Position Creation and Maintenance

Human Resources Front End

How-To Guide

HR Front End Training Team

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN · CHICAGO · SPRINGFIELD

Position Creation and Maintenance

HR Front End

How-To Guide

Revision Information

Guide ID:	Position Creation and Maintenance
Revision Date:	April 28, 2009
Version:	1.1

HR Front End Position Creation and Maintenance Quick View

1	• Select Position Creation and Maintenance transaction.
2	• Complete the Position Selection screen.
3	• View the Incumbent History for an existing position.(if necessary).
4	• Complete the Position Data screen.
5	• Transaction Routed and Applied to Banner.

TABLE OF CONTENTS

Introduction

This guide will help you understand and process Position Creation and Maintenance transactions in the HR Front End. If includes an explanation of Position Creation and Maintenance and gives general guidelines about when it is appropriate to use this transaction type. It also provides instructions on how to complete a Position Creation and Maintenance transaction.

Assumptions

This guide assumes that you have completed the *HR Front End Overview and Navigation* online course. This prerequisite helps acquaint you with the general functionality of and navigation in the HR Front End. Material presented in the *HR Front End Overview and Navigation* course is not repeated in this guide.

Before processing a Position Creation and Maintenance transaction, ensure that prior approvals have been obtained where applicable.

What is Position Creation and Maintenance?

A Position Creation and Maintenance transaction in the HR Front End gives you the ability to create a new position or maintain an existing position. When you search for an existing position, you also have the opportunity to view the Incumbent History for the position.

- **Create a New Position**: When you select this option, the Position Creation and Maintenance Wizard leads you through a series of screens to create a new position.

  For example, an employee accepts a new job with your unit. No one has held this particular type of job in the unit before, so there is no existing position number to use. A Position Creation and Maintenance transaction must be completed to create a new position before the employee can be appointed to the new job. Whether the unit or a Central HR Office creates the position depends on your campus business procedure (see Position Creation and Maintenance Responsibilities).

- **Update an Existing Position and View Incumbent History**: You can access an existing position by either typing in the position number or by searching for the position. Searching for an existing position allows you to view the Incumbent History as part of the position maintenance process. The Incumbent History is a list of people who hold or have held the position.

  Use the Position Creation and Maintenance Wizard only for maintenance of pooled or vacant single positions. If you select a filled single position for maintenance, you will be prompted to go to the incumbent's Employee Record View. From there you would complete the transaction as an Employee Job Record Change.

  For example, when the position class and title are changed for a group of grads, the pooled position used for these grads needs to be updated. Use a Position Creation and Maintenance transaction to change the position class and title.

Budget Organization Transfers

In the HR Front End, budget organization transfers are processed as either Position Creation and Maintenance or Employee Job Record Change transactions, depending on the position. The guidelines are the same as those used for updating a position, since a budget organization transfer is a specific type of position maintenance. For pooled and vacant single positions, use Position Creation and Maintenance. For filled single positions use Employee Job Record Change.

Re-Using Positions vs. Creating New Positions

Before creating a new position, determine if there is an existing vacant position that can be re-used. Whether or not a vacant position can be re-used requires comparing the vacant position to the job that will be tied to that position. To help prevent the creation of unnecessary positions, you should re-use an existing vacant position when either of the following applies:

- The vacant position and the job have the same P-class, Title, Position Descriptors, etc.

- The vacant position and the job belong to the same employee group, even if the P-class, Title, Positions Descriptors, etc. do not match exactly.   You have the option in the wizard to edit the P-class, Title, Position Descriptors, etc., of the position to match the job.

    For example, a unit might have a vacant position from a job that no one will hold in the foreseeable future. This position could be modified and used for a new employee performing a different job within the same employee group.

If neither of the above conditions applies, then the Unit or Central HR Office can create a new position, as appropriate.

Position Creation and Maintenance Responsibilities

Whether the Unit or a Central HR Office is responsible for position creation and maintenance depends on the employee group and campus policy. The table below summarizes who is responsible for position creation and maintenance. Your campus HR offices also can help you determine who is responsible for creating and maintaining positions.

Employee Group	Unit			Central HR Offices		
Permanent/Status Civil Service				UIUC	UIC	UIS
Extra Help, Clerical				UIUC	UIC	UIS
Extra Help, Non-Clerical	UIUC				UIC	UIS
Student (SA)				UIUC	UIC	UIS
Faculty and Other Academic	UIUC	UIC	UIS			
Academic Professional	UIUC	UIC				UIS
Unpaid	UIUC	UIC	UIS			
Graduate Assistant	UIUC	UIC				UIS
Hourly (Acad. or Grad.)	UIUC	UIC				UIS

Table 1: Position Creation and Maintenance Responsibilities

Conventions Used in this Guide

Indicates a **Note** or additional information that might be helpful to you.

Indicates a **Hint** such as a tip, shortcut, or additional way to do something.

Indicates a **Warning** of an action that you should not perform or that might cause problems in the application.

Performing Position Creation and Maintenance

You can use the Position Creation and Maintenance transaction to create a new position or maintain an existing position. Follow these steps to complete a Position Creation and Maintenance transaction:

Initiating Position Creation and Maintenance

You can initiate a Position Creation and Maintenance transaction from the Home Page or Employee Record View of the HR Front End.
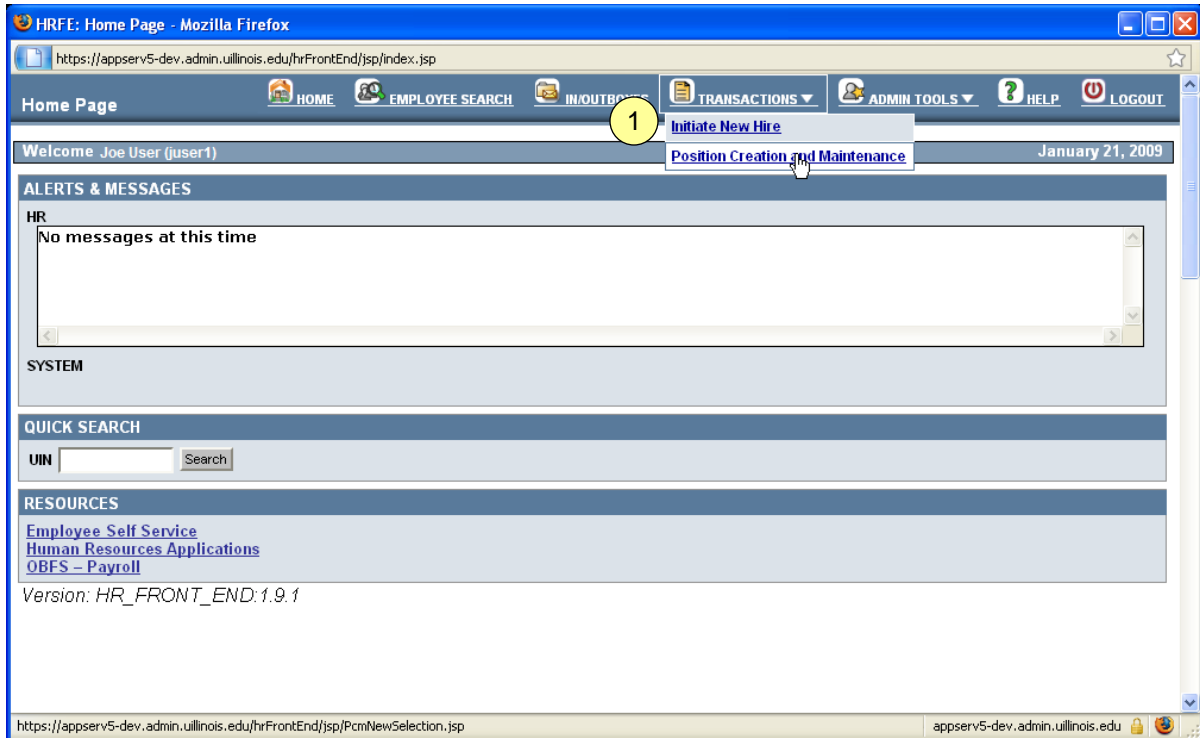

Figure 1: HR Front End Home Page

1.   From the **Transactions** menu, select **Position Creation and Maintenance**.

  *The **Position Selection** screen of the **Position Creation Wizard** appears.*

> **HINT**: If you are maintaining a filled single position, it is quickest to begin an Employee Job Record Change directly from the **Employee Record View** of the incumbent.

Selecting a Position

There are three options for selecting a position on the **Position Selection** screen (see Figure 2). The first two options allow you to maintain an existing position. Use the third option to create a new position. A new position should only be created when there is no acceptable position number to re-use (see Re-Using Positions vs. Creating New Positions).

- **Option 1 – I have a position number**: The Position Creation Wizard defaults to this option once opened. If you enter a known position number in this field, you are taken directly to the **Position Data** screen.

- **Option 2 – Search for a position**: If you choose to search for a position number, the Position Creation Wizard takes you through the **Position Search Results** screen first. The **Incumbent History** is only accessible from the **Position Search Results** screen.

- **Option 3 – Create new position**: If you have confirmed there is no existing position that you can re-used, you can also create a new position. This option takes you directly to the **Position Data** screen.

Figure 2: Position Selection screen

Maintaining an Existing Position and Viewing Incumbent History

There are two ways to select a position for maintenance – typing the position number or searching for the position. Only by searching for the position can you view the **Incumbent History**. The **Incumbent History** is a list of all employees who hold or have held the position.

Figure 3: Entering a Position Number in the Position Selection screen

2. If you *know the position number and do not want to view incumbents*, select **I have a position number**. Type the position number in the field and click **Continue**.

    *The **Position Data** screen appears. (see Figure 8).*

    WARNING: If you type the position number for a single position with an active incumbent an error message appears at the top of the **Position Selection** screen. The message instructs you to access the **Employee Record View** of the incumbent to edit the *Position Data* via an Employee Job Record Change.
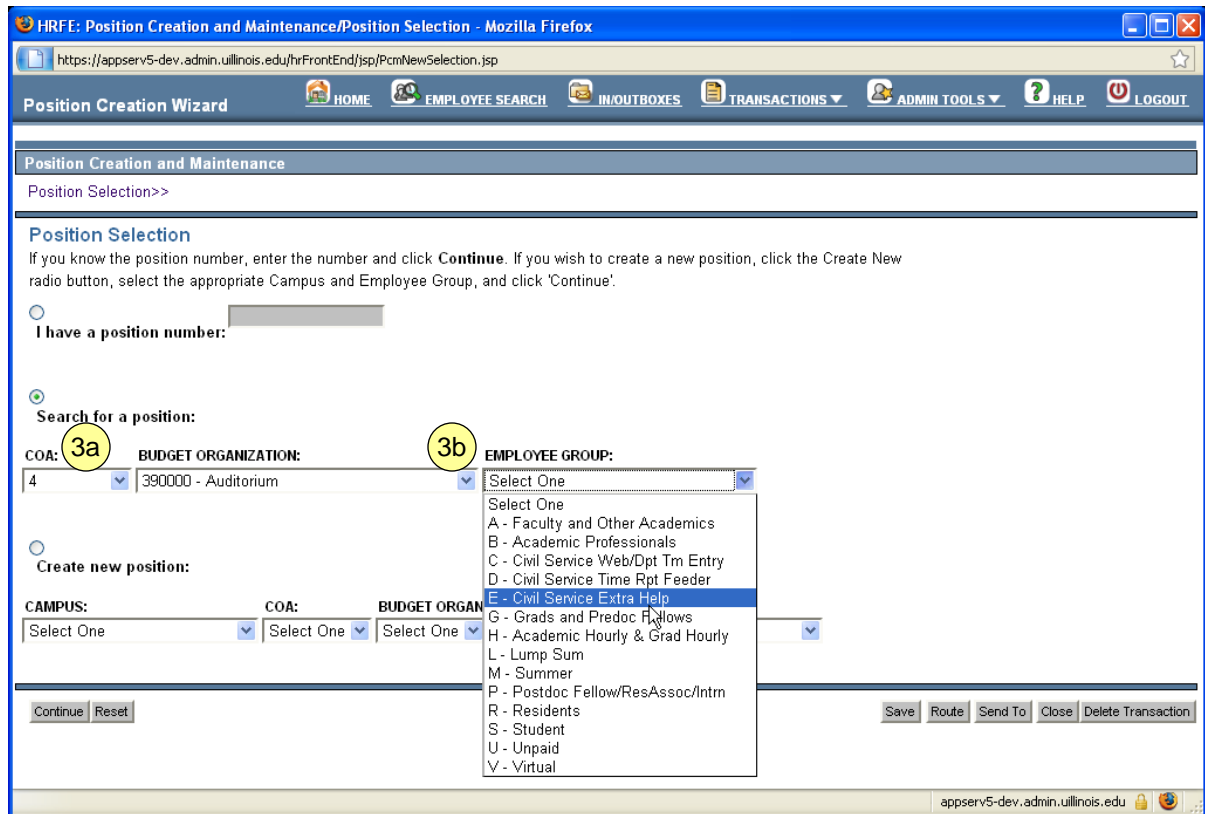
Figure 4: Searching for a position in the Position Selection screen

3. If you do not know the position number, or if you know the position number but wish to view incumbents, you can search for a position.

    a. Select **Search for a position**. Select a value from the **COA** and **Budget Organization** lists.

        *The **Budget Organization** list filters to contain only organizations that are valid for the **COA** selected.*

    b. Select as **Employee Group** from the list and click **Continue**.

        *The **Position Search Results** screen appears.*

Figure 5: Position Search Results screen

> **NOTE**: **Last Incumbent** information is listed for single positions (**Type** *S*) only.

c. To maintain a single filled position, click the incumbent's name in the **Last Incumbent** column. Maintenance of single filled positions requires an Employee Job Record Change transaction.

*The incumbent's **Employee Record View** displays.*

> **WARNING**: If you navigate to the **Employee Record View** at this point, you will not be able to return to the **Position Search Results**. Use the incumbent link only if you intend to maintain a single filled position.

> **HINT**: You can identify a single filled position by looking at the **Type** and **Job End Date** columns. A single filled position has **Type** *S*, and the **Job End Date** is either blank or in the future.

d. If you want to view past and present incumbents for a position, highlight the row for that position and click **Incumbent History** below and to the right of the results table.

*The **Incumbent History** screen appears for the selected position.*
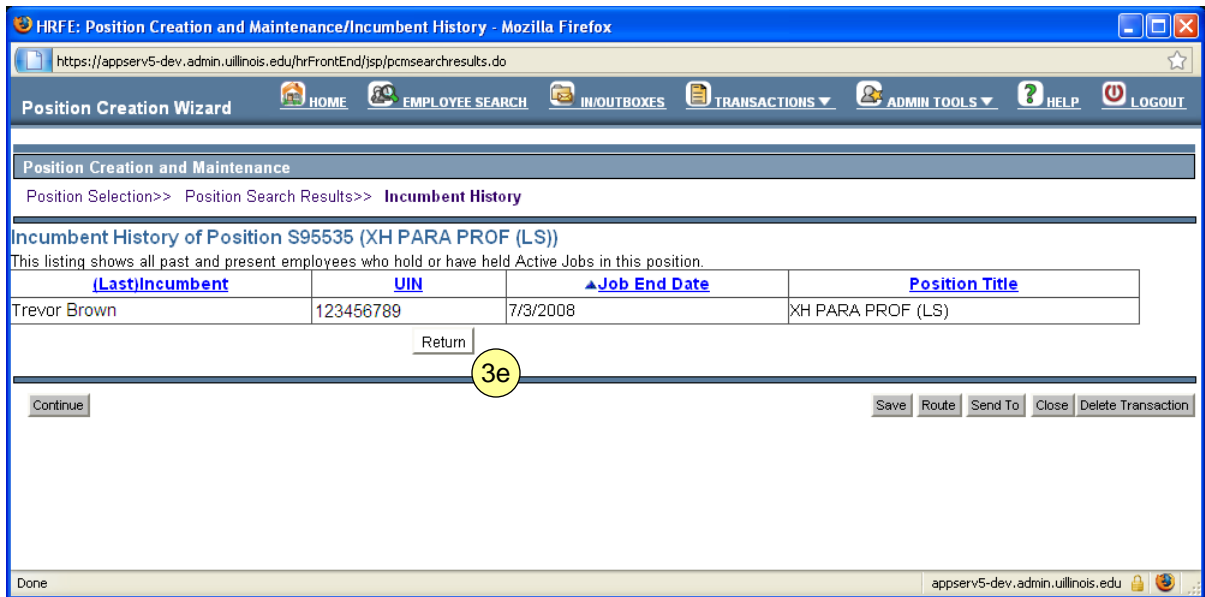
Figure 6: Incumbent History screen

e. From the **Incumbent History**, click **Return** to return to the **Position Search Results** and complete position maintenance.

*The **Position Search Results** screen reappears (see Figure 5).*

f. Select the row that contains the position to be maintained and click **Continue**.

*The **Position Data Screen** appears.*

Creating a New Position

The third option on the **Position Selection** screen is **Create new position**. Before creating a new position, determine whether you can use a position that already exists. (See the Re-Using Positions vs. Creating New Positions section.)
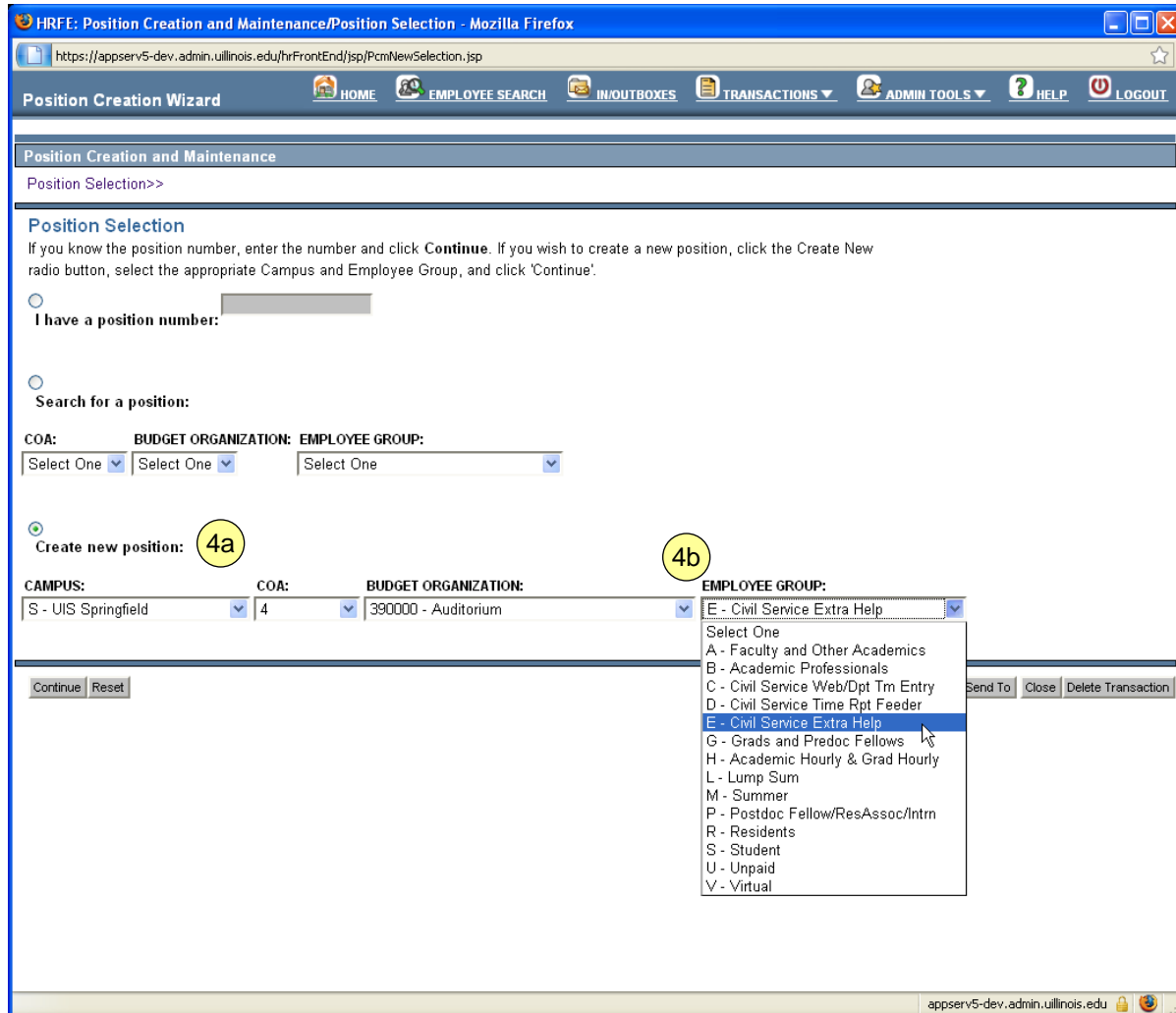
Figure 7: Creating a new position in the Position Selection screen

4. If you need to create a new position:

   a. Select **Create new position**. Choose the appropriate **Campus**, **COA**, and **Budget Organization** for the new position.

      *The **Budget Organization** list filters based on the **COA** selected.*

   b. Select an **Employee Group** from the list and click **Continue**.

      *The **Position Data** screen appears. The **Position #** is automatically assigned by the HR Front End.*

Editing Position Data

Whether you are creating a new position or maintaining an existing position, the final screen of the **Position Creation Wizard** is the **Position Data** screen. On this screen, you can view/edit information related to the position.

Figure 8: Position Data screen

5. Type or select values for the position in the required fields (*). If applicable, add or edit values in additional editable fields.

> **HINT**: Information regarding the required fields is found in *Table 2: Required Position Data fields*. For more information on required and non-required fields, see Online Help. To access Online Help, click **Help** in the navigation bar at the top of the screen.
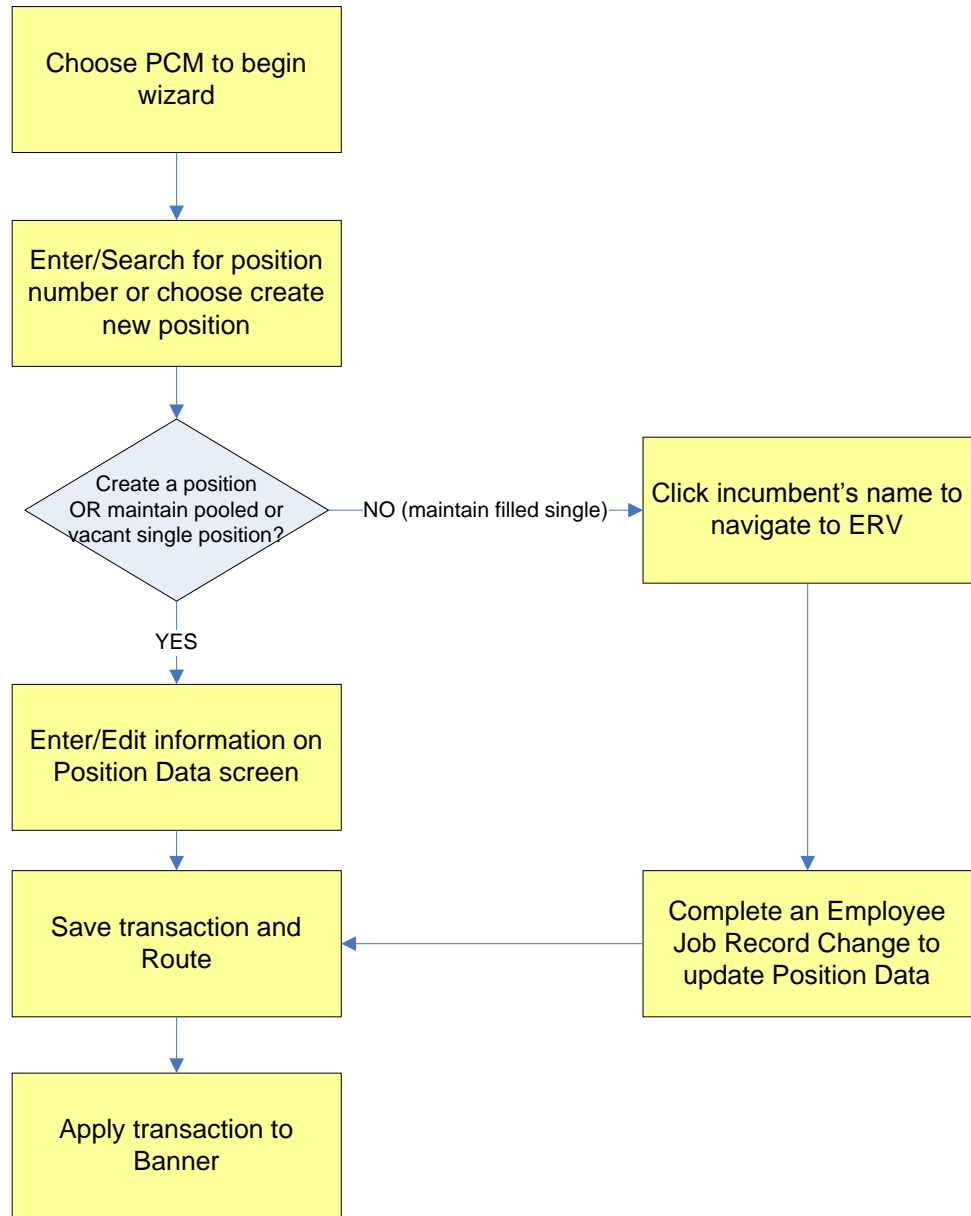
Field Name	Defaults and Allowed Values
Change Date	Defaults to today's date. If the change needs to be retroactive, change this value to the day the change should have taken effect. Future-dated position changes are not allowed.
Position Number	This value is automatically assigned by the HR Front End and is not editable.
Position Class	This list is filtered based on the employee group associated with the position.
Position Title	A default title may appear in this field depending on the employee group.
Position Employee Class	This value defaults based on the position class and is editable. The list is filtered based on • Employee Group selection on the Position Selection screen for new positions • Employee Group already affiliated with the position for existing positions
Position Type	This value defaults based on the employee group and is editable. Allowed values are Single or Pooled.
Position Begin Date	If you are maintaining an existing position, the original begin date defaults.
PAPE#	This field is required for positions with employee group B or Chicago HA positions. If required, choose a value from the list. If the position employee class does not require a PAPE number, this field will not be editable.
Budget Profile	For a new position, this value defaults based on the employee group. It is editable for all employee classes *except* E*, H*, LP, MM, and SA.
Budget COA	This value defaults for an existing position. The field is only editable when creating a new position.
Budget Org	This value defaults based on the Organization selected on the Position Selection screen. When creating a new position, this field in not editable.
Position Labor Distribution	The required fields in this section are COA, Fund, Organization, Account, Program, and Percent. The Total of the Percent values for all labor distribution rows must equal 100. **HINT**: • If an Index code exists for the account, this can be used to automatically fill in many of the required segments. You must type or select the Account code after entering the Index. • It is appropriate to change the **Position Labor Distribution** when there has been a long-term change in funding for the position. If the **Organization** code in the labor distribution changes, it may also be necessary to change the **Budget Org**.

Table 2: Required Position Data fields

*Once you complete the **Position Data** screen, the transaction is ready to be routed and applied to Banner.*

Appendix A – Position Creation and Maintenance Process Flow

```
┌─────────────────────────┐
│   Choose PCM to begin   │
│         wizard          │
└─────────────────────────┘
             │
             ▼
┌─────────────────────────┐
│  Enter/Search for       │
│  position number or     │
│  choose create new      │
│  position               │
└─────────────────────────┘
             │
             ▼
        ╱ Create a ╲
      ╱  position    ╲        NO (maintain filled single)   ┌──────────────────────────┐
     ╱ OR maintain     ╲ ────────────────────────────────▶ │ Click incumbent's name to │
     ╲ pooled or vacant╱                                    │     navigate to ERV       │
      ╲ single        ╱                                     └──────────────────────────┘
        ╲ position? ╱                                                    │
             │ YES                                                       │
             ▼                                                           │
┌─────────────────────────┐                                             │
│  Enter/Edit information │                                             │
│  on Position Data screen│                                             │
└─────────────────────────┘                                             │
             │                                                          │
             ▼                                                          ▼
┌─────────────────────────┐        ┌──────────────────────────┐
│  Save transaction and   │ ◀───── │  Complete an Employee    │
│         Route           │        │  Job Record Change to    │
└─────────────────────────┘        │  update Position Data    │
             │                     └──────────────────────────┘
             ▼
┌─────────────────────────┐
│  Apply transaction to   │
│         Banner          │
└─────────────────────────┘
```

THIS PAGE INTENTIONALLY LEFT BLANK