Position Management
Covering

- When will we implement Position Management?
- Why are we implementing Position Management?
- What is being implemented?
- How do I manage position budgets?
- Reports
- Organizational Charts
Covered (cont’d)

- Portal
- Navigation
- Menu Groups/Menus/Components/Pages
- Searching
When?

- Position Management will be implemented November 1, 2004
- Conversion – creating position data in the production database – will occur October 30th and 31st.
Why?

- Reduced data entry for new hires
- Ability to determine FTEs and headcounts
- Ability to determine vacant positions
- Provides tools for creating departmental organizational charts
- Total position budgeting
- Ability to track a department’s positions and position incumbents over time
What?

- Create and maintain positions in HRMS
- Budget creation and maintenance in HRMS which feeds (eventually) to Financials
What are Positions?

- A Position is the essence of a job which exists independently of any particular employee.
- Usually there are fewer positions than employees.
- Positions differ from jobs in that for a job to exist there must be employee.
- Positions may be vacant.
Positions to Incumbents

- Regular jobs have a one-to-one position to incumbent relationship.

- Students, temporaries, and part-time faculty have a one-to-many position to incumbent relationship.

- Some positions have no incumbents
Positions, Incumbents, Jobs, Huh?

- An incumbent is an employee in a position
- An incumbent has a job.
- There is no job without an incumbent!
- A job must have a position.
- Job is connected to position by “position number” on the job row.
- In some cases, such as a student, an employee may have more than one job in a single position.
- An employee may work in more than one position, and will therefore have more than one job.
Examples: 1 Position/ 1 Job

Mary is in the position Administrative Assistant II for the English department. She has one job, one position.
Examples: 2 Positions/2 Jobs

Joanna is an AA II for the Math department and an AA II for the Computer Science department. This is two positions with one job in each position.
Example 3: 1 Position/2 Jobs

Joel is a student employed by the Athletic department. He mows the sports fields and works at the equipment room. He is in a student position working two different jobs for the Athletic department.
Positions with Incumbents

Each Department will have a Position for:

- 1 Position for each regular job

Each Department will have at a minimum:

- 1 Position per department for students
- 1 Position per department for temporary employees
- 1 Position per department for graduate assistants
- 1 Position per department with faculty for part-time faculty
- 1 Position per department with faculty for a chair/administrator
Positions without Incumbents

Each Department will have a Position without incumbents for:

- Overload
- Overtime
Positions without Incumbents

Each Business Unit has

- a position used for Budget Transfers
- a position for Benefits – Medicare B reimbursement
Positions and Budgets

- Each Position with an incumbent and an annual salary and current distribution will have a budget.
Position Management Budget Architecture

Or How the Thing Works
Data Flow

This transfer will begin with the FY 2006 Budget. Budget changes for FY 2005 must be made in FAST or GL.
Time Line

Implement Position Management

Oct. 04

Implement Financials

Apr. 05

Upload FY 06 Budget

May. 05

FY 06 Begins

Jul. 05

Changes made to FY 06 budgets are fed to GL
Notes

- Budget information for FY 05 may be maintained and changed through the Position Budget pages.
- If you change FY 05 position budgets, you must manually make the changes in FAST before PS Financials are implemented and in PeopleSoft after Financials are implemented.
- Data loaded during Position Management Conversion begins to build the ’06 budget. You may make changes to that data to prepare the FY ’06 budget.
- FY 06 will be loaded after the PS Financials implementation.
- Changes made to FY 06 budgets after PS Financials implementation will feed to General Ledger.
- While there will be grant funded positions in HRMS, and you may create budgets for those positions, they will not be transferred to GL.
The Position Budgeting Tasks

Or What is it exactly I’m supposed to be doing?
Managing Position Budgets

1) Cross-referencing Budget/Position Information
2) Budget Transfers
3) External Budget Transfers (between salary/non-salary accounts)
4) Position Budget Summary
5) Running Reports
6) Creating Budgets (During Budget Creating Season)
Position Management in PeopleSoft

or How Do I Get There from Here?
Using PeopleSoft

- Portal
- Navigation
- Breadcrumbs
- Menus
- Pages
- Search Pages
Portal

Personalize [Content] | [Layout]

Enterprise Menu

- Employee Self-Service
- PeopleSoft
Portal Continued

Personalize Content | Layout

Enterprise Menu

Employee Self-Service

PeopleSoft
- Human Resources Employees
- HR Reporting Database
- SA Books
Human Resources Database
Navigation to Position Budget
Navigation to Position Budget

Home > University of Maine System > HRMS > Use

Component

Position Budget Base
Position Budget Transfer
Position Budget External Trans
Navigation to Inquiry Pages

Home > University of Maine System > HRMS > Inquire

- General Options
- Use
- Setup
- Inquire
- Report 2
- Position Cross-Ref by Employee
- Position Cross-Ref by Pos Data
- Position Budget Summary
Navigation to Reports

Home > University of Maine System > HRMS > Report 2

- General Options
- Use
- Setup
- Inquire
- Report 2

Position Audit Report
Position FTE and Headcount
Search Page

Position Budget Base

Find an Existing Value

SetID: UMSYS
Fiscal Year: 2005
Position Number:
Business Unit:
Department:
Position Class:
Description:
Acct Cd:

Case Sensitive
Search  Clear  Basic Search

Add a New Value
Look Ups

Lookup Business Unit

Business Unit:
Description:

Lookup  Clear  Cancel  Basic Lookup

Search Results

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UMS01</td>
<td>University of Maine at Augusta</td>
</tr>
<tr>
<td>UMS02</td>
<td>University of Maine Farmington</td>
</tr>
<tr>
<td>UMS03</td>
<td>University of Maine Fort Kent</td>
</tr>
<tr>
<td>UMS04</td>
<td>University of Maine at Machias</td>
</tr>
<tr>
<td>UMS05</td>
<td>University of Maine</td>
</tr>
<tr>
<td>UMS06</td>
<td>University of Southern Maine</td>
</tr>
<tr>
<td>UMS07</td>
<td>University of Maine Presque Isle</td>
</tr>
<tr>
<td>UMS08</td>
<td>University of Maine System</td>
</tr>
<tr>
<td>UMS09</td>
<td>University College Outreach</td>
</tr>
</tbody>
</table>

Click on appropriate value
More on Search Pages

Business Unit and Department work independently of each other
Position Management Business Processes

Where All the Answers Are
Business Processes

1) Position Cross-Reference by Employee
2) Position Cross-Reference by Position Data
3) Base Budget Input/Correction: Entering the Base Budget
4) Position Budget Transfer
5) Position Budget External Transfer
6) Position Budget Summary
# Mapping Business Processes to Pages

<table>
<thead>
<tr>
<th>Navigation</th>
<th>Business Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home&gt;University of Maine System&gt;HRMS&gt;Use&gt;Position Base Budget</td>
<td>Base Budget Input/Correction</td>
</tr>
<tr>
<td>Home&gt;University of Maine System&gt;HRMS&gt;Use&gt;Position Base Transfer</td>
<td>Position Budget Transfer</td>
</tr>
<tr>
<td>Home&gt;University of Maine System&gt;HRMS&gt;Use&gt;Position Base External Trans</td>
<td>Position Budget External Transfer</td>
</tr>
</tbody>
</table>
### Mapping BPs to Pages Continued

<table>
<thead>
<tr>
<th>Navigation</th>
<th>Business Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home&gt;University of Maine System&gt;HRMS&gt;Inquire&gt;Position Base Summary</td>
<td>Position Budget Summary</td>
</tr>
<tr>
<td>Home&gt;University of Maine System&gt;HRMS&gt;Use&gt;Position Cross-Reference by Employee</td>
<td>Position Cross-Reference by Employee</td>
</tr>
<tr>
<td>Home&gt;University of Maine System&gt;HRMS&gt;Inquire&gt;Position Cross-Reference by Position</td>
<td>Position Cross-Reference by Position</td>
</tr>
</tbody>
</table>
Business Processes?

1) Business Processes are the How-To for Position Budgeting.
2) You will be notified when there are changes to the process.
3) Additional processes may be required.
4) Find them in P:/Position Management/Budgets
Using Position Management in HRMS

Managing Position Budgets
The Order of Events

1) A new position will be approved and created
2) The HR office will create the position in HRMS
3) The HR office will communicate with the Budget office that the position has been created and provide you with the Position Number.
4) The Budget Office determines the sources of funding and makes the appropriate budget transactions.
Cross-Reference by Position Data

Find an Existing Value

- **SelID:** [LMSYS Query]
- **Business Unit:** [Search]
- **Department:** [Search]
- **Location Code:** [Search]
- **Position Number:** [Search]
- **Position Class:** [Search]
- **Status as of Effective Date:** [Active]
- **Job Code:** [Search]
- **Title:** [Search]

**Search** | **Clear**
---|---

8/29/2013
# Cross-Reference by Position Data

<table>
<thead>
<tr>
<th>SetID:</th>
<th>UMSYS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position:</td>
<td>00015171</td>
</tr>
<tr>
<td>Title:</td>
<td>ERP Web Developer</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Bus Unit:</th>
<th>UMS08</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Dept:</td>
<td>SASDS</td>
</tr>
<tr>
<td>Location:</td>
<td>S00500</td>
</tr>
<tr>
<td>Job code:</td>
<td>7900</td>
</tr>
<tr>
<td>Class:</td>
<td>R</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FTE:</th>
<th>1.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full/Part:</td>
<td>F</td>
</tr>
<tr>
<td>Reg/Temp:</td>
<td>R</td>
</tr>
<tr>
<td>Max Head Count:</td>
<td>1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Incumbents</th>
<th>View All</th>
<th>First</th>
<th>1 of 1</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>EmpID</td>
<td>Rcd</td>
<td>Name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>0031500</td>
<td>0</td>
<td>Kleinmehoff,Hiram K</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Returning to Search
Cross-Reference by Employee

Find an Existing Value

SetID:  
Department:  
Position Number:  
EmplID:  
Name:  

Search  Clear  Basic Search
Cross-Reference by Employee

| SetID:    | UMSYS8 |
| Position: | 00015171 ERP Web Developer |
| Title:    | ERP Web Developer |
| Bus Unit: | UMS08 University of Maine System |
| HR Dept:  | SASDS Admin Systems Dev & Support |
| Location: | 500500 ERP Project Office |
| Jobcode:  | 7900 Professional Specialist, Other |
| Class:    | R Regular |

| FTE:  | 1.00 |
| Full/Part: | F |
| Reg/Temp: | R |
| Max Head Count: | 1 |

### Incumbents

<table>
<thead>
<tr>
<th>EmplID</th>
<th>Rcd</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>0031500</td>
<td>0</td>
<td>Kleinmanhomer, Hiram K</td>
</tr>
</tbody>
</table>

46   8/29/2013  Position Management -- HR
Cross-Reference Pages

Walk-Thru
Cross-Reference Pages

Exercise
## Position Budget Base

### Find an Existing Value

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>SelfID</td>
<td>UMGYS</td>
</tr>
<tr>
<td>Fiscal Year</td>
<td>2005</td>
</tr>
<tr>
<td>Position Number</td>
<td></td>
</tr>
<tr>
<td>Business Unit</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
</tr>
<tr>
<td>Position Class</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>Acct Cd</td>
<td></td>
</tr>
</tbody>
</table>

- [Case Sensitive](#)
- [Search](#)  [Clear](#)  [Basic Search](#)
- [Add a New Value](#)
More Base Budget

Add a New Value

SetID: UMSYS
Fiscal Year: 2005
Position Number: 
Account Code: 

Add

Find an Existing Value
Base Budget Continued…
Base Budget Continued Again

Lookup Position Number

SetID: UMSYS
Fiscal Year: 2006
Position Number: 
Description: 
Business Unit: UMS08
Department: 
Job Code: 
Reports To Position Number: 

Search Results

Position Number Description Business Unit Department Job Code Reports To Position Number
00010377 Director Of Purchasing UMS08 SASDS 5900 00013814
00010858 Systems Analyst UMS08 SASDS 7900 00013814
00011002 Institutional Systems Analyst UMS08 SASDS 7900 00013814
00011316 Analyst/Programmer UMS08 SASDS 7900 00013814
00011555 Senior Technical Support Spec UMS08 SASDS 7900 00013814
00011620 Senior Analyst Programmer UMS08 SASDS 7900 00013814
### Base Budget

<table>
<thead>
<tr>
<th>Position Code</th>
<th>Position Name</th>
<th>Agency</th>
<th>Garnet</th>
<th>Rate</th>
<th>Position Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>00013594</td>
<td>Systems Analyst</td>
<td>UMS08</td>
<td>SASDS</td>
<td>7900</td>
<td>00013814</td>
</tr>
<tr>
<td>00013814</td>
<td>Appl Syst Dev &amp; Supp &amp; ERP Dir</td>
<td>UMS08</td>
<td>SASDS</td>
<td>5900</td>
<td>00011590</td>
</tr>
<tr>
<td>00014125</td>
<td>Analyst Programmer</td>
<td>UMS08</td>
<td>SASDS</td>
<td>7900</td>
<td>00013814</td>
</tr>
<tr>
<td>00014195</td>
<td>Senior Analyst/Programmer</td>
<td>UMS08</td>
<td>SASDS</td>
<td>7900</td>
<td>00013814</td>
</tr>
<tr>
<td>00014292</td>
<td>Senior Analyst-Programmer</td>
<td>UMS08</td>
<td>SASDS</td>
<td>7900</td>
<td>00013814</td>
</tr>
<tr>
<td>00014684</td>
<td>Manager Of Peoplesoft Technica</td>
<td>UMS08</td>
<td>SASDS</td>
<td>7900</td>
<td>00013814</td>
</tr>
<tr>
<td>00014975</td>
<td>Programmer Analyst</td>
<td>UMS08</td>
<td>SASDS</td>
<td>7900</td>
<td>00013814</td>
</tr>
<tr>
<td>00015023</td>
<td>ERP Trainer</td>
<td>UMS08</td>
<td>SASDS</td>
<td>7900</td>
<td>00011625</td>
</tr>
<tr>
<td>00015171</td>
<td>ERP Web Developer</td>
<td>UMS08</td>
<td>SASDS</td>
<td>7900</td>
<td>(blank)</td>
</tr>
<tr>
<td>00015710</td>
<td>Student Employee</td>
<td>UMS08</td>
<td>SASDS</td>
<td>9600</td>
<td>(blank)</td>
</tr>
<tr>
<td>00016274</td>
<td>Grad Assistant</td>
<td>UMS08</td>
<td>SASDS</td>
<td>8000</td>
<td>(blank)</td>
</tr>
<tr>
<td>00017039</td>
<td>Tempn Employee</td>
<td>UMS08</td>
<td>SASDS</td>
<td>4000</td>
<td>00011625</td>
</tr>
</tbody>
</table>
Base Budget – Locating values

Position Budget Base

Add a New Value

SetID: [UMSYS]
Fiscal Year: [2005]
Position Number: [00015171]
Account Code: 

Add

Find an Existing Value
Base Budget -- Error

Clicking add before all required values are filled

Error message!
Base Budget -- More Searching....

Place a partial account to speed up search.

Usable after GL is implemented
### Base Budget -- Almost there!!!

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>8243003201</td>
<td>USM ITV/CLASS WAGE</td>
<td></td>
</tr>
<tr>
<td>8243004103</td>
<td>IT &amp; T OPERATING/SAL&amp;WAGE RAIS</td>
<td></td>
</tr>
<tr>
<td>8243004104</td>
<td>IT &amp; T OPERATING/NONFAC SAL</td>
<td></td>
</tr>
<tr>
<td>8243004112</td>
<td>IT &amp; T OPERATING/NONFAC SAL</td>
<td></td>
</tr>
<tr>
<td>8243004146</td>
<td>IT &amp; T OPERATING/NONFAC TMP</td>
<td></td>
</tr>
<tr>
<td>8243004200</td>
<td>IT &amp; T OPERATING/CLASS WAGE</td>
<td></td>
</tr>
<tr>
<td>8243004201</td>
<td>IT &amp; T OPERATING/CLASS WAGE</td>
<td></td>
</tr>
<tr>
<td>8243004210</td>
<td>IT &amp; T OPERATING/CLASS WAGE</td>
<td></td>
</tr>
<tr>
<td>8244100100</td>
<td>UNET-ORONO SUPPORT SERVICE/NON</td>
<td></td>
</tr>
</tbody>
</table>
Base Budget: One more click!

Position Budget Base

Add a New Value

SetID: UMSYS

Fiscal Year: 2005

Position Number: 00015171

Account Code: 8243004104

Add

Find an Existing Value
Finally! The Base Budget Page!

<table>
<thead>
<tr>
<th>SetID:</th>
<th>UMSYS</th>
<th>Fiscal Year:</th>
<th>2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position:</td>
<td>00015171 ERP Web Developer</td>
<td>Status:</td>
<td>A</td>
</tr>
<tr>
<td>Business Unit:</td>
<td>UMS08 SASDS</td>
<td>Location:</td>
<td>S00500</td>
</tr>
<tr>
<td>Max Head Cnt:</td>
<td>1</td>
<td>FTE:</td>
<td>1.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Full/Part:</td>
<td>F</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Reg/Temp:</td>
<td>R</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Class:</td>
<td>Regular</td>
</tr>
</tbody>
</table>

**Base Budget**

<table>
<thead>
<tr>
<th>Acct Cd</th>
<th>Description</th>
<th>Base Amt</th>
</tr>
</thead>
<tbody>
<tr>
<td>8243004104</td>
<td>IT &amp; T OPERATING/NONFAC SAL</td>
<td>0</td>
</tr>
</tbody>
</table>
The Base Budget Page

Demonstration
Base Budget Input Notes

- Fringe amounts are automatically calculated based on the account code(s) of the position budget.
- The chartfield tab won’t have values until the Financials implementation in April.
- You may enter FY 05 budget information but it will not feed to PS General Ledger. You must manually enter that information.
- Grant funded positions will exist in HRMS. Budging is optional but will not feed to GL.
- Only Fund Code 00 and 03 (Ledger 2 and 3) position budgets will feed to General Ledger.
Position Base Budget

Walk-Thru

Exercise
Position Budget Transfer Notes

- Use this process when transferring between salary accounts.
- Transfers may be permanent or temporary.
- Permanent transfers will roll to the next fiscal year’s base budget. Temporary transfers will not roll.
- You may not make both a temporary and permanent transfer for the same position on the same transaction.
- Use comments!
- Fringe amounts are calculated for transfers.
- Total of salary and fringe transfers must net to zero.
Position Budget Transfer

Walk Thru

Exercise
Different Fringe Rates

- This occurs when the transfer is between positions/accounts with different fringe rates.
- You must adjust the salary so that the net of the salary and fringe are equal.
- This will require a manual calculation:
  "TO" salary = "FROM" Net / ("TO" FRINGE RATE + 1)
- Rounding rules may cause $1 difference.
Fringe Rates

Walk-Thru

Exercise
The Funky $1 Thing

Walk-Thru

Exercise
## Position Budget External Transfer

SetID: UMSYS  
Fiscal Year: 2005

<table>
<thead>
<tr>
<th>Position</th>
<th>Position Budget Transfers</th>
<th>Status</th>
<th>A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
<td>UMS08</td>
<td>HR Dept</td>
<td>SOOT</td>
</tr>
<tr>
<td>Location</td>
<td>500100</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Max Head Cnt: 999  
FTE: 0.00  
Full/Part: F  
Reg/Temp: T  
Class: Bud Trans

### Position Budget Transfer Detail

<table>
<thead>
<tr>
<th>Position</th>
<th>Acct Cd</th>
<th>Perm Amt</th>
<th>Temp Amt</th>
</tr>
</thead>
<tbody>
<tr>
<td>00018401</td>
<td></td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

### Eternal Budget Transfer Detail

<table>
<thead>
<tr>
<th>Perm Amt</th>
<th>Temp Amt</th>
<th>Action Date Date Seq</th>
<th>User ID</th>
<th>Trans ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>0</td>
<td>10/14/2004</td>
<td>CMITCHELL</td>
<td></td>
</tr>
</tbody>
</table>

8/29/2013  
Position Management -- HR
Budget External Transfer Notes
Salary to Non-Salary

- First transfer amounts to Xfer account/position using the Budget Transfer page.
- Next use the Budget External Transfer page to transfer from Xfer account to non-salary account.
- Temporary transfers will not roll to the next FY budget.
- Requires use of the Budget Xfer position/account.
- Fringe amounts are calculated on the position side of the transaction.
Budget External Transfers: Non-salary to Salary Accounts

- First use the External Transfer page to transfer from non-salary account to Xfer account/position.
- Next, use Budget Transfer page to transfer from Xfer account to salary account.
- Temporary Transfers don’t roll to next FY Budget
- Fringe amounts are calculated on the position side of the transaction.
- Requires use of Xfer account/position
Position Budget External Transfer

Walk Thru

Exercise
### Position Budget Summary

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>SetID</td>
<td>UMSYS</td>
</tr>
<tr>
<td>Fiscal Year</td>
<td>2005</td>
</tr>
<tr>
<td>Business Unit</td>
<td>University of Maine System</td>
</tr>
<tr>
<td>HR Dept</td>
<td>Office of the Treasurer</td>
</tr>
<tr>
<td>Base Bud</td>
<td>160,000</td>
</tr>
<tr>
<td>Perm Xfer</td>
<td>0</td>
</tr>
<tr>
<td>Temp Xfer</td>
<td>0</td>
</tr>
<tr>
<td>Curr Bud</td>
<td>160,000</td>
</tr>
</tbody>
</table>

#### Choose a Position Class
- **Position Class:** Regular

#### Position Class

<table>
<thead>
<tr>
<th>Class</th>
<th>Base Bud</th>
<th>Perm Xfer</th>
<th>Temp Xfer</th>
<th>Curr Bud</th>
</tr>
</thead>
<tbody>
<tr>
<td>R</td>
<td>160,000</td>
<td>0</td>
<td>0</td>
<td>160,000</td>
</tr>
</tbody>
</table>

#### Position
- **Position:** 00010515 Senior Financial Analyst
- **Base Bud:** 10,000
- **Perm Xfer:** 0
- **Temp Xfer:** 0
- **Curr Bud:** 10,000

[Return to Search](#)
Position Budget Summary Notes

- Inquiry Only
- View all positions in a particular class in a department
- View Transfers, Fringe budgets, incumbents for that position.
Position Budget Summary

Walk-Thru

Exercise
Position Management Budgets

The Rest of the Story....
Running Reports
Running Reports

- Reports are available through Navigation
- Report output comes out in PDF form in your browser OR
- Report output can saved as a comma delimited file
- You can save the output on your desktop to e-mail to others
- Reports ordered/sorted by chartfields will need to be written after the Financials Go-Live.
Run Controls

Find an Existing Value

Run Control ID: [ ]

Case Sensitive: [ ]

Search: [ ]

Advanced Search

Add a New Value
What are Run Controls?

- Run Controls are a report definition
- Set values for parameters for which the report will run
- Can save various Run Controls for the same report
Creating a Run Control ID

Add a New Value

Run Control ID: CJM

Find an Existing Value
Run Control IDs

Home > University of Maine System > HRMS > Report 2 > Position Audit Report

Run Control ID: CJM

Report Parameters

Fiscal Year: 2005
Business Unit: UMS08 (leave blank for all business units)

Run

Report Manager
Process Monitor
## Process Scheduler Request Page

**User ID:** POSBUD1  
**Run Control ID:** CUM

<table>
<thead>
<tr>
<th>Server Name</th>
<th>Run Date</th>
<th>Run Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>FSNT</td>
<td>10/12/2004</td>
<td>5:09:01PM</td>
</tr>
</tbody>
</table>

**Recurrence:** FS003.properties, FSUNX.properties

**Time Zone:**

**Process List**

<table>
<thead>
<tr>
<th>Select</th>
<th>Description</th>
<th>Process Name</th>
<th>Process Type</th>
<th>*Type</th>
<th>*Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️</td>
<td>Position Audit Report</td>
<td>UMPER034</td>
<td>SQR Report</td>
<td>Web</td>
<td>PDF</td>
</tr>
</tbody>
</table>

**Buttons:**

- **OK**
- **Cancel**
Back to Run Control Again

Home > University of Maine System > HRMS > Report 2 > Position Audit Report

Run Control ID: CJM

Report Manager  Process Monitor

Process Instance: 107410

Report Parameters

Fiscal Year: 2005

Business Unit: UMS08 (leave blank for all business units)
Report Manager: Checking the Status of your Report

User: POSBUD1
Status: 
Process Type: 
Last: 1 Days

Report ID: 76305 107416
Report Description: Position Audit Report
Request Date/Time: 10/12/2004 5:10:02PM
Format: Acrobat (*.pdf)
Status: Processing
Details:
### Report List

<table>
<thead>
<tr>
<th>Select</th>
<th>Report Proc ID</th>
<th>Request Date/Time</th>
<th>Status</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>76305 107410</td>
<td>10/12/2004 5:10:02PM</td>
<td>Posted</td>
<td>Details View</td>
</tr>
</tbody>
</table>

**View Reports For**

- **User:** PO8BUD1
- **Process Type:**
- **Status:**
- **Last:** 1 Days
- **Refresh**
Report Manager: Viewing Results Continued

Report/Log Viewer

<table>
<thead>
<tr>
<th>Instance:</th>
<th>107410</th>
<th>Type:</th>
<th>SQR Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td>UMPER034</td>
<td>Run Cntl ID:</td>
<td>CJM</td>
</tr>
<tr>
<td>Status:</td>
<td>Success</td>
<td>Submitted By:</td>
<td>POSBUD1</td>
</tr>
<tr>
<td>Server:</td>
<td>PSUNIX</td>
<td>Recurrence:</td>
<td></td>
</tr>
</tbody>
</table>

Position Audit Report

<table>
<thead>
<tr>
<th>Name</th>
<th>Size</th>
<th>CreationDate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message Log</td>
<td>1204 bytes</td>
<td>2004-10-12 17:11:13</td>
</tr>
<tr>
<td>Trace File</td>
<td>981 bytes</td>
<td>2004-10-12 17:11:13</td>
</tr>
<tr>
<td>umper034_107410.PDI</td>
<td>3123 bytes</td>
<td>2004-10-12 17:11:13</td>
</tr>
</tbody>
</table>
The Output
The Audit Report

- Differences between position data and job data such as union code, salary grade, salary step, regular-temporary, position class/jobcode.
- Compares state/existence of position to job
- Assures Position and budget existence
- Flags External Transfer Positions with balances
- Run daily
Audit Report
FTE and Headcount Report

- Report will be available from the University of Maine System>HRMS>Reports 2 navigation

- Will provide FTE, Headcount, vacancy, incumbent names for regular information for incumbents by department by business unit.

- Will provide FTE, Headcount, vacancy for part-time, temporary and student positions by department and business unit.
Organizational Charts

- Require Reports-to field to be filled in
- Can be done in summary or detail
- Will be HUGE if done for entire campus
Post Go-Live Tasks

HR Responsibilities

- Create/Assign positions to employees with no position for current job row.
- Split shared positions
- Review position titles
- Review future Job row position values.
- Enter Position on Additional Pay
- Fix mismatched salary plans and grades
- Enter missing Reports-To on Position
- Create vacant positions
Post Go-Live Tasks

Budget Responsibilities

- Reconcile converted position budgets with FAST
- Enter budgets for positions with no incumbent/annual salary/and current distribution (students, overtime, etc.)
- Build budgets for vacant positions if applicable.
Thanks for Coming!