

PeopleSoft Training Activity Sheet

HR2: POSITION MANAGEMENT

For use in training. Last updated November 3, 2016.

Activity 1: Find Existing Positions

Directions: Find these four positions in the training database at District 63. Answer the questions for each.

Position	Questions		
10630201	Title?	Reports To? Position # and title?	FT/PT? 10/11/12 Months?
10639999	Title?	Salary Admin Plan code and description?	What are the Standard Hours?
10639001	Title?	FTE?	# of contract days?
10632890	Title?	Incumbent Name?	CHALLENGE: Date/time of last update? Updated by who?

Have extra time? (1) How many positions have the word "tech" in their description? _____

(2) How many positions report to Position #10633081? _____

Activity 2: Add a Classified Position

Directions: Create a new classified position from scratch.

Description	Specific Information	Budget & Incumbents	CDAYS Track (Certificated Positions only)
<input type="checkbox"/> Effective Date: 07/01/2016 <input type="checkbox"/> Reason: NEW <input type="checkbox"/> Job Code: Administrative Clerk (23068) <input type="checkbox"/> Reg/Temp: Temp <input type="checkbox"/> Full/Part Time: Hourly <input type="checkbox"/> Union Code <input type="checkbox"/> Department: 020 <input type="checkbox"/> Location: 063720 <input type="checkbox"/> Reports To: 10633042 <input type="checkbox"/> Salary Plan Information: Classified Substitute, Grade 001 <input type="checkbox"/> Standard Hours: 1	<input type="checkbox"/> Max Head Count <input type="checkbox"/> CBEDS classified positions (not retirees). <input checked="" type="checkbox"/> Budgeted Position <i>Expand the Education and Government triangle to enter/view these fields:</i> <input type="checkbox"/> Pre-Encumbrance Indicator: no encumbrance <input checked="" type="checkbox"/> Encumber Salary Option <input checked="" type="checkbox"/> Classified Indicator <i>Verify Classified or Certificated (if incorrect, Job Code is wrong)</i> <input type="checkbox"/> FTE: 0 <input type="checkbox"/> Adds to FTE Actual Count (NO Checkbox)	<i>This is a view-only screen.</i> <input checked="" type="checkbox"/> Current budget costs <input checked="" type="checkbox"/> Current Incumbents (once filled)	<input type="checkbox"/> CDAYS Track <i>Certificated Positions only</i> <input type="checkbox"/> SAVE

Write down the Position #: _____

Activity 3: Add a Certificated Position

Directions: Create a new certificated position from scratch.

Description	Specific Information	Budget & Incumbents	CDAYS Track (Certificated Positions only)
<input type="checkbox"/> Effective Date: 07/01/2016 <input type="checkbox"/> Reason: NEW <input type="checkbox"/> Job Code: Teacher (11300) <input type="checkbox"/> Reg/Temp: Permanent <input type="checkbox"/> Full/Part Time: Full-Time 10 months <input type="checkbox"/> Union Code T33 <input type="checkbox"/> Department: 020 <input type="checkbox"/> Location: 063020 <input type="checkbox"/> Reports To: 10633042 <input type="checkbox"/> Salary Plan Information: Certificated 182 Days, Grade 005 <input type="checkbox"/> Standard Hours: 37.5	<input type="checkbox"/> Max Head Count <input type="checkbox"/> CBEDS classified positions (not retirees). <input checked="" type="checkbox"/> Budgeted Position Expand the Education and Government triangle to enter/view these fields: <input type="checkbox"/> Pre-Encumbrance Indicator <input checked="" type="checkbox"/> Encumber Salary Option <input checked="" type="checkbox"/> Classified Indicator <i>Verify Classified or Certificated (if incorrect, Job Code is wrong)</i> <input type="checkbox"/> FTE 1.0 <input type="checkbox"/> Adds to FTE Actual Count (Checkbox)	<i>This is a view-only screen.</i> <input checked="" type="checkbox"/> Current budget costs <input checked="" type="checkbox"/> Current Incumbents (once filled)	<input type="checkbox"/> CDAYS Track (if Certificated Employee): A Teacher, 184.0

Write down the Position #: _____

Activity 4: Copy Positions

Directions: Copy the classified and certificated positions that you created in Activities 2 and 3. Look how fast it is!

Classified

- Effective Date: 07/15/2016
- Classified Indicator: Classified
- FTE: 1.0

Position # _____

Certificated

- Effective Date: 07/15/2016
- Classified Indicator: Certificated
- FTE: 1.0

Position # _____

Activity 5: Update Headcount

Directions: Update the headcount for the classified position you created in Activity 2.

- Effective Date: 07/02/2016
- Headcount: 10