Click the Position Data link. 
6.	Click the Activity Guide Navigation Area button. 
7.	Enter the desired information into the Position Number field. Enter " 00005751 ". Position Number: <input type="text" value="begins with"/> <input type="text" value="00005751"/>
8.	Click the Search button. 
9.	Use this Description page to change the Reports To field. To do this, first insert a new row.
10.	Click the Add a new row at row 1 (Alt+7) button. 
11.	Click the scrollbar.
12.	In this example, use the default date.
13.	Click the Look up Reason (Alt+5) button. 
14.	Click the UPD link. 
15.	Click the scrollbar.
16.	Next, update the Reports To field to reflect the position reporting relationship change. Click the Look up Reports To (Alt+5) button. 
17.	Click the scrollbar.
18.	Click the 00006220 link. 
19.	Notice the Reports To position description has been updated to a Director IV.

Step	Action
20.	Click the scrollbar.
21.	Click the Save button. 
22.	Let's take a look at how this update has impacted the incumbents Job Data.
23.	Click the scrollbar.
24.	Click the Budget and Incumbents tab. 
25.	Notice the Position Data - Budget and Incumbents 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.
26.	Click the scrollbar.
27.	Click the Job Data link. 
28.	This is an example of a job record that has been impacted by a vacated manager position. Automated 'Reports To' Change: When a management position becomes vacant, incumbents (excluding Contingent workers) that Report To 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 Action/Reason Code . Note: This automated process does not apply to non-employees (Contingent workers). Their job records may be updated by a Core user, as needed.
29.	Click the Close button. 
30.	Congratulations! You have completed this lesson. End of Procedure.







Section 4 - Reports & Queries











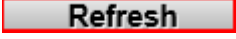

Audit Exception Positions Report

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

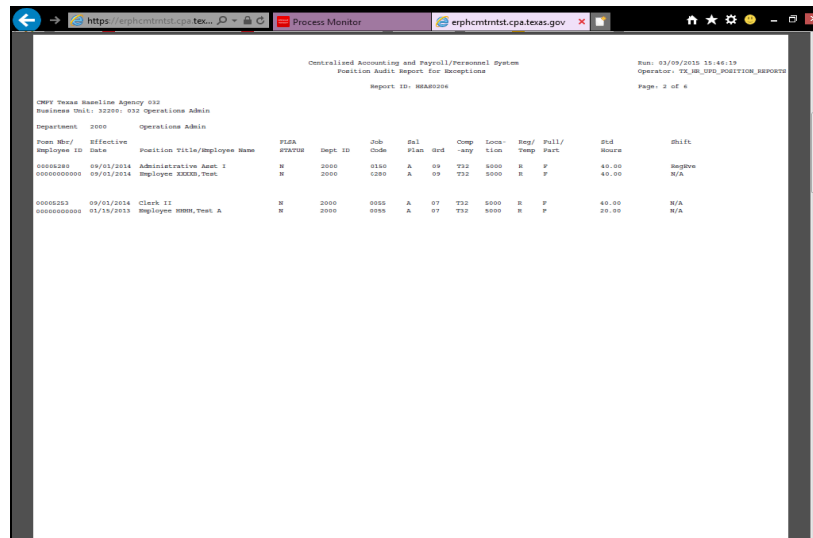
Procedure


In this lesson, you will learn how to run the CAPPS Position Management **Audit Exception Position** report.

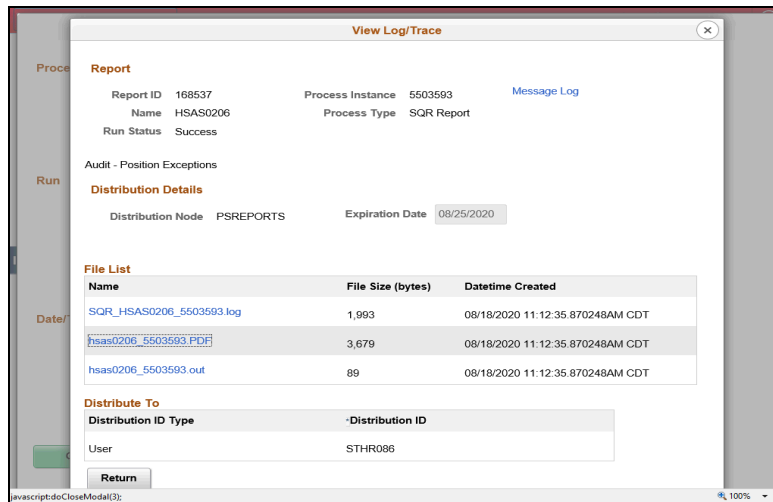
Step	Action
1.	Click the Employee Self Service button. 
2.	Click the Workforce Administration menu. 
3.	Click the Reports button. 
4.	Click the Position Reports link. 
5.	Click the Audit - Position Exceptions link. 
6.	Click the Activity Guide Navigation Area button. 
7.	The Audit - Position Exceptions report displays discrepancies between position-related data and incumbent job data. This exercise will walk through the steps to run this report.



Step	Action
8.	<p>If you have set up a Run Control ID, you can search for it using Find an Existing Value. If this is the first time to run this particular process, you can Add a New Value.</p> <p>Click the Add a New Value tab.</p> 
9.	<p>Enter the desired information into the Run Control ID field. Enter "excep".</p> <p>Run Control ID: </p>
10.	<p>Click the Add button.</p> 
11.	<p>Your Set ID should default.</p> <p>Click the Look up *Set ID (Alt+5) button.</p> 
12.	<p>Click the 086TX link.</p> 
13.	<p>Click the Calendar As Of Date (Alt+5) button.</p> 
14.	<p>Click the 18 button.</p> 
15.	<p>Click the Run button.</p> 
16.	<p>Click the + button before the OK tree item.</p> 
17.	<p>Click the Process Monitor link.</p> 
18.	<p>Click the scrollbar.</p>
19.	<p>Click the Refresh button.</p> 
20.	<p>Click the Details link.</p> 

Step	Action
21.	Click the View Log/Trace link. View Log/Trace
22.	The output format for this report is a .PDF file. Click the hsas0206_5503593.PDF link. hsas0206_5503593.PDF
23.	The report is sorted by Agency, Business Unit and Department ID .
24.	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.
25.	The position-related information displayed on the two rows should match exactly, including the Effective Date .
26.	Notice in this example, the Job Code and the Shift information is 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
27.	Click the Close Tab (Ctrl+W) button. 

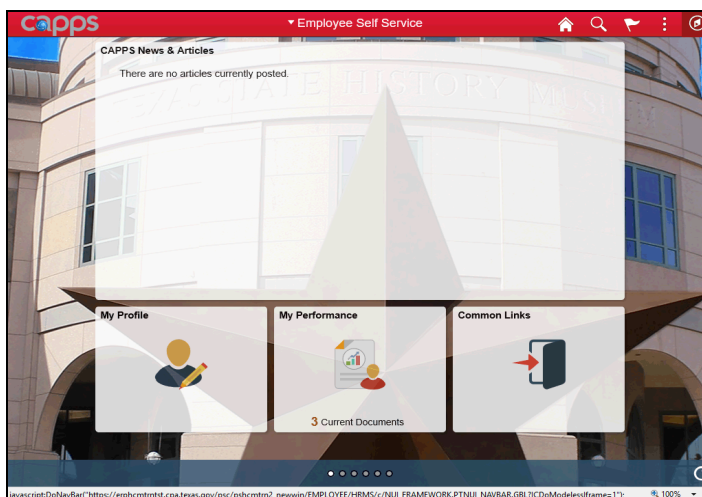






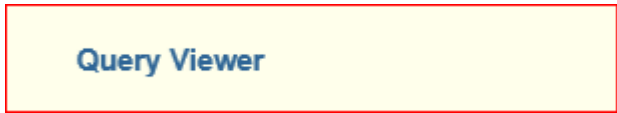

Step	Action
28.	Click the Close button. 
29.	Click the Close button. 
30.	Congratulations! You have completed this report. End of Procedure.



All Agency Position

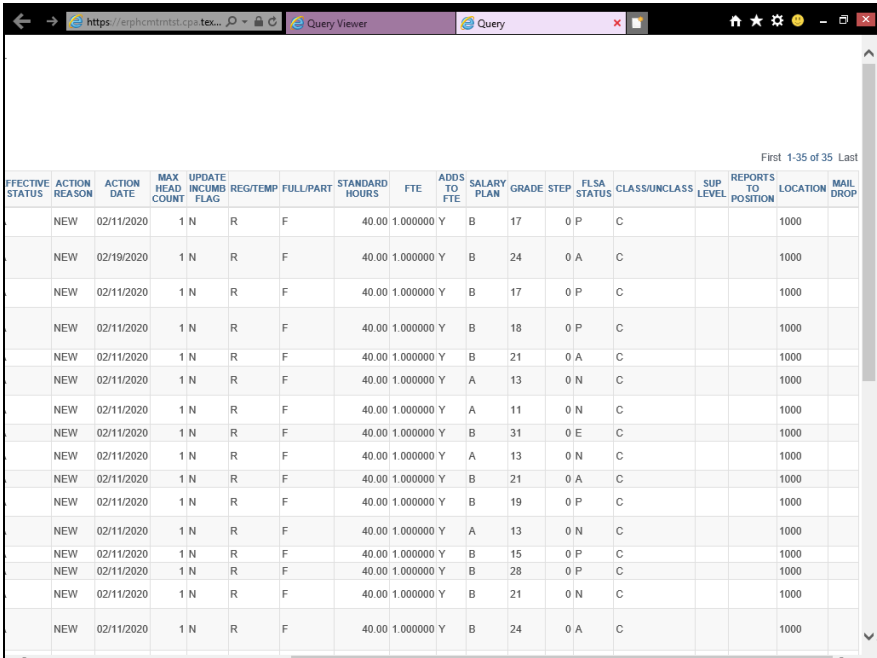
Section 4, Lesson 2 Exercise - Scenario: Run the All Agency Positions query Procedure

In this lesson, you will learn how to run the **All Agency Position** query using Query Viewer.




Step	Action
1.	Click the NavBar button. 
2.	Click the Navigator button. 
3.	Click the scrollbar.
4.	Click the Reporting Tools menu. 
5.	Click the Query menu. 
6.	Click the Query Viewer menu. 
7.	Use the Query Viewer page to run the All Agency Positions query in order to view a list of current Agency positions.
8.	Enter the desired information into the *Search By - begins with field. Enter the desired information into the begins with field. Enter "tx_hr". begins with <input data-bbox="680 1430 1292 1493" type="text"/>
9.	Click the Search button. 
10.	Queries meeting the entered criteria are displayed under Search Results .
11.	Click the scrollbar.
12.	Notice that the query name TX_HR_AGY_POSITION_ALL appears in the list.
13.	Use the Run to HTML link to open a query within your browser window.
14.	Use the Run to Excel link to download a query to an Excel spreadsheet.
15.	(Do not use.) The Run to XML link is to download query in XMLP format.

Step	Action
16.	Click the HTML link. 
17.	Enter the desired information into the Enter Agency Number field. Enter " 086 ". Enter Agency Number: <input type="text"/>
18.	You can leave Business Unit blank or you can select a specific department.
19.	Click the View Results button. 
20.	This output may be downloaded as an Excel Spreadsheet or CSV Text File for future reference.



EFFECTIVE STATUS	ACTION REASON	ACTION DATE	MAX HEAD COUNT	UPDATE INCUMB FLAG	REG/TEMP	FULL/PART	STANDARD HOURS	FTE	ADDS TO FTE	SALARY PLAN	GRADE	STEP	FLSA STATUS	CLASS/UNCLASS	SUP LEVEL	REPORTS TO POSITION	LOCATION	MAIL DROP
NEW		02/11/2020	1	N	R	F	40.00	1.000000	Y	B	17	0	P	C			1000	
NEW		02/19/2020	1	N	R	F	40.00	1.000000	Y	B	24	0	A	C			1000	
NEW		02/11/2020	1	N	R	F	40.00	1.000000	Y	B	17	0	P	C			1000	
NEW		02/11/2020	1	N	R	F	40.00	1.000000	Y	B	18	0	P	C			1000	
NEW		02/11/2020	1	N	R	F	40.00	1.000000	Y	B	21	0	A	C			1000	
NEW		02/11/2020	1	N	R	F	40.00	1.000000	Y	A	13	0	N	C			1000	
NEW		02/11/2020	1	N	R	F	40.00	1.000000	Y	A	11	0	N	C			1000	
NEW		02/11/2020	1	N	R	F	40.00	1.000000	Y	B	31	0	E	C			1000	
NEW		02/11/2020	1	N	R	F	40.00	1.000000	Y	A	13	0	N	C			1000	
NEW		02/11/2020	1	N	R	F	40.00	1.000000	Y	B	21	0	A	C			1000	
NEW		02/11/2020	1	N	R	F	40.00	1.000000	Y	B	19	0	P	C			1000	
NEW		02/11/2020	1	N	R	F	40.00	1.000000	Y	A	13	0	N	C			1000	
NEW		02/11/2020	1	N	R	F	40.00	1.000000	Y	B	15	0	P	C			1000	
NEW		02/11/2020	1	N	R	F	40.00	1.000000	Y	B	28	0	P	C			1000	
NEW		02/11/2020	1	N	R	F	40.00	1.000000	Y	B	21	0	N	C			1000	
NEW		02/11/2020	1	N	R	F	40.00	1.000000	Y	B	24	0	A	C			1000	






Step	Action
21.	Click the Close Tab (Ctrl+W) button. 
22.	Congratulations! You have completed this lesson. End of Procedure.




All Agency Vacant Position

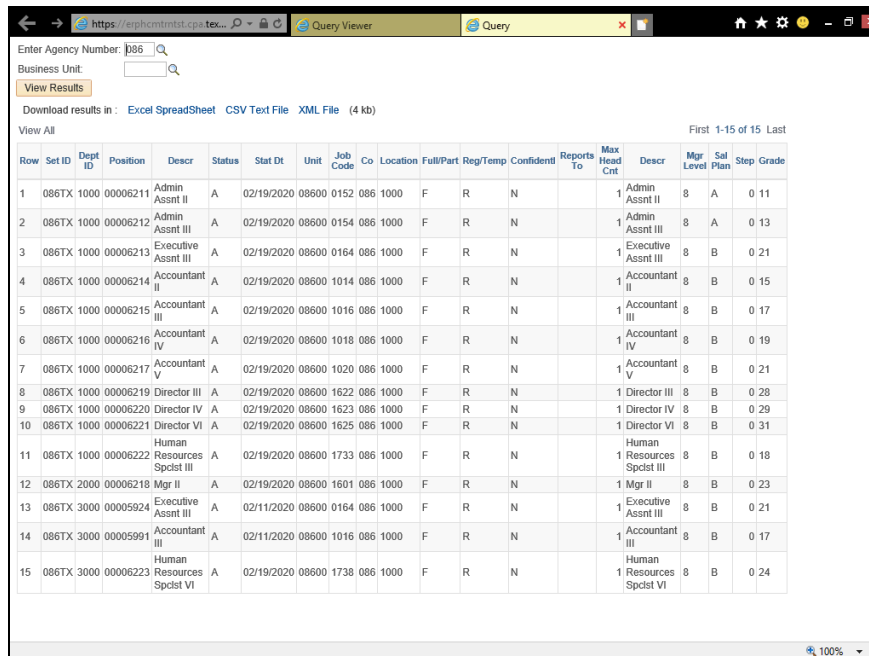
Section 4, Lesson 3 Exercise - Scenario: Run the All Agency Vacant Positions query


Procedure

In this lesson, you will learn how to run the All Agency Vacant Positions query using Query Viewer.

Step	Action
1.	Click the NavBar button. 
2.	Click the Navigator button. 
3.	Click the scrollbar.
4.	Click the Reporting Tools menu. 
5.	Click the Query menu. 
6.	Click the Query Viewer menu. 
7.	Use the Query Viewer page the run the All Agency Vacant Position query to view a list of current Agency positions.
8.	Enter the desired information into the *Search By - begins with field. Enter the desired information into the begins with field. Enter " tx_hr_agy_ ". begins with <input data-bbox="680 1745 1292 1808" type="text"/>

Step	Action
9.	Click the Search button. 
10.	Click the scrollbar.
11.	Click the HTML link. 
12.	Enter the desired information into the Enter Agency Number field. Enter " 086 ". Enter Agency Number: <input data-bbox="592 594 665 632" type="text"/>
13.	Click the View Results button. 



Step	Action
14.	Click the Close Tab (Ctrl+W) button. 
15.	Congratulations! You have completed this lesson. End of Procedure.