

Use this task to add a new position by copying an existing position in UCPath. Adding 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 UCPath interface for 'Add/Update Position Info'. At the top, there is a navigation breadcrumb: 'Favorites > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info'. The Oracle logo is on the left, and 'Home | Worklist | MultiChannel Console | Add to Favorites | Sign out' are on the right. Below the breadcrumb, there are links for 'New Window' and 'Help'. The main heading is 'Add/Update Position Info'. Below this, it says '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'. Under the 'Find an Existing Value' tab, there is a 'Search Criteria' section with several dropdown menus: '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'. Below these are three checkboxes: 'Include History', 'Correct History', and 'Case Sensitive'. At the bottom of the search criteria section are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. At the very bottom of the page, there are links for 'Find an Existing Value' and 'Add a New Value'.

Step	Action
1.	When you navigate to the <b>Add/Update Position Info</b> page, the system displays the <b>Find an Existing Value</b> tab, which you use to search for an existing position.
2.	Click the <b>Add a New Value</b> tab. 

Favorites > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help |

Add/Update Position Info

Find an Existing Value | Add a New Value

Position Number: 00000000

Add

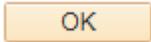
Find an Existing Value | Add a New Value

Step	Action
3.	Accept the default of all zeros in the <b>Position Number</b> field. When you save the record, UCPath automatically assigns the next available position number.
4.	Click the <b>Add</b> button. 

The screenshot shows the Oracle UCPath interface for adding or updating a position. The breadcrumb trail is: Favorites > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info. The page title is 'ORACLE' and there are navigation links for Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. The main content area has tabs for Description, Specific Information, UC Position Data, Budget and Incumbents, and Supporting Documents. The 'Position Information' section includes fields for Position Number (00000000), Headcount Status, Current Head Count (0 out of 0), Effective Date (07/17/2017), Status (Active), Reason (NEW), Position Status (Approved), Status Date (07/17/2017), and Action Date (07/17/2017). The 'Job Information' section includes Business Unit (RVCMP), Job Code, Reg/Temp, Regular Shift, Full/Part Time (Not Applicable), Union Code, Title, Short Title, and Detailed Position Description. The 'Work Location' section includes Reg Region (USA), Department, Location, Reports To, Supervisor Lvl, and Company. The 'Salary Plan Information' section includes Salary Admin Plan, Grade, Step, Standard Hours (0.00), and Work Period. An 'Initialize' button is located in the top right of the form area.

Step	Action
5.	<p>To create a position based on the data from an existing active or inactive position, click the <b>Initialize</b> button.</p> <div style="text-align: center;">  </div>

This screenshot is similar to the previous one but includes a modal dialog box titled 'Default Position Data'. The dialog box contains the text: 'Enter an Effective Date and select Position Number to default from'. It has two input fields: 'Effective Date' (with the value 07/17/2017) and 'Position Number'. There are 'OK' and 'Cancel' buttons at the bottom of the dialog. The background page is dimmed.

Step	Action
6.	The system displays the <b>Default Position Data</b> dialog box. Enter the appropriate effective date and select the position you want to copy.
7.	In the <b>Effective Date</b> field, enter the appropriate date or select it from the calendar.  The position you want to copy must be effective as of the date you enter here. For example, if the position you want to copy is effective as of <b>7/01/2017</b> and you enter an <b>Effective Date</b> value of <b>6/30/2017</b> , the position you want to copy will not be available to select.  For this example, accept the default date.
8.	Enter or search for the <b>Position Number</b> you want to copy.
9.	Enter the desired information into the <b>Position Number</b> field. For this example, enter <b>40052647</b> .
10.	Click the <b>OK</b> button.  

The screenshot displays the Oracle UCPath interface for adding or updating position information. The page is organized into several sections:

- Position Information:** Includes fields for Position Number (00000000), Headcount Status, Current Head Count (0 out of 0), Effective Date (07/17/2017), Status (Active), Reason (NEW), Position Status (Approved), Status Date (07/17/2017), and Action Date (07/17/2017). An 'Initialize' button is visible.
- Job Information:** Includes Business Unit (RVCMP - UC Riverside Campus), Job Code (006760 - LIBRARY AST 3), Reg/Temp (Not Applicable), Regular Shift (Not Applicable), Full/Part Time (Variable), Union Code (CX - Clerical & Allied Services), Title (LIBRARY AST 3), and Short Title (LIBRARY AS).
- Work Location:** Includes Reg Region (USA - United States), Department (D01090 - University Library), Location (P5322 - RIVERA LIB), Reports To (40058034 - LIBRARY AST 4), Supervisor Lvl, Company (UCS - University of California), and Dot-Line.
- Salary Plan Information:** Includes Salary Admin Plan (UCCX), Grade (123), Step, Standard Hours (40.00), and Work Period (W - Weekly).

Step	Action
11.	The <b>Description</b> page displays the <b>Job Information, Work Location and Salary Plan Information</b> values from the position you selected. You can update the information as necessary.

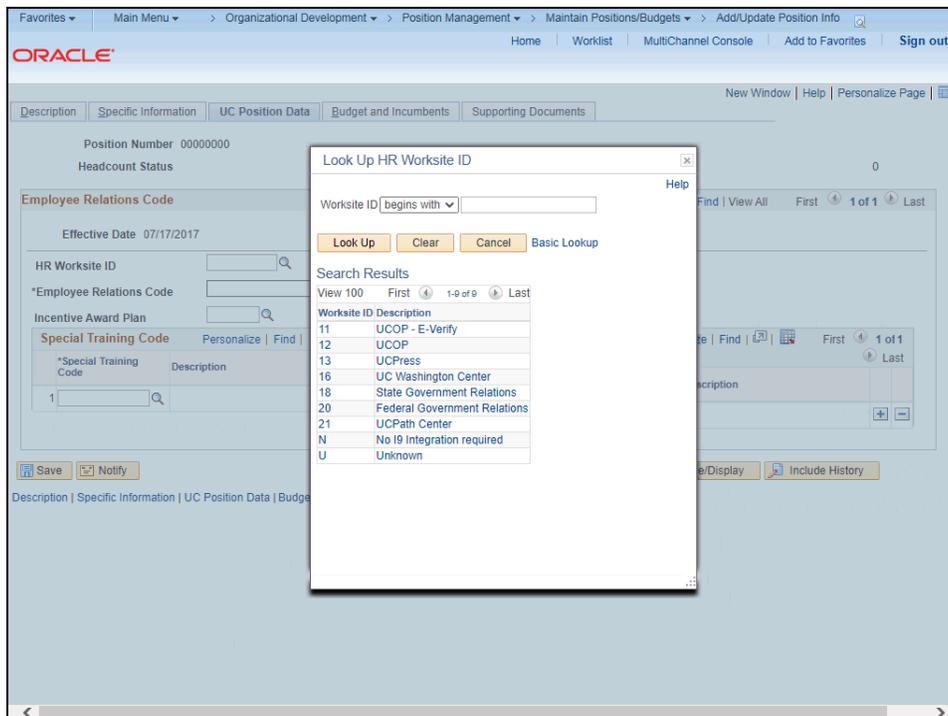
Step	Action
12.	Note the <b>Union Code</b> for the position. This determines the <b>Employee Relations Code</b> field selection on the <b>UC Position Data</b> tab.
13.	Scroll down to display additional fields and page options.  Click the scroll bar.
14.	The <b>Work Period</b> field defaults to the standard <b>Work Period</b> assigned to the <b>Job Code</b> for this position. Do not change this field.

The screenshot shows the Oracle UCPath interface for adding or updating position information. The breadcrumb trail indicates the path: Favorites > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info. The form is titled 'Add/Update Position Info' and includes a 'Sign out' link. The 'Job Information' section contains fields for Business Unit (RVCMP), Job Code (006760), Reg/Temp (Not Applicable), Regular Shift (Not Applicable), Title (LIBRARY AST 3), Full/Part Time (Variable), Union Code (CX), and Short Title (LIBRARY AS). The 'Work Location' section includes Reg Region (USA), Department (D01090), Location (P5322), Reports To (40058034), Supervisor Lvl, and Company (UCS). The 'Salary Plan Information' section shows Salary Admin Plan (UCCX), Grade (123), Step, Standard Hours (40.00), and Work Period (W). A weekly schedule table is displayed with 8.00 hours for Monday through Friday. The form also includes FLSA Status (Nonexempt) and Bargaining Unit (8888). At the bottom, there are buttons for Save, Notify, Add, Update/Display, Include History, and Correct History.

Step	Action
15.	When you are finished reviewing the copied data and making any necessary updates, click the <b>Specific Information</b> link.  <a href="#">Specific Information</a>

Step	Action
16.	<p>Review the details on the <b>Specific Information</b> page and make any necessary updates.</p> <p>When you are finished viewing the default data and making any necessary updates, click the <b>UC Position Data</b> tab.</p> <p></p>

Step	Action
17.	<p>Use the <b>UC Position Data</b> page to enter the <b>HR Worksite ID</b>, <b>Employee Relations Code</b>, <b>Incentive Award Plan</b> (if applicable) and if there are any special training or security clearances required for the position.</p> <p><b>Note:</b> For Lawrence Berkeley National Lab (LBNL1) an additional section appears at the bottom of the page to track <b>Secondary Org Department</b> and <b>Description</b>.</p>
18.	<p>The <b>HR Worksite ID</b> field drives the majority of UCPath and Tracker integration functionality.</p> <p>This field determines:</p> <ul style="list-style-type: none"> <li>• If the new hire I-9 email is auto-generated from Tracker.</li> <li>• If the position requires E-Verify authorization through Tracker.</li> <li>• If a new I-9 will be used for employees rehired within three years.</li> </ul> <p>Refer to your Location's business process on I-9 and Tracker processing to determine the appropriate <b>HR Worksite ID</b>.</p>
19.	<p>An entry must be made in the <b>HR Worksite</b> field. For all new and vacant positions, the system will not allow you to save if the field is blank.</p>
20.	<p>Click the <b>Look Up HR Worksite ID</b> button.</p> 



Step	Action
21.	<p>If the position does not require a <b>HR Worksite</b> value, choose the value <b>N - No I9 Integration required</b>. Do not use the value <b>U - Unknown</b> as it is for administrator use only.</p> <p>For this example, enter a <b>HR Worksite value</b> directly in the field.</p>
22.	<p>Click in the <b>HR Worksite ID</b> field.</p> <input type="text"/>
23.	<p>Enter the desired information into the <b>HR Worksite ID</b> field. For this example, enter <b>822</b>.</p>
24.	<p>The <b>Employee Relations Code</b> value does not populate from the position you are copying; you must select the appropriate value.</p> <p>Click the button to the right of the <b>Employee Relations Code</b> field.</p> <input type="button" value="v"/>
25.	<p>When the <b>Job Code</b> is changed, the <b>Employee Relations Code</b> is removed and required to be re-entered.</p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>• If a job code is tied to the <b>BX</b> union code, you must select <b>Stud Academic Title, HEERA</b> as the <b>Employee Relations Code</b>.</li> <li>• If a job code is <u>not</u> tied to the <b>BX</b> union code, the <b>Employee Relations Code</b> <u>must not</u> be <b>Stud Academic Title, HEERA</b>.</li> </ul>

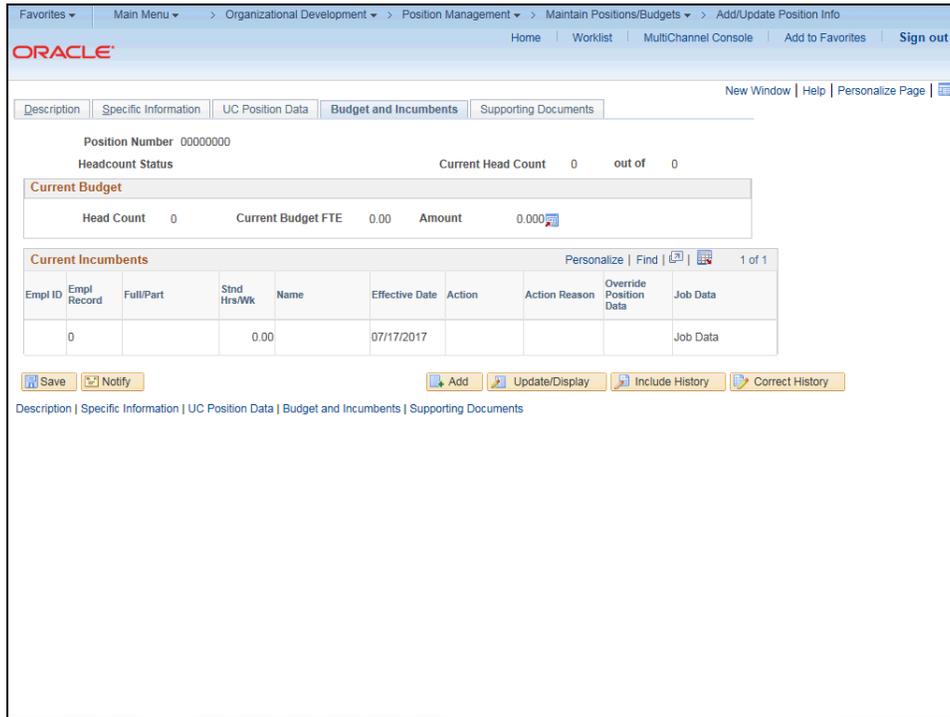
Step	Action
26.	<p>Select the appropriate <b>Employee Relations Code</b>.</p> <p>For this example, click the <b>All Others, Not Confidential</b> list item.</p> <p><i>All Others, Not Confidential</i></p>
27.	<p>Use the <b>Incentive Award Plan</b> field to identify the plan level for which the position is eligible, if applicable.</p> <p>This attribute is used to help facilitate the annual incentive award plan process as well as to track and report on budgeted positions.</p>
28.	<p>If applicable, in the <b>Special Training Code</b> field, enter the appropriate training code value or use the lookup to search for and select it. Use the <b>Add a new row</b> button to add an additional code.</p> <p>For this example, do not enter a training code.</p>
29.	<p>If applicable, in the <b>Security Clearance Type</b> field, enter the appropriate clearance type code or use the lookup to search for and select it. Use the <b>Add a new row</b> button to add an additional code.</p> <p>For this example, do not enter a security clearance code.</p>

The screenshot displays the Oracle UCPath interface for adding or updating a position. The breadcrumb trail indicates the path: Favorites > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info. The form includes several sections:

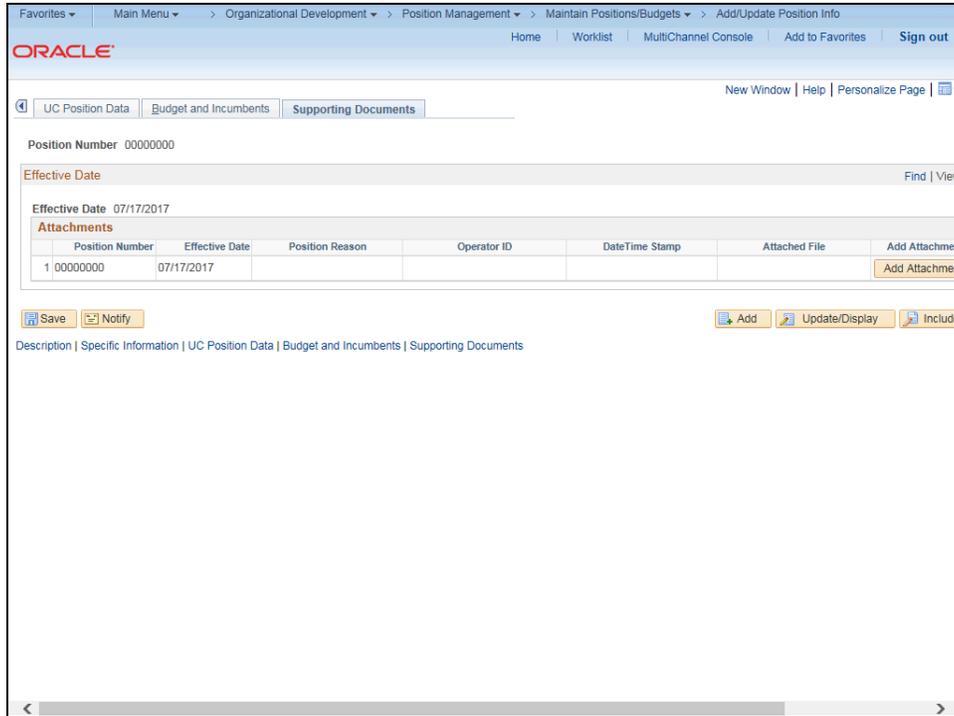
- Position Information:** Position Number 00000000, Headcount Status, Current Head Count 0 out of 0.
- Employee Relations Code:** Effective Date 07/17/2017, Status Active, HR Worksite ID 822, \*Employee Relations Code All Others, Not Confidential, Representation Code Covered.
- Special Training Code:** A table with columns for Special Training Code and Description. It contains one row with a search icon and a plus button to add a new row.
- Security Clearance:** A table with columns for Security Clearance Type and Description. It contains one row with a search icon and a plus button to add a new row.

At the bottom of the form, there are buttons for Save, Notify, Add, Update/Display, Include History, and Correct H.

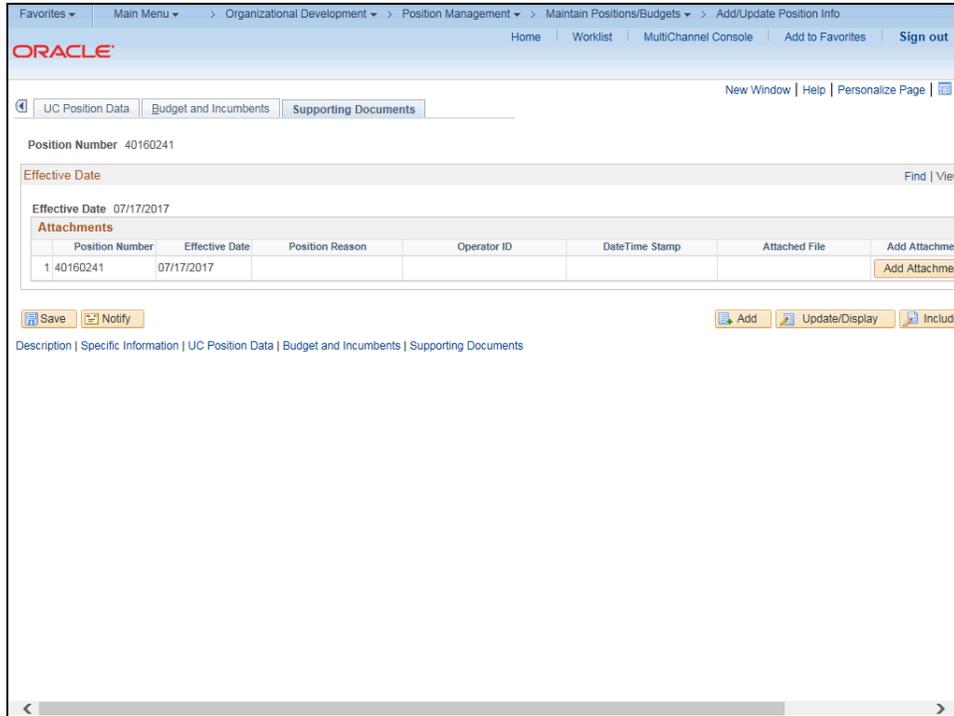
Step	Action
30.	When you are finished reviewing the default data and making any necessary updates on the <b>UC Position Data</b> page, click the <b>Budget and Incumbents</b> tab. 



Step	Action
31.	For a new position, the information on the <b>Budget and Incumbents</b> page is view-only; you cannot update the information on this page. For a new position, there is no current incumbent information.
32.	When you are finished reviewing the data, click the <b>Supporting Documents</b> tab. 



Step	Action
33.	<p>Use the <b>Supporting Documents</b> page to attach one or more supporting documents to your request.</p> <p>To begin the steps for uploading a document, click the <b>Add Attachment</b> button.</p> <p>In this example, you will not attach supporting documentation.</p>
34.	<p>When you are finished reviewing and updating the position data, click the <b>Save</b> button.</p> 



Step	Action
35.	After you save the data, the system automatically assigns the next available <b>Position Number</b> .
36.	You have copied an existing position in UCPath. <b>End of Procedure.</b>