CAPPS HR/PAYROLL

End-User Training (EUT)

EUT Course - 120

Position Management

PeopleSoft 9.2

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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 1. Click the **Employee Self Service** button.

Step 2. Click the **Workforce Administration** menu.

Step 3. Click the **HR Administration** button.

Step 4. Click the **Position Management** link.

Step 5. Click the **Position Data** link.

Step 6. Click the **Activity Guide Navigation Area** button.

Step 7. CAPPS Position Management displays the **Add/Update Position Info** page.

Step 8. This page is used to add new positions as well as search for existing position information.

Step 9. Click the **Add a New Value** tab.

Step 10. The system auto-generates position numbers upon saving the record.

Step 11. Click the **Add** button.

Step 12. The **Description** page is used to enter Position, Job, Work Location and Salary Plan information of a position.

Step 13. A key field to understand when adding position information is the **Effective Date**.

Step 14. **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.

Step 15. The **Effective Date** defaults to the system date which is the current date.

Step 16. The Reason code **'New'** will default because you selected that you were adding a New Value.

Step 17. Otherwise, you would select **'Update'** as the Reason.

Step 18. 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.

Step 19. Let's continue by selecting a **Job Code**.

Step 20. Click the **Lookup Job Code (Alt+5)** button.

Step 21. Click the **0164 - Executive Assnt III** link.

Step 22. Notice the default Job information that appears as it relates to the selected job code.

Step 23. The next step in creating a new position is to indicate the **Work Location** information.

Step 24. Click the scrollbar.

Step 25. Click the **Look up Department (Alt+5)** button.

Step 26. Click the **1000** link.

Step 27. To see the description of the **Department** value entered.

Step 28. The **Location** may or may not populate based on the Department entered.

Step 29. **Note**: These fields may or may not populate based on information placed on the Location Table.

Step 30. Click the **Look up Location (Alt+5)** button.

Step 31. Click the **111 CAPPS Way** link.

Step 32. The **Reports To** field is used to build reporting relationships between positions.

Step 33. It can also be used to generate organizational reports in Position Management, such as the HR Management to Staff Ratio Report.

Step 34. Click the **Look up Reports To (Alt+5)** button.

Step 35. Click the scrollbar.

Step 36. Click the **00005755** link.

Step 37. Notice the **Reports To** field displays the new reports to position.

Step 38. To meet the State Auditor's Office reporting requirements, the **Supervisor Level** field is also used to track reporting relationships among positions.

Step 39. Click the **Look up Supervisor Lvl (Alt+5)** button.

Step 40. Click the **NON-MGR** link.

Step 41. The Salary Plan information also populates from the Job Code that was entered.

Step 42. Click the scrollbar.

Step 43. Click the **Specific Information** tab.

Step 44. Use the **Specific Information** page to enter information that is specific to the position.

Step 45. This page is also used to trigger incumbent's position-related data changes.

Step 46. FTE tracking is located in the **Education and Government** section.

Step 47. Click the **Expand section Education and Government** button.

Step 48. Click the scrollbar.

Step 49. 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).

Step 50. Double-click in the **FTE** field.

Step 51. Enter the desired information into the **FTE** field. Enter "**1**".

Step 52. Click the **Adds to FTE Actual Count** option.

Step 53. Click the scrollbar.

Step 54. 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.

Step 55. Click the **Budget and Incumbents** tab.

Step 56. After an employee has been assigned to this position, the **Budget and Incumbents** page can be used to view the incumbents Information.

Step 57. CAPPS Position Management will display the **Current Incumbents** information only.

Step 58. **Note:** An employee has not been assigned to the position so this information is currently blank.

Step 59. Click the **Save** button.

Step 60. A new position has been created with the **Position Number** of 00006291.

Step 61. This position is now available for HR to assign to an employee.

Step 62. 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.

Step 63. Let's walk through that update process.

Click the **Activity Navigator** button.

Step 64. Enter the desired information into the **Position Number** field. Enter **"00006291"**.

Step 65. Click the **Search** button.

Step 66. Click the scrollbar.

Step 67. Click the **Add a new row at row 1 (Alt+7)** button.

Step 68. Click the scrollbar.

Step 69. The current date defaults but if it isn't the same date on the HR record, then you will change it.

Step 70. In this example, the HR record was entered on the current date, August 5, 2020.

Step 71. Click the **Look up Reason (Alt+5)** button.

Step 72. You are updating this Position not creating a New Position.

Step 73. Click the **UPD** link.

Step 74. Click the **Specific Information** tab.

Step 75. Click the scrollbar.

Step 76. 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.

Step 77. You can view the employee information for the Incumbent assigned to this position.

Step 78. Click the **Budget and Incumbents** tab.

Step 79. Click the scrollbar.

Step 80. You can also view the Job Data pages.

Step 81. Click the **Job Data** link.

Step 82. Click the **Close** button.

Step 83. Click the scrollbar.

Step 84. Don't forget to Save the update.

Click the **Save** button.

Step 85. Congratulations! You have completed this lesson.

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 1. Click the **Employee Self Service** button.

Step 2. Click the **Workforce Administration** menu.

Step 3. Click the **HR Administration** button.

Step 4. Click the **Position Management** link.

Step 5. Click the **Position Data** link.

Step 6. The **Add/Update Position Info** page provides several ways to search for an existing Position Number.

Step 7. Let's start with searching for an existing Position Number by **Departmen**t.

Step 8. Click in the **Department** field.

Step 9. Enter the desired information into the **Department** field. Enter "**3000**".

Step 10. Click the **Search** button.

Step 11. Click the **Activity Guide Navigation Area** button.

Step 12. Scroll down the page to see the Search Results.

Step 13. Click the scrollbar.

Step 14. The **Search Results** list the Positions that match the Department search criteria.

Step 15. Click the **00005918** link.

Step 16. CAPPS retrieves the selected position information.

Step 17. You can scroll down the page to see the Department ID in the Work Location section. Note the Department ID matches the search criteria.

Step 18. Click the scrollbar.

Step 19. The **Department ID** field contains 3000 that was in the Search Criteria.

Step 20. Click the scrollbar.

Step 21. Click the **Return to Search** button.

Step 22. To begin a new search,

Step 23. Click the **Clear** button.

Step 24. Let's search for an existing Position Number by **Job Code**.

Step 25. Click in the **Job Code** field.

Step 26. Enter the desired information into the **Job Code** field. Enter "**0164**".

Step 27. Click the **Search** button.

Step 28. Click the scrollbar.

Step 29. The **Search Results** lists the positions numbers associated with the **Job Code** of '0164'.

Step 30. Click the **Clear** button.

Step 31. Click in the **Reports To Position Number** field.

Step 32. Enter the desired information into the **Reports To Position Number** field. Enter "**00005755**".

Step 33. Click the **Search** button.

Step 34. Since there is only one record matching the Search Criteria, it opened up the Description page for the Position.

Step 35. Click the scrollbar.

Step 36. The position reports to 00005755 as entered on the Search page.

Step 37. Congratulations! You have completed this lesson.

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 <u>does not</u> 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 <u>does</u> 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 1. Click the **Employee Self Service** button.

Step 2. Click the **Workforce Administration** menu.

Step 3. Click the **HR Administration** button.

Step 4. Click the **Position Management** link.

Step 5. Click the **Position Data** link.

Step 6. Enter the desired information into the **Position Number** field. Enter **"00006291"**.

Step 7. Click the **Search** button.

Step 8. Click the **Activity Guide Navigation Area** button.

Step 9. The **Position Management - Description** page appears displaying the selected Position Number for update.

Step 10. Click the scrollbar.

Step 11. Click the **Add a new row at row 1 (Alt+7)** button.

Step 12. Click the scrollbar.

Step 13. In this example, we will use the defaulted date.

Step 14. Enter the reason for the new row.

Step 15. Click the **Look up Reason (Alt+5)** button.

Step 16. Click the **UPD** link.

Step 17. Click the scrollbar.

Step 18. Click the **Look up Department (Alt+5)** button.

Step 19. Click the **3000** link.

Step 20. Click the scrollbar.

Step 21. Click the **Save** button.

Step 22. Oops! The Location code has to be entered for the updated Department.

Step 23. Click the **OK** button.

Step 24. Click the **Look up Location (Alt+5)** button.

Step 25. Click the **111 CAPPS Way** link.

Step 26. Click the **Save** button.

Step 27. After a **'non-pay impacting'** update has been made to position data, CAPPS automatically inserts a row on the incumbents Job Data.

Step 28. Let's look at an example of this activity on the incumbents Job Data.

Click the **Budget and Incumbents** tab.

Step 29. Click the scrollbar.

Step 30. Click the **Job Data** link.

Step 31. Several indicators on the incumbents Job Data identify that position data has been updated.

-The **Effective Date**, **Action**, and **Reason Code**

Step 32. Click the **Close** button.

Step 33. Congratulations! You have completed this lesson.

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 sync.
- **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 sync.

Procedure

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

Step 1. Click the **Employee Self Service** button.

Step 2. Click the **Workforce Administration** menu.

Step 3. Click the **HR Administration** button.

Step 4. 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.

Step 5. 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.

Step 6. Let's walk through this maintenance process.

Click the **Position Management** link.

Step 7. Click the **Position Data** link.

Step 8. Click the **Activity Guide Navigation Area** button.

Step 9. 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.

Step 10. 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

Step 11. Enter the desired information into the **Position Number** field. Enter "**00006292**".

Step 12. Click the **Search** button.

Step 13. These are the activities that must be taken when HR initiates a position-related data change that is 'Pay Impacting'.

Step 14. Let's walk through the steps after receiving notification of the position-related data change.

The following fields must be updated to match the Job Data record for the incumbent: **Effective Date, Job Code, and Salary Plan and Grade**.

Step 15. Click the scrollbar.

Step 16. Click the **Add a new row at row 1 (Alt+7)** button.

Step 17. Click the scrollbar.

Step 18. The HR Job Data record was updated with an effective date of 8/11/2020.

Step 19. This must also be the effective date for the new row in Position Data.

Step 20. Click the **Look up Reason (Alt+5)** button.

Step 21. Click the **UPD** link.

Step 22. Click in the **Job Code** field.

Step 23. Press **[Backspace]**.

Step 24. Enter the desired information into the **Job Code** field. Enter "**1016**".

Step 25. Press **[Tab]**.

Step 26. Click the scrollbar.

Step 27. Notice the **Job Code**, **Salary Admin Plan** and **Grade** now reflect the updated information.

Step 28. Click the **Save** button.

Step 29. 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.

Step 30. The next step is to run the Audit - Position Exceptions Report.

Step 31. Congratulations! You have completed this lesson.

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 1. Click the **Employee Self Service** button.

Step 2. Click the **Workforce Administration** menu.

Step 3. Click the **HR Administration** button.

Step 4. Click the **Position Management** link.

Step 5. Click the **Position Data** link.

Step 6. Click the **Add a New Value** tab.

Step 7. Click the **Add** button.

Step 8. Click the **Activity Guide Navigation Area** button.

Step 9. At this point, you would have identified an existing position that has the appropriate characteristics to clone.

Step 10. Click the scrollbar.

Step 11. This button only appears when a new position is being added.

Click the **Initialize** button.

Step 12. Click in the **Position Number** field.

Step 13. Enter the desired information into the **Position Number** field. Enter "**00006292**".

Step 14. Click the **OK** button.

Step 15. Click the scrollbar.

Step 16. Click the **Save** button.

Step 17. Click the scrollbar.

Step 18. Position Management has created a new Position Number with the exact characteristics as an existing position.

Step 19. Congratulations! You have completed this lesson.

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 1. Click the **Employee Self Service** button.

Step 2. Click the scrollbar.

Step 3. Click the **Workforce Administration** menu.

Step 4. Click the **HR Administration** button.

Step 5. Click the **Position Management** link.

Step 6. Click the **Position Data** link.

Step 7. Click the **Activity Guide Navigation Area** button.

Step 8. Enter the desired information into the **Position Number** field. Enter "**00005208**".

Step 9. Click the **Search** button.

Step 10. You are going to update the location for this position.

Click the scrollbar.

Step 11. Click the **Add a new row at row 1 (Alt+7)** button.

Step 12. Click the scrollbar.

Step 13. Click in the **Effective Date** field.

Step 14. Click the **Calendar Effective Date (Alt+5)** button.

Step 15. Click the **17** button.

Step 16. Click the **Look up Reason (Alt+5)** button.

Step 17. Click the **UPD** link.

Step 18. Click the scrollbar.

Step 19. Click the **Look up Location (Alt+5)** button.

Step 20. Click the **6003** link.

Step 21. Click the scrollbar.

Step 22. Click the **Save** button.

Step 23. You have successfully inserted a new effective dated row with the new location information.

Step 24. Click the scrollbar.

Step 25. Click the **Return to Search** button.

Step 26. 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.)

Step 27. Let's retrieve that position number (**00005208**) to make the correction.

Enter the desired information into the **Position Number** field. Enter "**00005208**".

Step 28. Click the **Search** button.

Step 29. Click the scrollbar.

Step 30. 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 **'Correct History'** button.

Step 31. Click the **Correct History** button.

The **Correct History** button is active when it is grayed out.

Step 32. Ensure you have accessed the correct effective dated row before proceeding to make the changes.

Step 33. In this example, this is the correct effective-dated row.

Step 34. Click the scrollbar.

Step 35. You will correct the **Work Location**.

Step 36. **Warning:** Correcting position data overwrites any previous information for that effective dated row.

Step 37. Click the **Look up Location (Alt+5)** button.

Step 38. Click the **6004** link.

Step 39. Click the scrollbar.

Step 40. Click the **Save** button.

Step 41. Congratulations! You have completed this lesson.

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 1. Click the **Employee Self Service** button.

Step 2. Click the **Workforce Administration** menu.

Step 3. Click the **HR Administration** button.

Step 4. Click the **Position Management** link.

Step 5. Click the **Position Data** link.

Step 6. Click the **Activity Guide Navigation Area** button.

Step 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.

Step 8. Enter the desired information into the **Position Number** field. Enter "**00005754**".

Step 9. Click the **Search** button.

Step 10. Note the current **Job Code, Salary Plan** and **Grade** information for this position.

This will be the primary information updated for this reclassification.

Step 11. Click the scrollbar.

Step 12. Salary Admin Plan information will be updated as well.

Step 13. Click the scrollbar.

Step 14. Click the **Add a new row at row 1 (Alt+7)** button.

Step 15. Click the scrollbar.

Step 16. The **Effective Date** will be needed by the HR User when updating the incumbent Job Data.

Step 17. Click the **Look up Reason (Alt+5)** button.

Step 18. Click the **UPD** link.

Step 19. Click the **Look up Job Code (Alt+5)** button.

Step 20. Click the **0154** link.

Step 21. The position job code has been changed from an 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.

Step 22. Click the scrollbar.

Step 23. Click the **Save** button.

Step 24. 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.

- 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.

Step 25. Click the **OK** button.

Step 26. Click the **Budget and Incumbents** tab.

Step 27. Click the scrollbar.

Step 28. Next, <u>The POS User must notify the HR User of the change to Position Data.</u>

The HR User must now update the incumbents Job Data record with this new information.

Step 29. Let's take a look at the fields the HR User must update on the incumbents Job Data.

Step 30. HR must update the following fields on the Job Data page for the position incumbent:

Effective Date

Action / Reason

Job Code

Compensation Rate

Step 31. The **Effective Date** must match the Effective Dated row on the Position Data page.

Step 32. **Override Position Data** enables the HR User to update position-related data

Step 33. The **Action** and **Reason Code** must be updated with the appropriate values for the reclassification.

Step 34. The **Job Code** will be updated to match the update made in the Position Data.

Step 35. The **Compensation Rate** will also be updated.

Step 36. 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.

Step 37. The report is also used to identify any other position-related discrepancies between Position Data and Job Data.

Step 38. Congratulations! You have completed this lesson.

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 1.	Click the **Employee Self Service** button.
Step 2.	Click the **Workforce Administration** menu.
Step 3.	Click the **HR Administration** button.
Step 4.	Click the **Position Management** link.
Step 5.	Click the **Position Data** link.
Step 6.	Click the **Activity Guide Navigation Area** button.
Step 7.	Enter the desired information into the **Position Number** field. Enter "**00005751**".
Step 8.	Click the **Search** button.
Step 9.	Use this **Description** page to change the **Reports To** field. To do this, first insert a new row.
Step 10.	Click the **Add a new row at row 1 (Alt+7)** button.
Step 11.	Click the scrollbar.
Step 12.	In this example, use the default date.
Step 13.	Click the **Look up Reason (Alt+5)** button.
Step 14.	Click the **UPD** link.
Step 15.	Click the scrollbar.
Step 16.	Next, update the **Reports To** field to reflect the position reporting relationship change.
Step 17.	Click the **Look up Reports To (Alt+5)** button.
Step 18.	Click the scrollbar.
Step 19.	Click the **00006220** link.
Step 20.	Notice the **Reports To** position description has been updated to a Director IV.
Step 21.	Click the scrollbar.
Step 22.	Click the **Save** button.

Step 23. Let's take a look at how this update has impacted the incumbents Job Data.

Step 24. Click the scrollbar.

Step 25. Click the **Budget and Incumbents** tab.

Notice the **Position Data - Budget and Incumbents** page displays the update as it appears on the incumbent's current job record.

Step 26. Next, let's take a look at the impact on a Job Data record when a Manager position has become vacant.

Step 27. Click the scrollbar.

Step 28. Click the **Job Data** link.

Step 29. This is an example of a job record that has been impacted by a vacated manager position.

Step 30. **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.

Step 31. Click the **Close** button.

Step 32. Congratulations! You have completed this lesson.

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 1. Click the **Employee Self Service** button.

Step 2. Click the **Workforce Administration** menu.

Step 3. Click the **Reports** button.

Step 4. Click the **Position Reports** link.

Step 5. Click the **Audit - Position Exceptions** link.

Step 6. Click the **Activity Guide Navigation Area** button.

Step 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 8. 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**.

Step 9. Click the **Add a New Value** tab.

Step 10. Enter the desired information into the **Run Control ID** field. Enter "**excep**".

Step 11. Click the **Add** button.

Step 12. Your Set ID should default.

Step 13. Click the **Look up *Set ID (Alt+5)** button.

Step 14. Click the **086TX** link.

Step 15. Click the **Calendar As Of Date (Alt+5)** button.

Step 16. Click the **18** button.

Step 17. Click the **Run** button.

Step 18. Click **OK** button.

Step 19. Click the **Process Monitor** link.

Step 20. Click the scrollbar.

Step 21. Click the **Refresh** button.

Step 22. Click the **Details** link.

Step 23. Click the **View Log/Trace** link.

Step 24. The output format for this report is a .PDF file.

Step 25. Click the **hsas0206_5503593.PDF** link.

Step 26. The report is sorted by **Agency**, **Business Unit** and **Department ID**.

Step 27. 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.

Step 28. The position-related information displayed on the two rows should match exactly, including the **Effective Date.**

Step 29. Notice in this example, the **Job Code** and the **Shift** information is different.

Step 30. 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 31. Click the **Close Tab (Ctrl+W)** button.

Step 32. Click the **Close** button.

Step 33. Click the **Close** button.

Step 34. Congratulations! You have completed this report.

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 1. Click the **NavBar** button.

Step 2. Click the **Navigator** button.

Step 3. Click the scrollbar.

Step 4. Click the **Reporting Tools** menu.

Step 5. Click the **Query** menu.

Step 6. Click the **Query Viewer** menu.

Step 7. Use the **Query Viewer** page to run the **All Agency Positions** query in order to view a list of current Agency positions.

Step 8. Enter the desired information into the ***Search By - begins with** field.

Step 9. Enter the desired information into the **begins with** field. Enter "**tx_hr**".

Step 10. Click the **Search** button.

Step 11. Queries meeting the entered criteria are displayed under **Search Results**.

Step 12. Click the scrollbar.

Step 13. Notice that the query name **TX_HR_AGY_POSITION_ALL** appears in the list.

Step 14. Use the Run to HTML link to open a query within your browser window.

Step 15. Use the Run to Excel link to download a query to an Excel spreadsheet.

Step 16. (Do not use.) The Run to XML link is to download query in XMLP format.

Step 17. Click the **HTML** link.

Step 18. Enter the desired information into the **Enter Agency Number** field. Enter "**086**".

Step 19. You can leave Business Unit blank or you can select a specific department.

Step 20. Click the **View Results** button.

Step 21. This output may be downloaded as an **Excel Spreadsheet or CSV Text File** for future reference.

Step 22. Click the **Close Tab (Ctrl+W)** button.

Step 23. Congratulations! You have completed this lesson.

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 1. Click the **NavBar** button.

Step 2. Click the **Navigator** button.

Step 3. Click the scrollbar.

Step 4. Click the **Reporting Tools** menu.

Step 5. Click the **Query** menu.

Step 6. Click the **Query Viewer** menu.

Step 7. Use the **Query Viewer** page the run the **All Agency Vacant Position** query to view a list of current Agency positions.

Step 8. Enter the desired information into the ***Search By - begins with** field.

Step 9. Enter the desired information into the **begins with** field. Enter "**tx_hr_agy_**".

Step 10. Click the **Search** button.

Step 11. Click the scrollbar.

Step 12. Click the **HTML** link.

Step 13. Enter the desired information into the **Enter Agency Number** field. Enter "**086**".

Step 14. Click the **View Results** button.

Step 15. Click the **Close Tab (Ctrl+W)** button.

Step 16. Congratulations! You have completed this lesson.