

Use this task to update position information. This example demonstrates an update to an existing multi-head count position. Updates to a position using this component does not initiate AWE.

Navigation: PeopleSoft Menu > Organizational Development > Position Management > Maintain Positions/Budgets > **Add/Update Position Info**

The screenshot shows the Oracle PeopleSoft interface for 'Add/Update Position Info'. At the top, there is a breadcrumb trail: Favorites > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info. Below this, there are navigation links: Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. The main heading is 'Add/Update Position Info' with a sub-heading 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. Below the tabs is a 'Search Criteria' section with several search fields: Position Number (begins with), Description (begins with), Position Status (=), Business Unit (begins with), Department (begins with), Job Code (begins with), and Reports To Position Number (begins with). There are also checkboxes for 'Include History' and 'Case Sensitive'. At the bottom of the search criteria section are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. Below the search criteria section, there are links for 'Find an Existing Value' and 'Add a New Value'.

Step	Action
1.	When you navigate to the Add/Update Position Info page, the system displays the Find an Existing Value tab, which you use to search for the appropriate position record. If you don't know the position number you can search using other search fields. Enter search criteria in one or more of the search fields.
2.	Click in the Position Number field. 
3.	Enter the desired information into the Position Number field. For this example, enter 40000082 .
4.	Click the Search button. 

Step	Action
5.	In this example, you can see that the Current Head Count is 1 out of 15, indicating this is a partially filled multi-head count position.
6.	To update a position, you must first insert a new, effective-dated row. Click the Add a new row button. 

Step	Action
7.	In the Effective Date field, enter the date on which the updated position data becomes effective or select the appropriate date from the calendar.
8.	For this example, enter a change to the Reports To field. Click in the Reason field. <input type="text"/>
9.	Enter the desired information into the Reason field. For this example, enter RTC (Reports To Change).
10.	Note the Union Code for the position. This determines the Employee Relations Code field selection on the UC Position Data tab.
11.	Make any necessary updates on the Description page. In this example, update the Reports To value.
12.	Click in the Reports To field. <input type="text" value="40001206"/>
13.	Enter the desired information into the Reports To field. For this example, enter 40000909 .
14.	Scroll down to display additional fields and page options. Click the scroll bar.

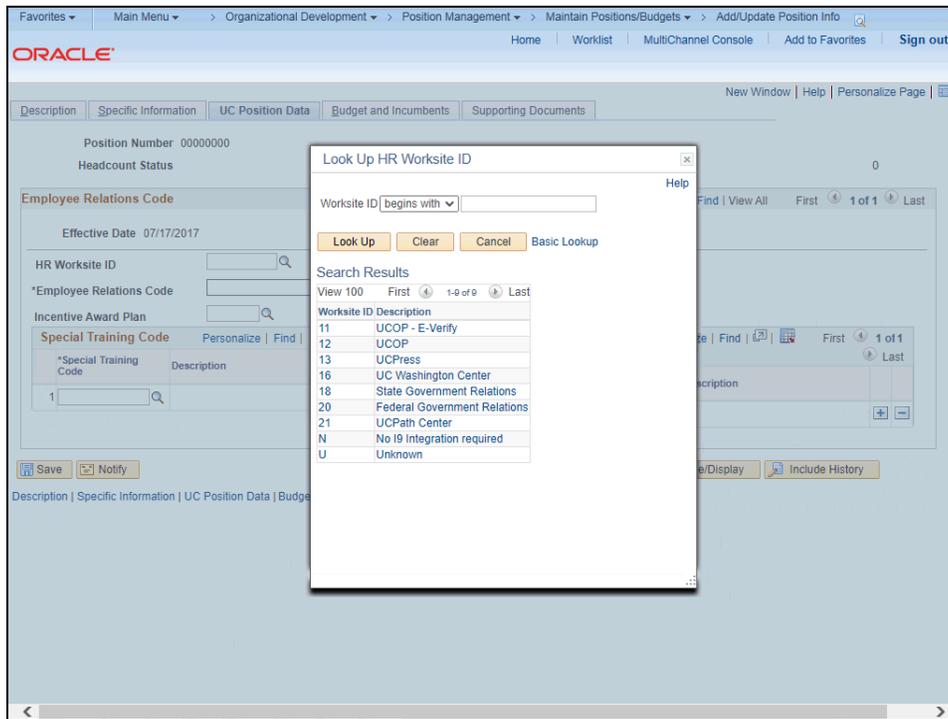
Step	Action
15.	The Work Period field defaults to the standard Work Period assigned to the Job Code for this position. Do not change this field.

The screenshot shows the Oracle UCPath interface for updating position information. The 'Work Period' field is highlighted in the 'Job Information' and 'Salary Plan Information' sections, showing it is set to 'Weekly'. The interface includes a navigation breadcrumb, a breadcrumb trail, and a 'Sign out' link. The form is titled 'Add/Update Position Info' and contains fields for Business Unit, Job Code, Regular Shift, Title, Reg Region, Department, Location, Reports To, Supervisor Lvl, Salary Admin Plan, Grade, Step, Standard Hours, and Work Period. The 'Work Period' field is set to 'Weekly' in both sections. The form also includes a 'USA' flag and an 'Updated on' timestamp of 05/02/2016 2:27:05PM.

Step	Action
16.	After entering the necessary updates on the Description page, click the Specific Information link. Specific Information

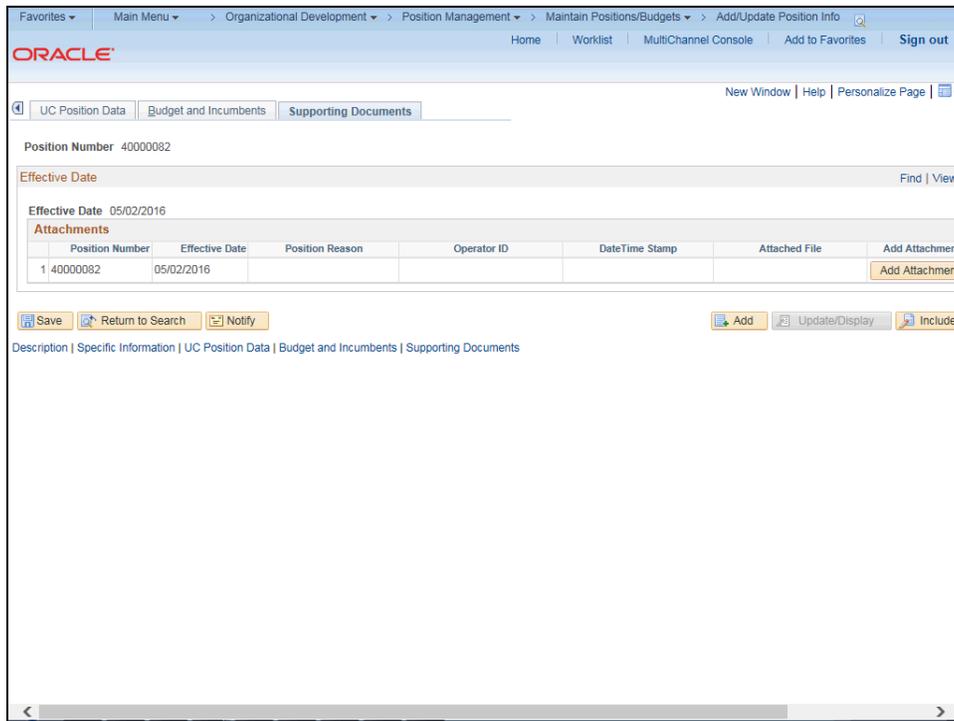
Step	Action
17.	Review the information on the Specific Information page and make any necessary updates.
18.	If this is a position-only change or a vacant position, it's not necessary to select the Update Incumbents check box. If this is an update to a filled position, ensure the Update Incumbents check box is selected to prompt UCPath to cross update the incumbent employee's job data.
19.	Ensure the Include Salary Plan/Grade check box is not selected.
20.	Select the Include FTE check box to prompt the system to update the FTE value on the Job Information page when the Use Position Data functionality is used in the Job Data component. If the Include FTE check box is selected in Position Management , then the FTE field on the Job Data page is not editable.
21.	When you are finished making the necessary updates on the Specific Information page, click the UC Position Data tab. 

Step	Action
22.	Review the information on the UC Position Data page and make any necessary updates.
23.	<p>The HR Worksite ID field drives the majority of UCPath and Tracker integration functionality.</p> <p>This field determines:</p> <ul style="list-style-type: none"> • If the new hire I-9 email is auto-generated from Tracker. • If the position requires E-Verify authorization through Tracker. • If a new I-9 will be used for employees rehired within three years. <p>Refer to your Location's business process on I-9 and Tracker processing to determine the appropriate HR Worksite ID.</p>
24.	An entry must be made in the HR Worksite field. For all new and vacant positions, the system will not allow you to save if the field is blank. This example is for a filled position. Add the appropriate HR Worksite ID value if previously blank.
25.	Click the Look Up HR Worksite ID button. 



Step	Action
26.	<p>If the position does not require a HR Worksite value, choose the value N - No I9 Integration required. Do not use the value U - Unknown as it is for administrator use only.</p> <p>For this example, enter a HR Worksite value directly in the field.</p>
27.	<p>When the Job Code is changed, the Employee Relations Code is removed and required to be re-entered.</p> <p>Notes:</p> <ul style="list-style-type: none"> • If a job code is tied to the BX union code, you must select Stud Academic Title, HEERA as the Employee Relations Code. • If a job code is <u>not</u> tied to the BX union code, the Employee Relations Code <u>must not</u> be Stud Academic Title, HEERA. <p>For this example, the All Others, Not Confidential list item is selected.</p>
28.	<p>When you are finished making the necessary updates on the UC Position Data page, click the Budget and Incumbents tab.</p> <p>Budget and Incumbents</p>

Step	Action
29.	<p>Review the information on the Budget and Incumbents page.</p> <p>This information is view-only; you cannot update the information on this page. You can access the incumbent’s job data if you have security access to view it. Click the Job Data link to display the Job Data component for the incumbent. The system returns you to the Position Data component when you complete your review or after you make changes.</p>
30.	<p>When you are finished viewing information on the Budget and Incumbents page, click the Supporting Documents tab.</p> <p></p>



Step	Action
31.	Review any existing attachments, and if necessary, upload an attachment. In this example, the position does not have any attachments.
32.	When you are finished updating the position, click the Save button. 
33.	You have updated position information. End of Procedure.