


POSITION CONTROL

Sondra Evans (Ramona)
Ana Machado (Ramona)

10/12/17

PeopleSoft User's Conference 2017

1



Session Topics

- Welcome & Introductions (5 min)
- Position Control, Best Practices, Communication, Queries (20 min)
 - Sondra Evans & Ana Machado (Ramona)
- Discussion (20 min)
 - How do you handle Position Control in PeopleSoft?
 - What are your best practices?
 - Which queries do you use?
 - How do you communicate across units (Fiscal, HR, Payroll) about the DBT?
- Wrap up & Closing (5 min)

10/12/17

PeopleSoft User's Conference 2017

2

What is Position Control in PeopleSoft?

- Knowing your FTE count
- Knowing your positions
- Knowing which queries to use and how to analyze the data

Knowing your FTE count

- **FTE**
 - Who is responsible for this data in HR? Who is responsible for this data in Fiscal?
 - How do these departments share this information and track changes?
- **Auditing Staffing vs. Budget**
 - What staff in HR and Fiscal are involved with your audit
 - How many times during the year does your district complete the audit?
- **Reminder:** Positions are updated on Add/Update Position Screen and DBT Screen

What is Position Control in PeopleSoft?

- Knowing your FTE count
- Knowing your positions
- Knowing which queries to use and how to analyze the data

Knowing your Positions

What are some important fields that are related to a position?

<ul style="list-style-type: none"> ▪ Effective Date ▪ Department ▪ Location ▪ Reports To ▪ Job Code ▪ Union Code 	<ul style="list-style-type: none"> ▪ Full/Part Time ▪ Standard Hours ▪ Budgeted Position (Yes or No) ▪ Classified Indicator (Certificated or Classified) ▪ C-Days
IS THIS POSITION ACTIVE?	IS THIS POSITION ENCUMBERED?
WHAT SALARY DOES IT ENCUMBER AT?	WHO IS THE INCUMBENT ASSIGNED TO THIS POSITION?
DID MY CHANGE TO THE POSITION UPDATE JOB DATA? <i>Check Effective Date!</i>	DID YOU REMEMBER TO UPDATE ACCRUAL HOURS FACTOR IN JOB DATA?

Examples/Best Practices – Communication is Key

Who is involved in making these changes and how are you communicating between departments?

- **Adjust FTE for current position** (employee has decrease/increase in hours)
 - See Bid Hours - Checklist (Helpful Checklist for Transportation)
- **Add New Position** (growth position in district)
- **Position does not have the correct location**
 - Location and Reports To
- **Position does not have the correct department**
 - DBT NEEDS CHANGED
- **Inactivating DBT/Inactivating Positions**
 - DBT must be inactivated BEFORE Position is inactivated

10/12/17

PeopleSoft User's Conference 2017

5

What is Position Control in PeopleSoft?

- Knowing your FTE count
- Knowing your positions
- Knowing which queries to use and how to analyze the data

Knowing which queries to use and how to analyze the data

- **Helpful to Human Resources/Payroll**
 - M_HR_SAL_GRADE_STEP_BY_EMPL (Salary Plan, Grade, and Step - Employee Name)
 - M_HR_VACANT_POSITIONS (Vacant Positions)
 - M_HR_EMPLOYMNT_DATES (FTE and Positions)
- **Helpful to Fiscal/Budget**
 - FAR_POSTIONS_VACANT
 - M_DBT_OLD_ACTIVE_DEPTS
 - M_KK_POSNS_NO_DBT_2017

10/12/17

PeopleSoft User's Conference 2017

6

DISCUSSION (20 MIN)

How do you handle Position Control in PeopleSoft?
What are your best practices?
Which queries do you use?
How do you communicate across units (Fiscal, HR, Payroll) about the DBT?

SESSION NOTES

These slides and session notes are published on the CRC Website.
<http://crc.sdcoe.net/peoplesoftconference>