

# University of California, Berkeley

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## Position Management Training

November 2012



# Today's Objectives

Understand Position Management

Manage Hires Using Positions

Add an Academic Employment Instance Using Position

Create a TAM Job Posting for a Position

Create a New Position

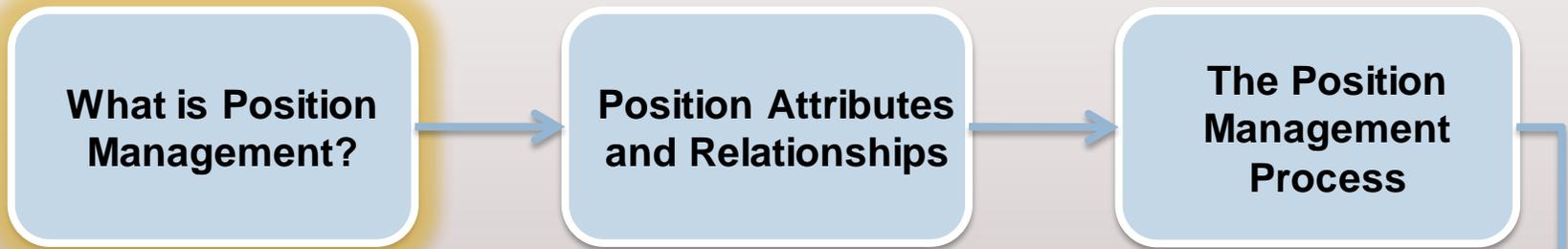
Update Filled Positions

Perform a Job Reclassification

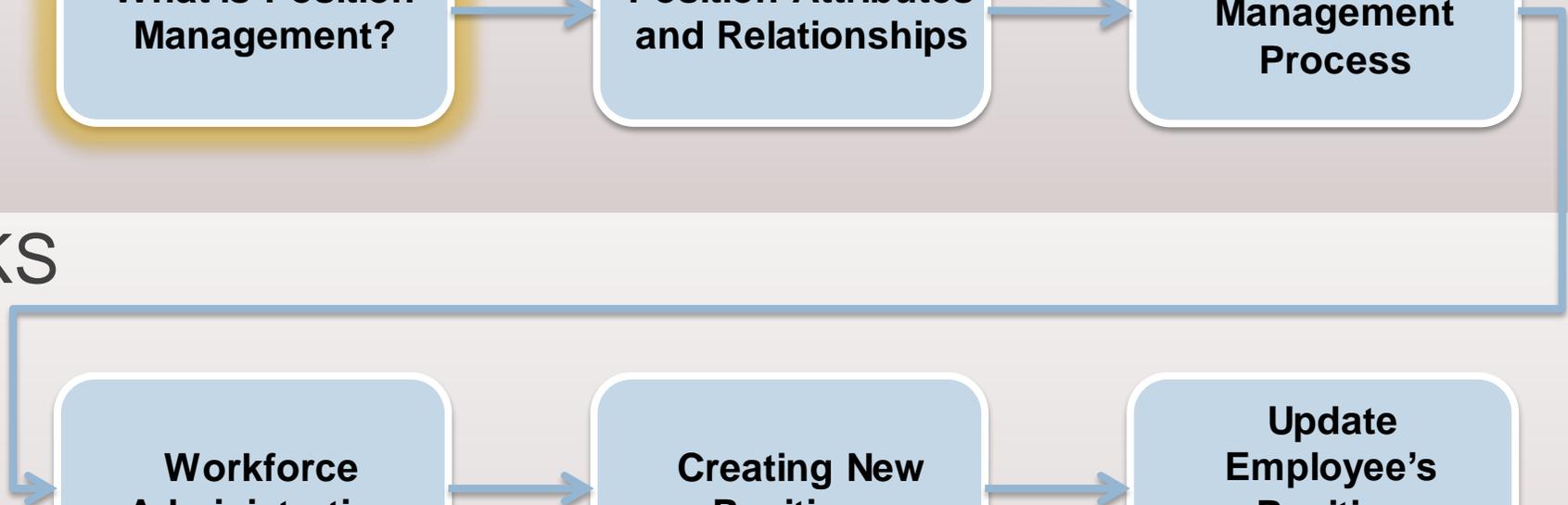
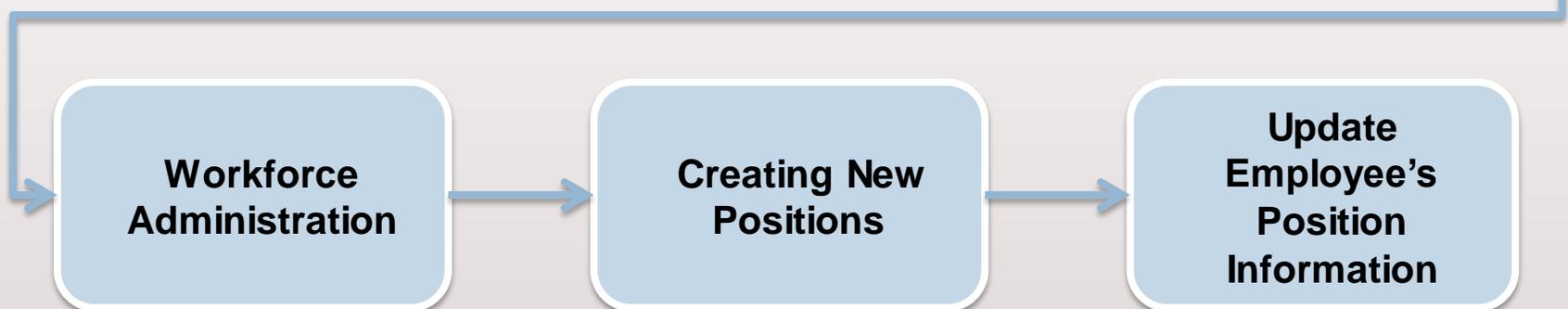


# Topic Map

## CONCEPTS



## TASKS



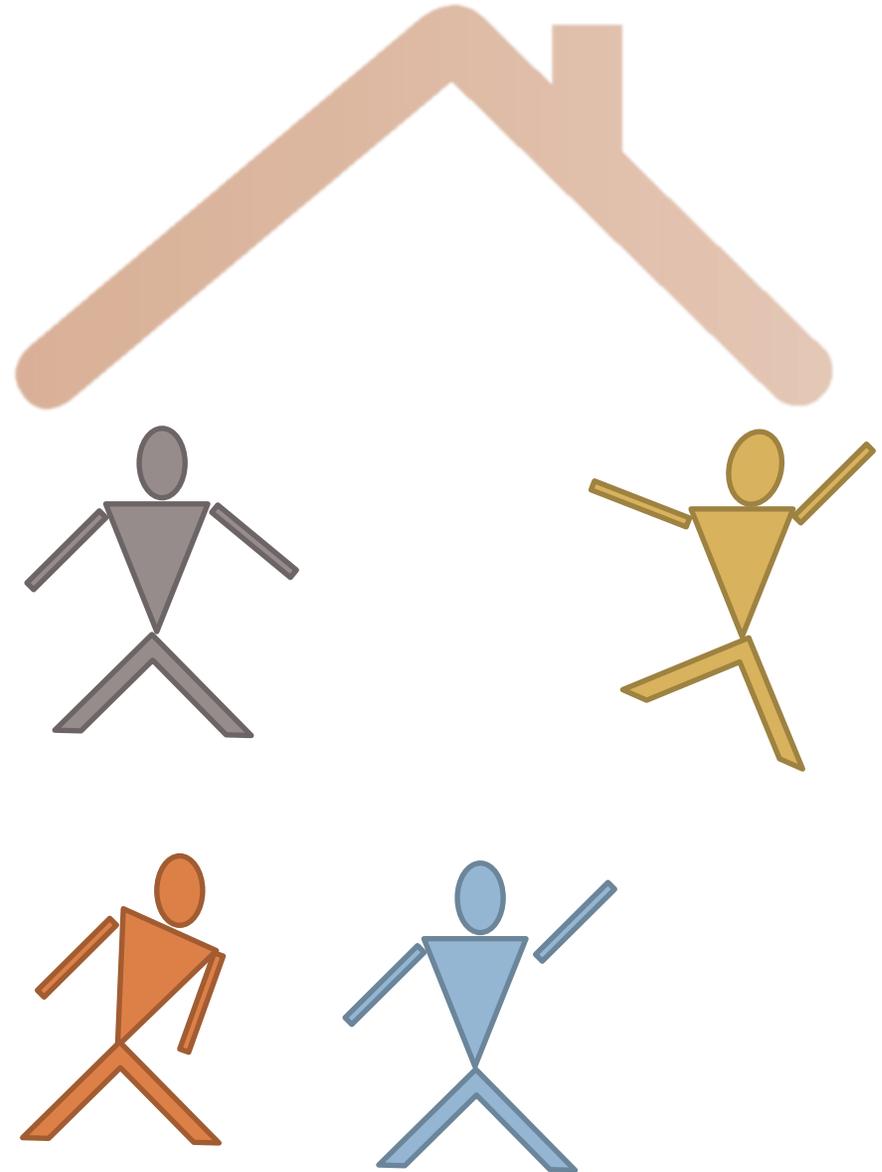


# What is Position Management?

What is Position Management?

The roof to the right represents a department. The figures represent people in the department.

- How many people are in this department?
- How many vacant positions are there?



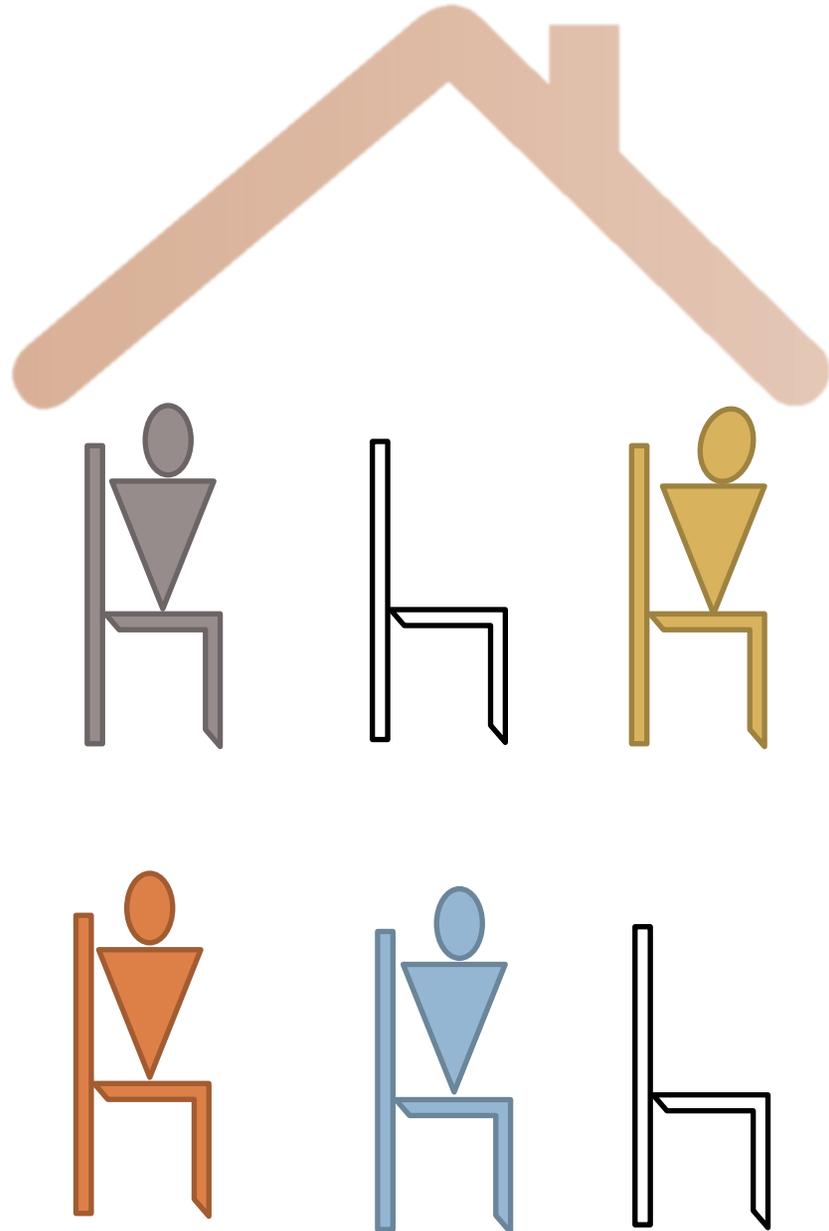


# What is Position Management?

What is Position Management?

Let's have these people take their seats. The chairs represent all the positions in this department.

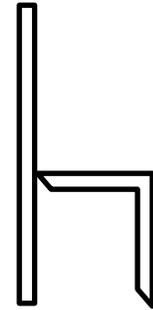
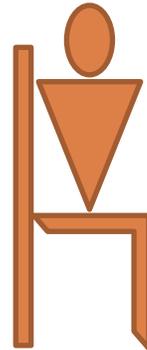
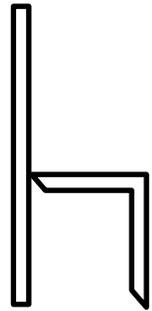
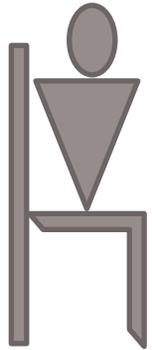
- How many people are in this department?
- How many vacant positions are there?





# Using Position Management

What is Position Management?



00050001

00050002

00050003

00050004

00050005

00050006

Position Management tracks positions by assigning them **position numbers**.

A person holding a position is an **Incumbent**.



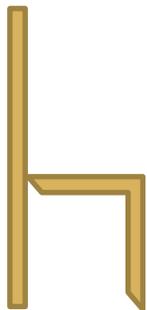
# What is Position Management?

What is Position Management?

- A **new module** within the Human Capital Management (HCM) system
- The **framework** to manage all positions in one central location
  - Filled, vacant, active, or inactive
- A **tool** for making more informed Human Resources and Budgeting decisions
- **Coordinates** 3 components:

## Position:

A job independent of an employee



Administrative Assistant II

## Person:

An employee



“Chris”

## Job:

The union of a position and person



“Chris” having the position of Administrative Assistant II



# What is changing and what is staying the same?

With Position Management, a job is a union of the Person and a Position.

## Current



**Job:**  
"Chris"

Administrative Assistant II

- A **Job** cannot exist without a **Person**
- **No Vacant Positions can be tracked in HCM**

## Future



**Position:**  
Administrative  
Assistant II



**Person:**  
"Chris,"  
an employee



**Job:**  
The union of  
a position and  
person

- A **Job** cannot exist without a **Position** and a **Person**
- A **Position** can exist without a **Job** or a **Person** (a **Vacancy**)



# How is Position Data Different from Job Data?

Where we used to have only Job Data, we now use Job Data and Position Data.

## Current

### Job Data

- Job Code
  - Location
  - Standard Hours
- 
- Salary
  - FTE
  - Pay schedule
  - Funding Chartstring



## Future

### Position Data

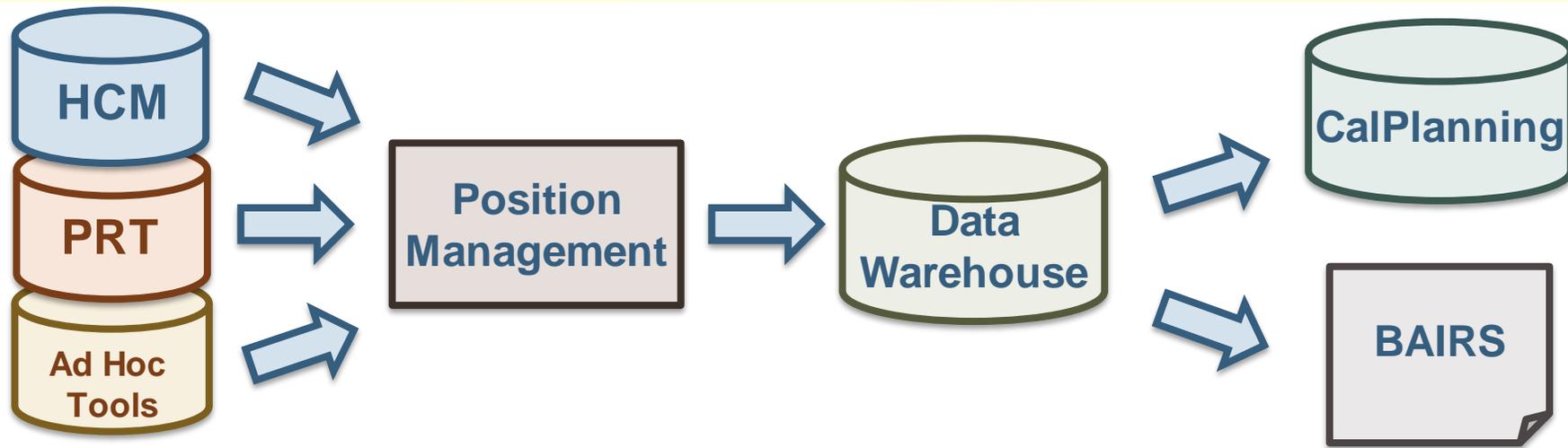
- Job Code
- Location
- Standard Hours
- Position Number (NEW!)
- Headcount (NEW!)
- Position FTE (NEW!)
- Budgeting Chartstring (NEW!)

### Job Data

- Salary
- Job FTE
- Pay Schedule
- Funding Chartstring
- Position Number (NEW!)



# Benefits of Position Management



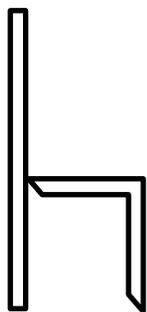
- Single, **central repository** for ALL UC Berkeley institution approved positions across all fund types/sources
  - Track all positions
  - Identify vacancies
  - View historic position data
- Provide Position and Position Funding data for **reporting**
- Reduction or **elimination of redundant data entry** in Budget, HCM, and ancillary systems
- **Building a bridge** between Human Resources and Budgeting



# Position Management – A Review

What is Position Management?

- A **position** is a job in the organization, independent of any particular employee.
- When an employee (incumbent) leaves a position, the **position remains** (vacancy) to be filled again.
- Employees in a **position share the following attributes**: Business Unit, Job Code, Department, Reports To, FTE, and Position Funding.
- An employee in a **job has specific attributes**: Salary, Pay Schedule, and Payroll Funding.



**Position:**

A job independent of an employee



**Person:**

An employee



**Job:**

The union of a position and person



# Summary of Changes

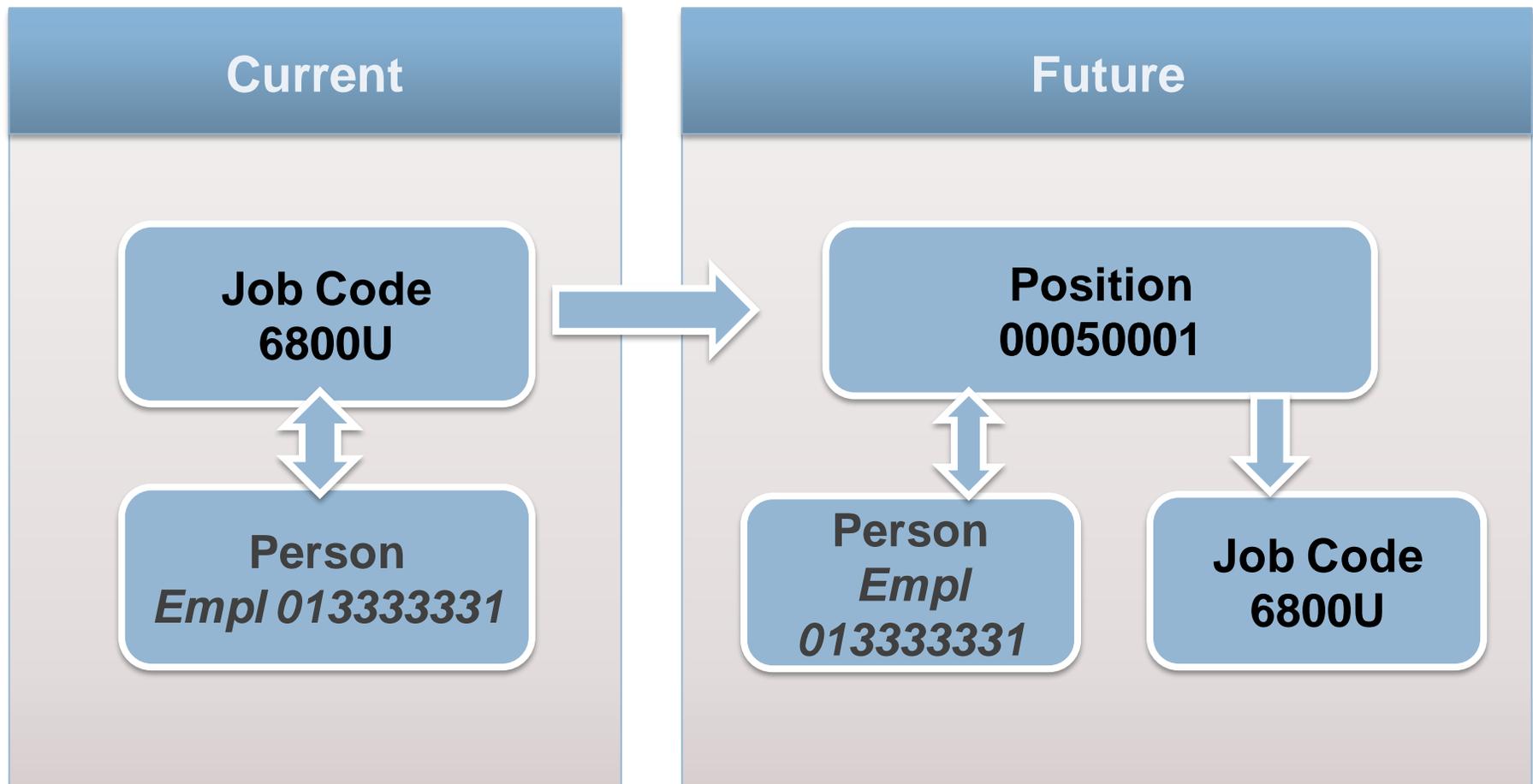
What is Position Management?

- **Similar** to current WFA work procedures
  - Position number is required to hire a person in WFA
  - Position number is recommended to post a position in TAM, or may be required by your department
- **Some new terminology**
- **Funding chartstring(s)** will exist in position data and job data
  - Position chartstring: chartstring for budgeting (on-going)
  - Job chartstring: chartstring for payroll (change to in-year funding)



# A Change in Relationships

When Position Management goes live, all active jobs will be converted to positions at a 1:1 ratio.



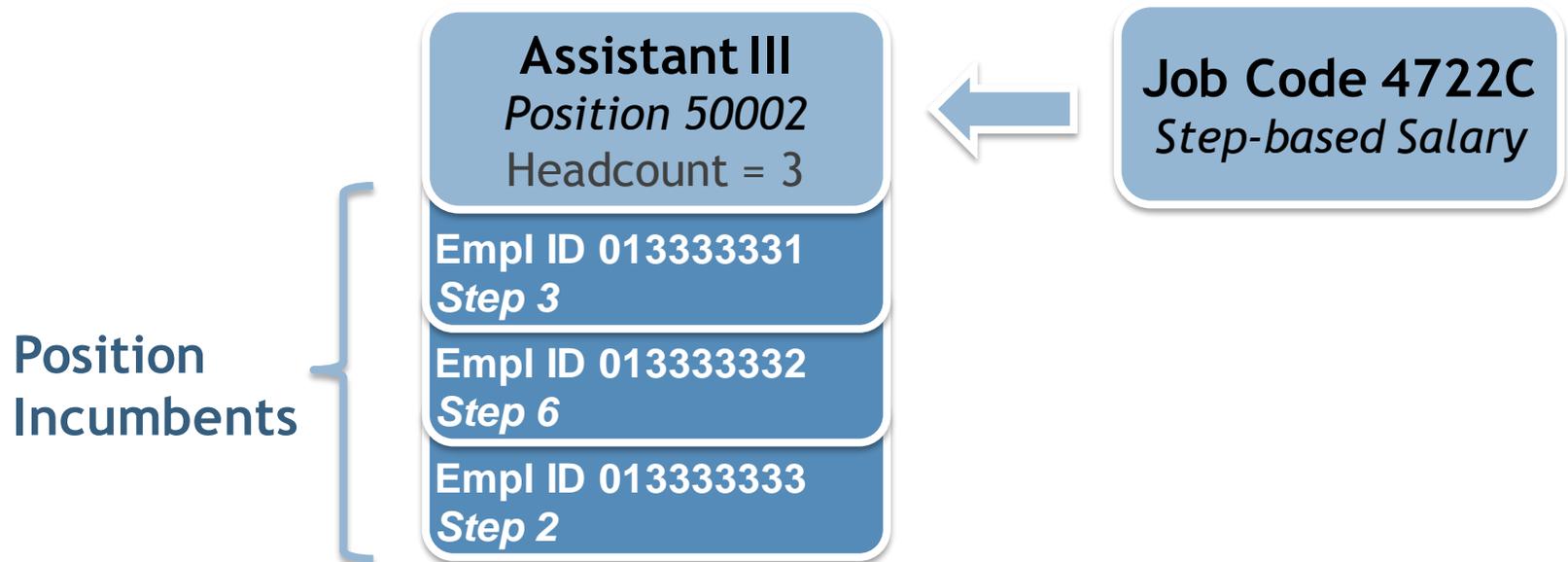


# Relationship Functionality in Position

A **position** can have **multiple incumbents**.

When could this be useful?

A position's **Headcount** indicates the planned maximum number of incumbents for a position.





# Position Attributes

## Navigation in HCM for Position Management:

**Menu**

Search:

- ▷ My Favorites
- ▷ Self Service
- ▷ Recruiting
- ▷ Workforce Administration
- ▷ Payroll for North America
- ▷ Workforce Development
- ▽ Organizational Development
  - ▽ Position Management
    - ▼ **Maintain Positions/Budgets**
    - [Add/Update Position Info](#)
- ▷ Worklist
- [Careers](#)
- [My Personalizations](#)

Main Menu > Organizational Development > Position Management >

**Maintain Positions/Budgets**

Identifies positions within organization, budgets for positions, and allows for creation of job requisitions

[Add/Update Position Info](#)

Enter the description, work location, and other information about a position.



# Position Attributes

## Position Attributes And Relationships

Positions are created and viewed from the **Add/Update Position** page in the Position Management module.

Required fields:

- **Effective Date**
- **Reason (Reason Code)**
- **Job Code**
- **Department**
- **Location**
- **LVL 7 Dept (Dept ID)**
- **Standard Hours**

The screenshot displays the 'Add/Update Position' form with the following sections and highlighted fields:

- Position Information:**
  - Position Number: 00000000
  - Headcount Status: [Blank]
  - Current Head Count: 0 out of 0
  - \*Effective Date:** 10/02/2012
  - \*Reason:** NEW
  - \*Status: Active
  - Action Date: 10/02/2012
  - \*Position Status: Approved
  - Status Date: 10/02/2012
  - Key Position: [Checked]
- Job Information:**
  - \*Business Unit: UCBAL All Berkeley Campus
  - Job Code:** 7300U Applications Programmer 3
  - Manager Level: All Other Positions
  - \*Reg/Temp: Reg
  - \*Full/Part Time: Full-Time
  - \*Regular Shift: N/A
  - Union Code: 99 Non Represented
  - Title: Applications Programmer 3
  - Short Title: IT\_APPS\_3
- Work Location:**
  - \*Reg Region: USA United States
  - Department:** AHURL University Relations
  - Company: UCB UC Berkeley
  - Location:** CAMPUS Main Campus-Berkeley
  - \*LVL 7 Dept:** 17626
  - Reports To: 00000476 Information Systems Manager 3
  - Dot-Line: [Blank]
  - Supervisor Lvl: [Blank]
  - Security Clearance: [Blank]
- Salary Plan Information:**
  - Salary Admin Plan: PSS
  - Grade: 22
  - Step: [Blank]
  - Standard Hours:** 30.00
  - Work Period: W Weekly
  - FTE: 0.750000
  - Mon: 6.00, Tue: 6.00, Wed: 6.00, Thu: 6.00, Fri: 6.00, Sat: [Blank], Sun: [Blank]

Buttons at the bottom: Save, Notify, Previous tab, Next tab, Add, Update/Display, Include.



# Position Attributes - Funding

Use the **Position Funding** tab to enter the funding chartstrings:

- The **Effective Date** (populated from the effective date on the Description tab)
- **GL Business Unit**
- **Account** is filled in from Job Code
- **Fund**
- **DeptID**
- **Program**
- **Chartfields 1-2** (optional)
- **Distrb %**
- **ERNCD**

**Position Funding**

Position Number: 00000000  
Headcount Status: Current Head Count: 0 out of 0

**Budget Data** Find | View All First 1 of 1 Last

Position: 00000000 Position

\*Effective Date: 09/11/2012 Eff Seq: 0 Status: Active Date Entered: 09/11/2012

**Funding Distribution** Customize | Find | View All First 1 of 1 Last

GL BU	Account	Fund	DeptID	Program	Chartfield 1	Chartfield 2	Distrb %	ERNCD
1	51210							



# Viewing a Position

Position Attributes  
And Relationships

Viewing a Position





# Position Management Process

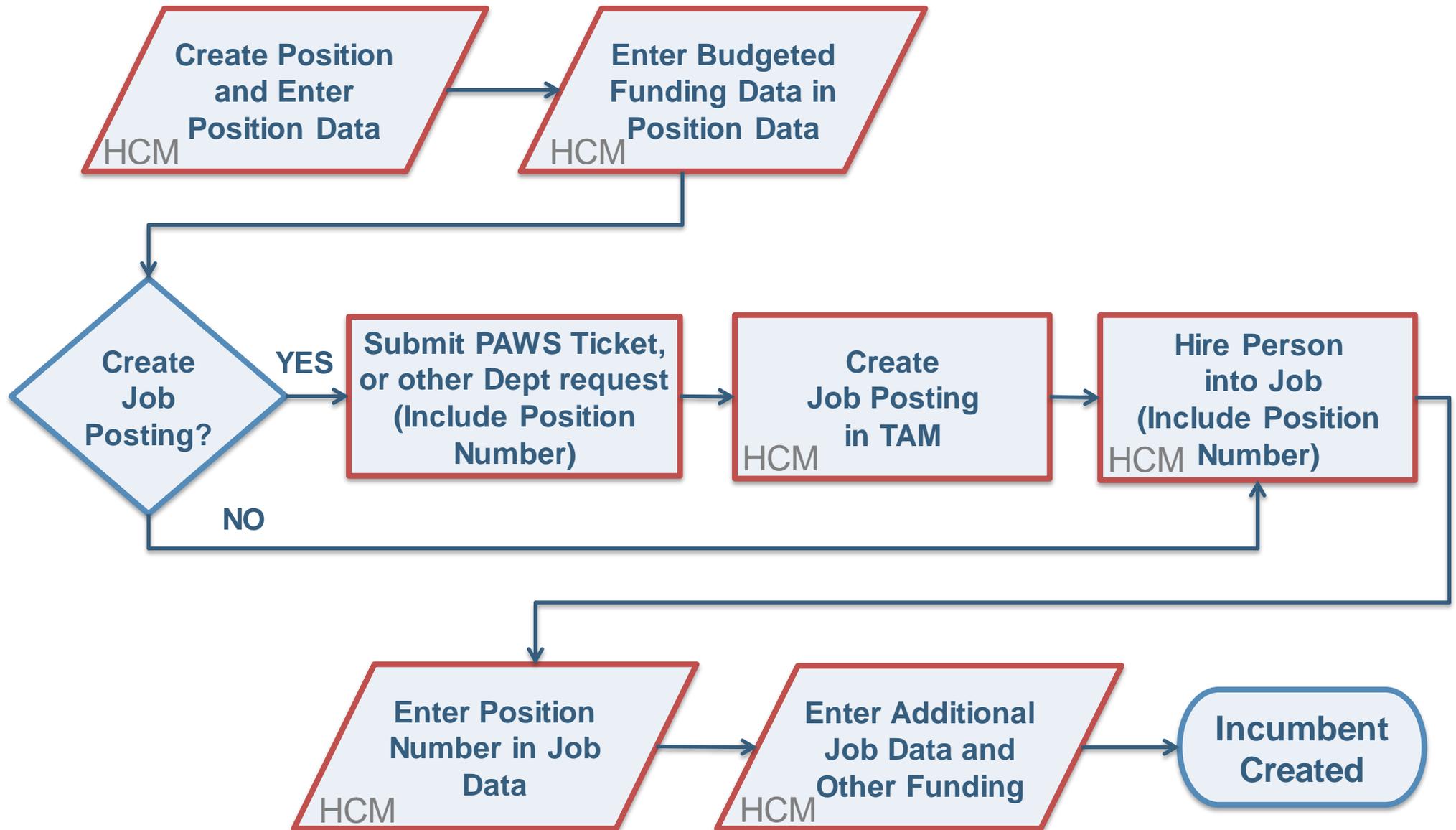
The Position  
Management  
Process

1. Enter approved positions in HCM which automatically creates a Position Number
2. Create job postings for vacant positions in TAM using the Position Number
3. Hire a person by entering a Position Number in the Job Data page
  - Automatically pulls position and funding data into the employee record
4. Some updates made to Position Data automatically flow to Workforce Administration Job Data
  - Updates to position funding data are not automatically pushed to a person's job data (Explained in detail later)



# Where does Position Management fit in our current process?

The Position Management Process





# Most Common Position Management Actions

## Day-to-Day Operations

- Hire a person into a position
- Rehire, Transfer, Promotion, Additional Jobs, Reappointments, etc. using Position
- Enter a termination, creating a position vacancy
- Update Job Data chartstring (change from budgeted)
- Update a Job Data Supervisor ID
- Reclassify a position

## Transitional Actions Due to Conversion

- Update a position's **Reports To** Position Number
- Update a position's **Level 7 Dept** (DeptID)



# Workforce Administration

**In this section, we will cover the following topics:**

- New Hire from a TAM Posting
- Add an Academic POI (Person of Interest) as an Employment Instance
- Rehire a Former Employee
- Transfer an employee into a department



# Hiring a New Employee

Similar to our current process, begin by entering personal information.

Biographical Details | Contact Information | Demographic Details | Eligibility | Organizational Relationships

Person ID: NEW

Name [Find](#) | [View All](#) First 1 of 1 Last

\*Effective Date: 10/03/2012 [31](#) [+](#) [-](#)

Name: Rebecca Wells [Edit Name](#)

Updated by: on:

Biographic Information

Date of Birth: 01/15/1977 [31](#) Years: 35 Months: 8 [Release Information](#)

Biographical History [Find](#) | [View All](#) First 1 of 1 Last

\*Effective Date: 10/03/2012 [31](#) [+](#) [-](#) Alt. Person ID:

\*Gender: Female

\*Marital Status: Unknown

\*Highest Education Level: Bachelor's Level Degree

Student Status: 1-Not Registered Student ID#:  Registered Units:

Updated by: on: 10/03/2012 10:57:21AM

Citizenship

\*Country Of Citizenship/Perm Legal Residence: USA [United States](#) Citizenship Status: C [C](#)

▼ Social Security Number

Social Security Number  Confirm Social Security Number



# Hiring a New Employee

When hiring, entering the Position Number links a person to a job and populates Job Data with Position Data.

## Personal Data

## Job Data

Person ID: NEW

**Add the Relationship**

**Work Location** | Job Information | Payroll | Salary Plan | Compensation

Rebecca Wells EMP ID: 099000005 Empl Rcd #: 0

**Work Location** Find First 1 of 1 Last

HR Status: Active Payroll Status: Active

\*Effective Date: 11/01/2012 Sequence: 0

\*Action: Hire \*Reason: Hire

Last Start Date: 10/03/2012 Termination Date: Future

**Position Number:** 00022552 Technician, Development, III Position Entry Date: 11/01/2012

Prior/Next Employer

**Override Position Data**  Position Management Record

Regulatory Region: USA United States  
Company: UCB UC Berkeley  
Control Unit: COLLS Department Entry Date: 11/01/2012  
Department: PHYSI Physics  
Location: CAMPUS Main Campus-Berkeley

Updated by on 10/03/2012 11:10:39AM Date Created: 10/03/2012

Job Data | [Employment Data](#) | [Earnings Distribution](#)

OK Cancel Apply Previous tab Next tab Refresh



# Hiring a New Employee

The **Reports To Position Number** displays if entered on Position.

The **Supervisor ID** field will be populated from the employee's position if two conditions are met:

1. This position's **Reports To** field was completed.
2. The position indicated in the **Reports To** field has an incumbent.

[Work Location](#) | [Job Information](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

Joann Pierce      EMP      ID: 099000008      Empl Rcd #: 0.

**Job Information** Find First 1 of 3 Last

Effective Date: 10/03/2012      Effective Sequence: 0      Job Category: Principal  
Action: Transfer In      Reason: Transfer to New Department

---

Job Code: 4723C      \_\_\_\_\_ Assistant II      Begin Date: 10/03/2012  
Empl Duration: I-Indefini

Supervisor ID: 099000010      Diane Stiles  
**Reports To: 00022333**

Regular/Temporary: Reg      Appointment End Date:     
Appt Type: 2 - Regular       Fixed       Variable

Work Period: W      Weekly      Full/Part: Full-Time  
\*Empl Rel Code: A-Mgr-NC

Union Code: CX      Clerical Unit      **FTE: 1.000000**

Pay Schedule: MO      Time Code: E  
FLSA Status: N      EEO Class: N      Leave Code: K

Job Data      [Employment Data](#)      [Earnings Distribution](#)



# Hiring a New Employee

All chartstrings are populated from Position, but you must enter the Distrib %.

**Job Earnings Distribution**

Rebecca Wells EMP ID: 099000005 Empl Rcd #: 0

**Earnings Distribution Type** Find First 1 of 1 Last

Effective Date: 11/01/2012 Effective Sequence: 0 Job Category: Future  
Action: Hire Reason:

Standard Hours: 40.00 Work Period: W  
Pay Rate/Amount: 3,766.000000 Comp Freq: M Monthly  
FTE: 1.000000

**Job Earnings Distribution** Find First 1 of 1 Last

Begin Date	End Date	*Earn Code	Distrib %	Pay Rate/Amount
11/01/2012		REG Regular	100.0000	3766.000000

Budgeted FTE:  Work Study Program:  Speed Type:  GL BU: 1

**Earnings Chartfields**

Account	Fund	Dept	Program	Chartfield 1	Chartfield 2
51210	19900 GENERAL FUNDS	13050 PHYSI Gen Ops	40 Instruction & Dept Research		

updated by \_\_\_\_\_ on \_\_\_\_\_

[Job Data](#) [Employment Data](#) Earnings Distribution

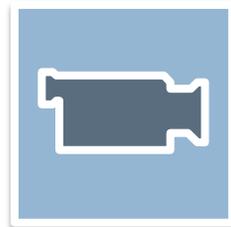
OK Cancel Apply Refresh



# Hiring a New Employee

Workforce  
Administration

Hands On - Managing Hires: New Hire from TAM Job Posting  
Hire Rebecca WellsXXX into Position 00000698





# Academic Employment Instance

To add an employment instance with Position Number to an academic POI, you begin with the **Person Organizational Summary** link.

## Person Summary

Elizabeth Burgess

Person ID: 099000012

[Edit Personal Data](#)

[Add Employment Instance](#)

[Add Contingent Worker Instance](#)

[Add a POI Relationship](#)

### Person of Interest Instances

#### Person of Interest Type

Academic Case Tracking Prehire

#### Work Location

[Job Information](#)

[Payroll](#)

[Salary Plan](#)

[Compensation](#)

Elizabeth Burgess EMP ID: 099000012 Empl Rcd #: 0

Work Location Find First 1 of 1 Last

HR Status: Active Payroll Status: Active

\*Effective Date: 10/03/2012 Sequence: 0

\*Action: Hire \*Reason: Hire

Last Start Date: 10/04/2012 Termination Date: Current

Position Number: 00022553 Professor-Acad Yr Position Entry Date: 10/03/2012

Prior/Next Employer BUW Oxford

Override Position Data  Position Management Record

Regulatory Region: USA United States  
Company: UCB UC Berkeley  
Control Unit: COLLS Department Entry Date: 10/03/2012  
Department: PHYSI Physics  
Location: CAMPUS Main Campus-Berkeley

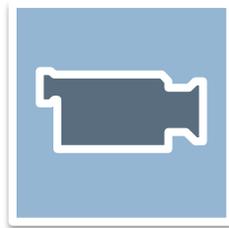
Updated by on 10/04/2012 4:59:33PM Date Created: 10/04/2012

Job Data [Employment Data](#) [Earnings Distribution](#)



# Academic Employment Instance

Demo - Add an Academic Employment Instance  
Hire Elisabeth BurgessXXX into Position 00000699





# Create a TAM Staff Job Posting

Enter the Position Number to create a TAM job posting

## Enter Primary Job Opening Information

Opening Information	
Job Opening Type:	Standard Requisition
Business Unit:	All Berkeley Campus
Position Number:	00004944 Administrative Asst 3
Job Code:	
Posting Title:	Administrative Asst 3

Continue



# Create a TAM Staff Job Posting

A Position Number is:

- **Recommended** but not required for creating a TAM posting
- **Required** to hire a person into a job

## Enter Primary Job Opening Information

Opening Information

Job Opening Type: Standard Requisition

Business Unit: All Berkeley Campus

Position Number:

Job Code: 4722C Assistant III

Posting Title: Assistant III

Continue

Message from webpage

 Warning (20000,907)

This Job Code requires a Position Number at the time of Hire. Please enter the Position Number for the Job Posting, if available.

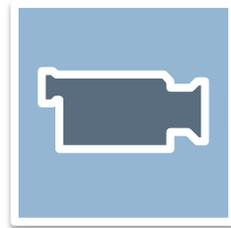
OK



# Create a TAM Staff Job Posting

Workforce  
Administration

Demo - Managing Hires: Create a TAM Posting  
Post Job for Position 00000464





# Transfer into a Department

Transfers will require position number.

## Manage Hires Details Page

Add Job

Select this button in order to pull the person's job information from Recruiting Solutions. You will also have the option to access Job from Personal Data.

Add Job

## Job Data

Work Location | Job Information | Payroll | Salary Plan | Compensation

Joann Pierce EMP ID: 099000008 Empl Rcd #: 0

Work Location Find First 1 of 3 Last

HR Status: Active Payroll Status: Active

\*Effective Date: 10/03/2012 Sequence: 0

\*Action: Transfer In \*Reason: Transfer to New Departm

Last Start Date: 01/14/2008 Termination Date:

Position Number: 00022555 Assistant II Position Entry Date: 10/03/2012

Override Position Data  Position Management Record

Regulatory Region: USA United States

Company: UCB UC Berkeley

Control Unit: COLLS Department Entry Date: 10/03/2012

Department: PHYSI Physics

Location: CAMPUS Main Campus-Berkeley

Updated by: 011686040 on 07/09/2012 9:07:10AM Date Created: 10/04/2012

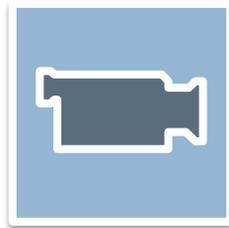
Job Data [Employment Data](#) [Earnings Distribution](#)



# Transfer into a Department

**Workforce  
Administration**

Hands On- Transfers: Into Department





# Managing Positions

**In this section, we will cover the following topics:**

- Adding New Positions
- Updating Existing Positions



# Adding a Position

Create New Positions

## Position Management – Description page

- Position Information
- Job Information
- Work Location
- Salary Plan Information

[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [Position Funding](#)

---

**Position Information** [Find](#) | [View All](#) | [First](#)

Position Number: 00000000  
 Headcount Status: Current Head Count: 0 out of 0  
 \*Effective Date: 10/02/2012   \*Status: Active   
 \*Reason: NEW   Action Date: 10/02/2012  
 \*Position Status: Approved  Status Date: 10/02/2012    Key Position

---

**Job Information**

\*Business Unit: UCBAL   All Berkeley Campus  
 Job Code: 7300U   Applications Programmer 3 Manager Level: All Other Positions  
 \*Reg/Temp: Reg  \*Full/Part Time: Full-Time   
 \*Regular Shift: N/A  Union Code: 99   Non Represented  
 Title: Applications Programmer 3 Short Title: IT\_APPS\_3 [Detailed Position D](#)

---

**Work Location**

\*Reg Region: USA   United States  
 Department: AHURL   University Relations Company: UCB UC Berkeley  
 Location: CAMPUS   Main Campus-Berkeley \*LVL 7 Dept: 17626   AHURL URLIO Dev  
 Reports To: 00000476   Information Systems Manager 3 Dot-Line:    
 Supervisor Lvl:   Security Clearance:

---

**Salary Plan Information**

Salary Admin Plan: PSS   Grade: 22   Step:    
 Standard Hours: 30.00   Work Period: W   Weekly FTE: 0.750000  

Mon	Tue	Wed	Thu	Fri	Sat	Sun
6.00	6.00	6.00	6.00	6.00		

---

Updated on: Updated By:

---



# Adding a Position

Create New Positions

The Position Effective Date must be on or before the hire date.

Description   Specific Information   Budget and Incumbents   Position Funding

---

**Position Information** Find | View All   First ◀ 1 of 1 ▶ Last

Position Number: 00000000 + -

Headcount Status:      Current Head Count: 0 out of 0

\*Effective Date: 10/02/2012      \*Status: Active Initialize

\*Reason: NEW      Action Date: 10/02/2012

\*Position Status: Approved ▾      Status Date: 10/02/2012       Key Position



# Adding a Position

Create New Positions

When the Job Code is entered, data populate from the Job Code table.

Job Information	
*Business Unit:	UCBAL <input type="text"/> All Berkeley Campus
Job Code:	7300U <input type="text"/> Applications Programmer 3
Manager Level:	All Other Positions
*Reg/Temp:	Reg <input type="text"/>
*Full/Part Time:	Full-Time <input type="text"/>
*Regular Shift:	N/A <input type="text"/>
Union Code:	99 <input type="text"/> Non Represented
Title:	Applications Programmer 3
Short Title:	IT_APPS_3 <a href="#">Detailed Position Description</a>



# Adding a Position

Create New Positions

The **Work Location** section contains fields that are required, recommended, and a few fields not currently used.

**Work Location**

\*Reg Region:  United States

Department:  University Relations      Company:

Location:  Main Campus-Berkeley      \*LVL 7 Dept:  AHURL URLIO Dev Programs

Reports To:  Information Systems Manager 3      Dot-Line:

Supervisor Lvl:       Security Clearance:



# Adding a Position

Create New Positions

In the **Salary Plan Information** section, when the **Standard Hours** are changed the **FTE** recalculates.

**Salary Plan Information**

Salary Admin Plan:  Grade:  Step:

Standard Hours:  Work Period:  Weekly FTE: 1.000000

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.00	8.00	8.00	8.00	8.00		

Updated on: Updated By:

**FTE RECALCULATES**

**Note:** The weekday fields are a helpful guide for calculation purposes only. This will not impact payroll or CalTime.



# Adding a Position

Create New Positions

Enter the funding chartstring(s) for the position.

[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | **Position Funding**

Position Number: 00000000  
 Headcount Status: Current Head Count: 0 out of 0

**Budget Data** Find | View All First 1 of 1 Last

Position: 00000000  Position

\*Effective Date: 10/02/2012 Eff Seq: 0 Status: Active Date Entered: 10/02/2012

**Funding Distribution** Customize | Find | View All | First 1-2 of 2 Last

GL BU	Account	Fund	DeptID	Program	Chartfield 1	Chartfield 2	Distrb %	ERNCD
1 1	51210	00686	10044	72			60.0000	REG
2 1	51210	00111	10043	72			40.0000	REG

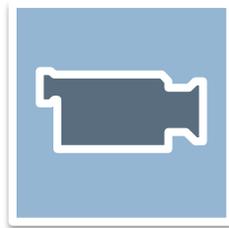
Save | Notify | Previous tab | Next tab | Add | Update/Display | Include History | Correct History



# Adding a Position

Create New Positions

## Creating a Position





# Updating Positions

Update an  
Employee's position  
information

- When making changes to Position Data or Job Data, ask yourself these helpful questions:
  - Is this an on-going change or a temporary salary change?
  - Does the change impact the position or a specific person's job?

If it is an on-going change, change at the position.

In-year change, change at the Job Data.



# Updating Positions

Update an Employee's position information

- Changes to Position Data that automatically flow to Job Data:

**Work Location**

\*Reg Region:  United States

Department:

Location:

Reports To:

Supervisor Lvl:

\*Company:

\*LVL 7 Dept:

Dot-Line:

Security Clearance:

**Salary Plan Information**

Salary Admin Plan:

Grade:

Step:

Standard Hours:

Work Period:

Weekly FTE: 1.000000

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.00	8.00	8.00	8.00	8.00		

Updated on:  Updated By:

Save Notify Previous tab Next tab Add Update/Display Include History Correct History

- Changes to Position that require further action in Job Data:
  - Updating a Position's Funding
  - Performing a Job Reclassification



# Position Updates to Job Data

Update an Employee's position information

Whether you make position changes that automatically update Job Data or not, the first step is the same in both cases.

In **Add/Update Position**, begin by creating a new position row.

**Description** | **Specific Information** | **Budget and Incumbents** | **Position Funding**

**Position Information** Find | View All First 1 of 2 Last

Position Number: 00005120  
Headcount Status: Filled  
Current Head Count: 1 out of 1

\*Effective Date: 10/02/2012  
\*Reason: UPD Position Data Update  
\*Status: Active  
Action Date: 10/02/2012

\*Position Status: Approved Status Date: 08/13/2012  
 Key Position

**Job Information**

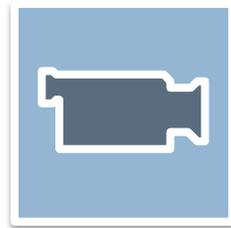
\*Business Unit: UCBAL All Berkeley Campus  
Job Code: 7302U Systems Administrator 1  
Manager Level: All Other Positions



# Automatic Update: Position to Job Data

Update an Employee's position information

Updating a Filled Position





# Job Reclassification

Update an Employee's position information

When performing a **Job Reclassification** (changing the associated job code on a filled Position), you must update the employee's Job Data to complete the update.

## Add/Update Position

Description Specific Information Budget and Incumt

**Position Information**

Position Number: 00148403  
Headcount Status: Filled  
\*Effective Date: 10/09/2012  
\*Reason: UPD Position Data Update  
\*Position Status: Approved Status Date:

**Job Information**

\*Business Unit: UCBAL All Berkeley Campus  
**Job Code: 4722C** Assistant II  
\*Reg/Temp: Reg  
\*Regular Shift: N/A  
Title: Assistant II

## Job Data

Work Location Job Information Payroll Salary Plan

Jaime Santana EMP

**Work Location**

HR Status: Active Payroll Status: Active  
\*Effective Date: 10/09/2012 Sequence:  
\*Action: Job Reclassification \*Rea

Last Start Date: 10/01/2012 Termination Date:  
Position Number: 00148403 Assistant III  
Override Position Data

Work Location Job Information Payroll Salary Plan

Jaime Santana EMP

**Job Information**

Effective Date: 11/01/2012 Effective Sequence:  
Action: Hire

Job Code: 4722C Assistant III



# Job Reclassification

Update an  
Employee's position  
information

Job Reclassification (using same Position)





# Funding Updates to Job Data

Update an Employee's position information

A change to the **Position Funding**, as illustrated below, requires you to update the employee's Job Data to complete the update.

**Description** | **Specific Information** | **Budget and Incumbents** | **Position Funding**

Position Number: 00005159  
Headcount Status: Filled      Current Head Count: 1 out of 1

**Budget Data** Find | View All First 1 of 2 Last  
Position: 00005159 Professor-Acad Yr      Position  
\*Effective Date: 10/03/2012      Eff Seq: 0      Status: Active      Date Entered: 10/03/2012

**Funding Distribution** Customize | Find | View All First 1 of 1 Last

GL BU	Account	Fund	DeptID	Program	Chartfield 1	Chartfield 2	Distrb %	ERNCD
1 1	50210	19900	12835	40			100.0000	REG

**Funding Distribution** Customize | Find | View All First 1-2 of 2 Last

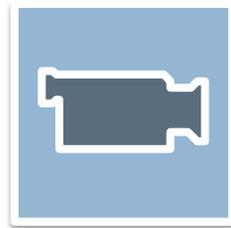
GL BU	Account	Fund	DeptID	Program	Chartfield 1	Chartfield 2	Distrb %	ERNCD
1 1	50210	19900	12835	40			50.0000	REG
2 1	50210	00686	10043	40			50.0000	REG



# Funding Updates to Job Data

Update an  
Employee's position  
information

## Updating Position Funding





# Access to Training Resources

**Training materials:** <http://hrweb.berkeley.edu/hcm>

- Online tutorials
- Online Self-Assessment
- Training Manual
- Job Aids or Quick Reference Guides

## **Further Assistance:**

- Drop-in Lab Sessions Post-Go Live through December and January
- Send your questions to: [positionmanagement@berkeley.edu](mailto:positionmanagement@berkeley.edu)
- WFA Transactional Assistance: [hrmshelp@berkeley.edu](mailto:hrmshelp@berkeley.edu)



# Forum Complete

Congratulations, you have completed Position Management training!

