Quick Reference Guide

Position Management for Department Position Managers

A quick guide for creating/modifying positions and establishing funding sources

HR Data Management Contacts

Please refer to the Data Management staff directory, http://cfo.asu.edu/fs-dm-staff, for the Data Management Specialist responsible for your department.
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General Overview
The purpose of this Reference Guide is to provide a quick reminder of the procedural steps used by Departmental Position Managers to:

- View Position Cross-Reference
- Maintain Position Accounting
- Create/Modify Positions
- Manage Returned/Withdrawn Position & Worklist

This guide assumes that you already have your necessary access to the system and that you are at least somewhat familiar with Position Management. If not, please see the Position Management Business Process Guide.

Access the System
1. Access Position Management via MyASU (my.asu.edu)
2. In the Quick Links column on the left, click on HR|CS
3. Sign in automatically with the “Sign in as” link or go to the “PeopleSoft sign in page” and enter your User ID (ASURITE) and Password
4. Using the Menu column on the left-hand side navigate to:
   ASU Customization > ASU HCM Custom > ASU Position Management
5. Click on the “Add to Favorites” link in the top right-hand corner and save link for quick access.

From this menu you can see the 3 sections that Position Management is comprised of.

Click on the link below for quick reference to the procedure listed:

1. Position Cross Reference to verify position data
2. Maintain Position Accounting to manage accounting information
3. Modify a Position to edit existing position data
4. Create a Position by cloning an existing position
5. Create a Position from scratch
6. Manage a Returned Position and resubmit for approval
7. Withdraw a Position to permanently remove prior changes
Verify a Position Using Position Cross-Reference

1. Sign on to HR PeopleSoft. Navigate to:
   ASU Customization > ASU HCM Custom > ASU Position Management > Position Cross-Reference

2. Search for the desired position number.


4. Click on the Position Data Details link for all attributes most recently processed.

5. Click on the Return button.

6. Click on the Fiscal Year Distribution link for accounting information by fiscal year.

7. Click on the Return button.

8. Click on the Distribution History link for entire history of accounting information.

9. Click on the Return button.

10. Review the Submitted ‘Front-End’ Staging Data for information that has not yet processed.

11. Review the Current Incumbent List.

12. Review the Process Monitor at the bottom of the page to see the workflow (if applicable).

13. Click on the Recruiting Data tab and review information (to be) sent to Kenexa (if applicable).

14. Click on the Position Cross-Ref-Acctg tab for actual fiscal year-to-date accounting on position.

15. Return to another tab by clicking on it.
Maintain Position Accounting

The role that you will need to access position accounting is Dept Financial Mgr.

1. Sign on to HR PeopleSoft. Navigate to:
   ASU Customizations > ASU HCM Custom > ASU Position Management > Maintain Position Accounting

2. Type in the position number or search with the magnifying glass.

3. Click on the Continue button.

4. Enter an effective date you want the accounting changes to take hold. (Must be current or future payroll).

5. Click on the Continue button.

6. Type in the correct Account or search with the magnifying glass.

7. Enter the Distribution %.

8. If applicable, click on the “+” sign to add an account(s). Total distribution must equal 100%.

9. If applicable, type in the Earnings Code optional distribution or search with the magnifying glass.

10. Type in the correct Account or search with the magnifying glass.

11. Enter the Distribution %.

12. If applicable, click on the “+” sign to add an account(s). Total distribution must equal 100%.

13. Click Save and Submit.
Modify a Position

To modify a position you must have the role HCM Department Position Mgr.

1. Sign on to HR PeopleSoft. Navigate to:
   
   **ASU Customizations > ASU HCM Custom > ASU Position Management > Create/Modify Position**

2. Click on the **Modify Existing Position** radio button.

3. Type in the **Position Number** or search with the magnifying glass.

4. Click on the **Continue** button.

5. Click on the **Drop-down** button and select the appropriate **Empl Class**.

6. Type in the **Job Code** or search with the magnifying glass.

7. Enter the **Effective Date** you want the position changes to take hold.

8. Change the **standard hours**, if needed, and tab out.

9. Fill out the **FTE Change Reason**, if applicable.

10. Ensure the **Worker’s Comp Code** matches the position attributes.

11. Review/change whom the position **Reports-To**.

12. Click on the **Drop-down** button and select the **Full/Part Time** status.

13. Click on the **Drop-down** button and select the **Reg/Temp** status.

14. Click on the magnifying glass to select a new **Location**, if needed.

15. For student workers, click on the magnifying glass to select the **SWS Split Code**.

16. If modifying to create a new job posting see [Create Position from Scratch](#) for recruiting steps.

17. Click on the **Save and Submit** button.

18. Click on the **Return** button.

19. If applicable, click on the **Create Distribution Funding** link to edit the accounting and see the **Maintain Position Accounting** section for more information.
Create a Position by Cloning an Existing Position

To create a position you must have the role HCM Department Position Mgr

1. Sign on to HR PeopleSoft. Navigate to:

ASU Customizations > ASU HCM Custom > ASU Position Management > Create/Modify Position

2. Click on the Create New Position radio button.
3. Click on the Clone from Existing Position radio button.
4. Click on the Return button.
5. Type in the Position Number or search with the magnifying glass.
6. Click on the Continue button.
7. Review the copied attributes and update as necessary.
8. If cloning to create a new job posting see Create Position from Scratch for recruiting steps.
9. Once finished, click on the Save and Submit button or Save for Later.
10. Write down the new position number.
11. Click on the Return button.
12. Click on the Create Distribution Funding link to add the funding distribution. See the Maintain Position Accounting section for more information.
Create a New Position from Scratch

To create a position you must have the role **HCM Department Position Mgr**

1. Sign on to [HR PeopleSoft](https://hr.northwestern.edu). Navigate to:
   
   **ASU Customizations > ASU HCM Custom > ASU Position Management > Create/Modify Position**

2. Click on the **Create New Position** radio button.

3. Click on the **Create from Scratch** radio button.

4. Click on the **Return** button.

5. Click on the **Drop-down** menu and select the appropriate **Empl Class**.

6. Type in the **Job Code** or search with the magnifying glass.

7. Enter the **Effective Date** or use the Calendar icon to select. (Unless waiver, must be within the current pay period).

8. Click on the **Continue** button.

9. Change the **standard hours**, if needed, and tab out.

10. For position begin integrated to Kenexa the **Max Head Count** and **Budgeted FTE** can be ignored.

11. Ensure the **Worker’s Comp Code** matches the position attributes.

12. Type in the **Department** code or search with the magnifying glass.

13. Type in the **Reports-To** position number or search with the magnifying glass.

14. Click on the **Drop-down** button and select the **Full/Part Time** status.

15. Click on the **Drop-down** button and select the **Reg/Temp** status.

16. Click on the magnifying glass to select the **Location Code**.

17. For student workers, click on the magnifying glass to select the **SWS Split Code**.

18. If the position will be posted in Kenexa, scroll back to the top and click on the **Ready for Recruitment** button.

19. Click on the **Recruitment Data** tab.

20. Click on the magnifying glass and select the **Reason for Hire**.

21. Update the number of **Positions to be Filled** amount.

22. Enter the **Full-Time Approved/Approved Hourly Max** amount.

23. Click on the button(s) of the appropriate **Source of Funds**.
24. Enter a **Position Justification**.

25. Click on the **Drop-down** menu and select the **Scope of Search**.

26. If necessary, enter the **start date** and **end date**.

27. If Waiver, enter a **Waiver Emplid** OR click on the **External Staff Hire** button and type **Name**.

28. If Waiver, fill out purpose of waiver, description of scope, and minimum requirements fields.

29. If applicable, add **Fingerprint** or **Background Check** requirements or **Advertise** the position as necessary.

30. If any of the above options selected, add the **Chargeback Acct**.

31. Take note of the **Job Code** and **Department Code** for use in Kenexa.

32. Click on the **Save and go to PM Accounting** button or **Save for Later**.

33. If applicable, review benefits eligible message. Click on the **Return** button.

34. Write down the new **position number**.

35. Click on the **Return** button.

36. Submit successful. Click on the **Return** button.

37. HCM Dept Financial Manager must enter **Position Accounting Distribution** data.

38. In the Required row, enter the **Account** code and **Distribution %**.

39. If applicable, click the “+” button to add an account to the funding.

40. In the Optional row, enter an **Earnings Code** or search with the magnifying glass.

41. Enter the **Account** code and **Distribution %**.

42. If applicable, click the “+” button to add an account to the funding.

43. Click on the **Save & Start Workflow** button.

44. Click on the **OK** button.

45. Click on the **Return** button.

The position has now been sent to the appropriate areas for workflow approval.
Returned Position Numbers

When a position number is returned to the user, the user will get an email stating that the “Position number has been returned at your request.” Here is the process to determine why a position number has been returned:

1. Sign on to HR PeopleSoft. For more information on the returned position navigate to:
   
   **ASU Customizations > ASU HCM Custom > ASU Position Management > Position Cross-Reference**

2. Enter the returned Position Number and click the **Search** button.

3. Scroll to the bottom of the page to view the **Process Monitor** and its approval information.
   The approver who returned the position is indicated in the box marked “Denied.”

4. To view their comments click on the **Drop-down** button or click on **View/Hide Comments**.

5. Review the comments for a reason why the position was returned to you.

6. Navigate to Create/Modify Position:
   
   **ASU Customizations > ASU HCM Custom > ASU Position Management > Create/Modify Position**

7. Click on the **Return to Work-In-Progress** radio button

8. Click on the **Position number link** of the Returned position(s)

9. **Edit** the position as necessary based on the returner’s comments.

10. Click on **Save and go to PM Accounting** at the bottom of the page.

11. Click the **Return** button.

12. **Edit** the accounting information as necessary and ensure the distribution equals 100%.
   If no changes to accounting are needed, then simply leave the account information as is.

13. Click the **Save & Start Workflow** button.
**Withdrawing a Position Number**

This action can only be taken by the creator of a position. In order to withdraw a position change request, the position number needs to be in either a “**Not Submitted**” or “**Returned**” status.

1. Sign on to **HR PeopleSoft**, Navigate to:

   **ASU Customizations > ASU HCM Custom > ASU Position Management > Create/Modify Positions**

2. Click on the **Return to Work-in-Progress** radio button.

3. Click on the **position number link** that you want to withdraw.

4. Click on the **Withdraw** button at the bottom of the screen.

5. Click on the **Continue Withdrawal** to process the withdrawal.

The status will change to withdrawn and will no longer be in the user’s Work in Progress. If the position number is a new position number, once it is withdrawn it no longer exists.