



POSITION CONTROL
TRAINING MANUAL

City Of Memphis
Human Resources

ORACLE®

Create a new position

The following instructions will replace the **Change Authorization Form – Section VI Adjustment to Complement** when deleting and adding a position. Additional information needed to complete the process and not on the **Change Authorization Form** is obtainable for the Position Control Report.

VI. Inactive Employee	*Complete only items that 2 positions were added to the request					
Responsible Manager	Effective Date	Position Title	Location	Emp. Type	Emp. Grade	Emp. Class
VI. Adjustment To Complement	Delete Position	Employee Name	Job Position	Employee Name	Job Position	Job Title
	Organization	Fund	Position	Organization	Fund	Position
• Increase to Total Complement?	Grade	Budgeted Annual Salary		Grade	Budgeted Annual Salary	Increase/Decrease
Maximum Excess Approval	None	\$1000		None	\$1000	

MUST STATE REASON FOR CHANGE IN COMMENTS SECTION

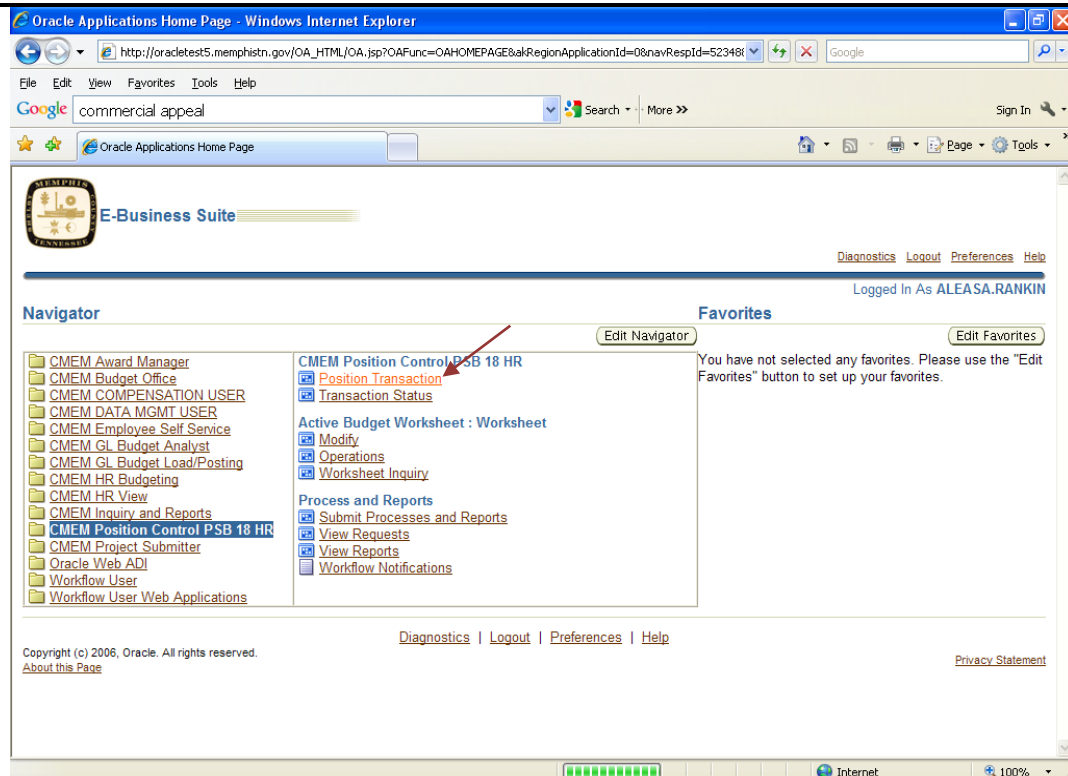
Before a request to create a new position is executed, the CMEM Position Control PSB XXX user will have to determine whether or not there is an active PSB worksheet. The following options, depending on a worksheet, are:

1. CMEM Position Control PSB XXX (an **inactive** PSB worksheet)
2. Active Budget Worksheet :Worksheet: Worksheet (an **active** PSB worksheet)

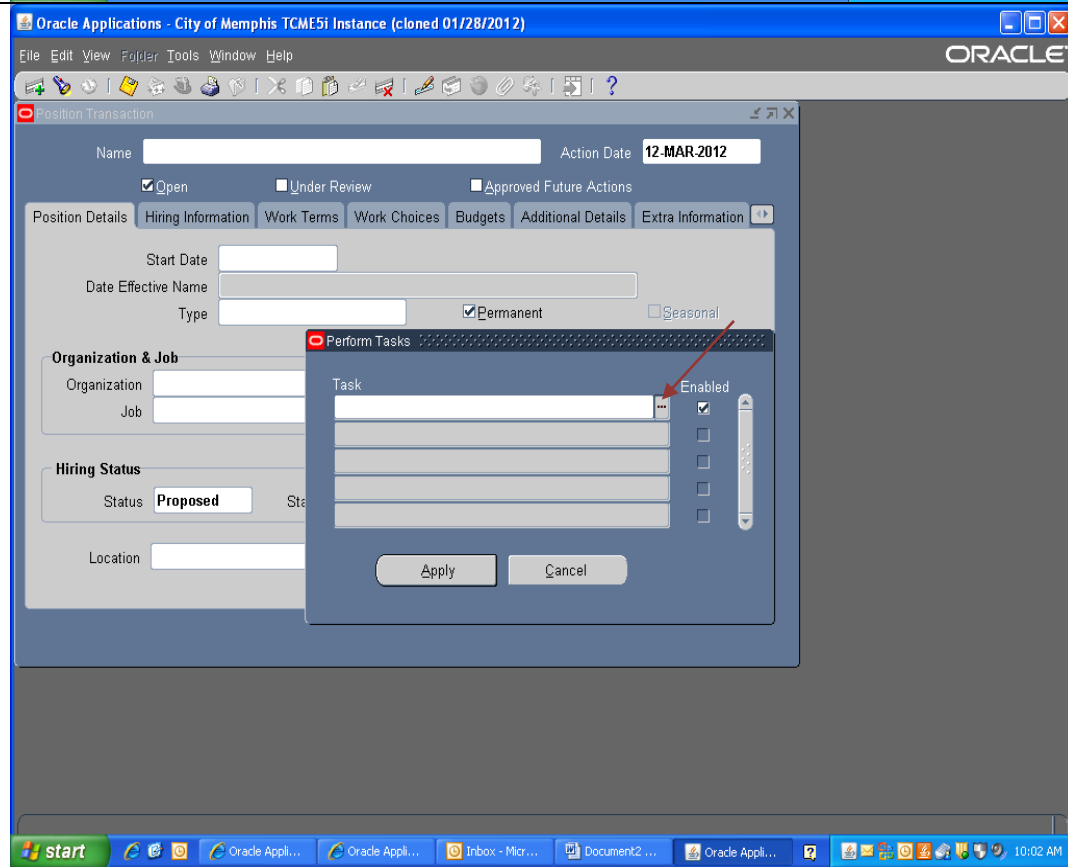
Responsibility & Navigation	Form	Comments
<p>CMEM Position Control PSB XXX....</p>	<p>The screenshot shows the Oracle E-Business Suite Navigator. In the left pane, 'CMEM Position Control PSB 18 HR' is selected. In the right pane, 'Active Budget Worksheet : Worksheet 2' is selected under the 'Process and Reports' section. Other items in the right pane include 'Position Transaction', 'Transaction Status', 'Modify', 'Operations', 'Worksheet Inquiry', 'Submit Processes and Reports', 'View Requests', 'View Reports', and 'Workflow Notifications'.</p>	

For an **inactive** Worksheet

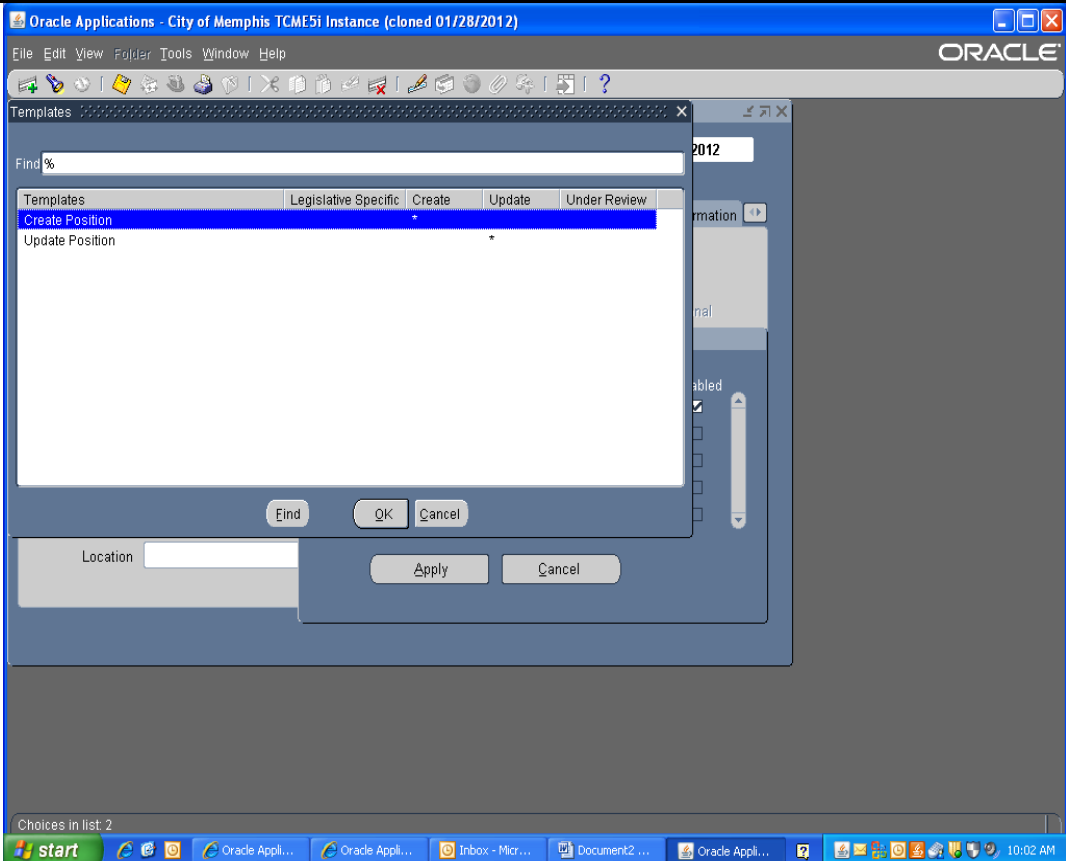
CMEM Position Control PSB XX>Position Transaction



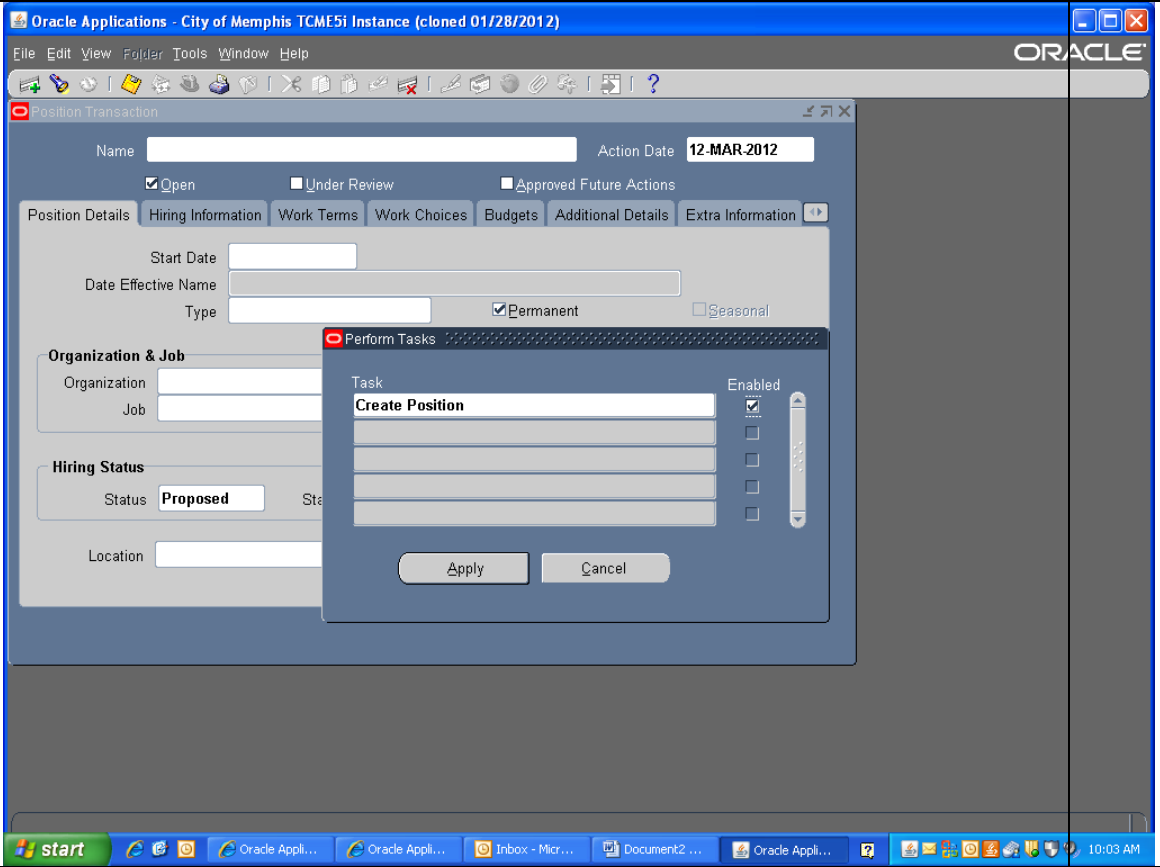
Click in LOV (List of Values...) to choose the task template



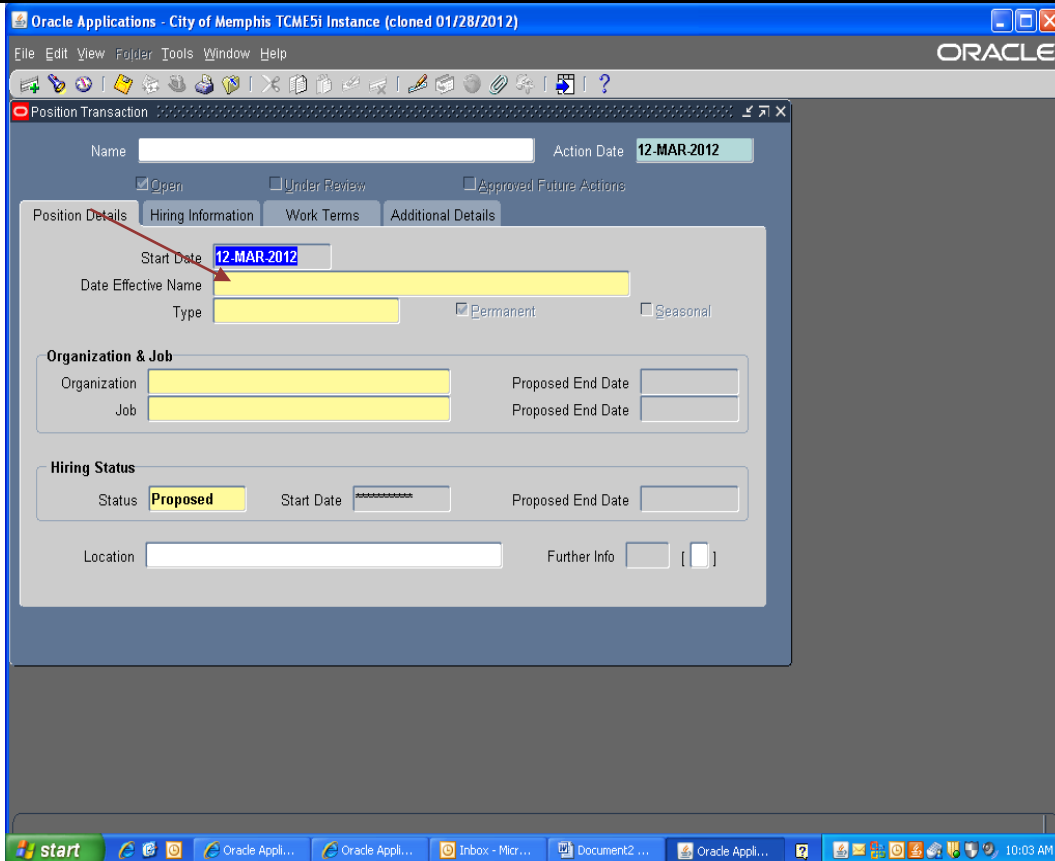
Select "Create Position" and click Ok button



Click Apply button



Click in the Date Effective Name field to enter the name of the new position

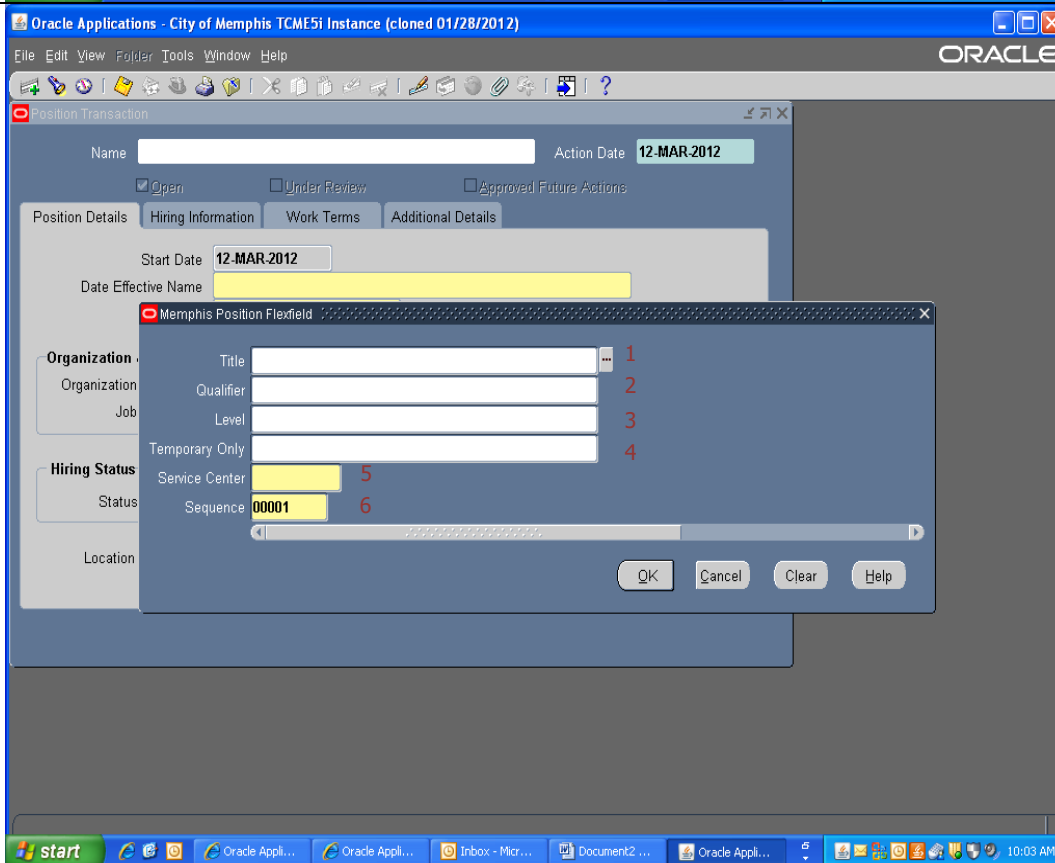


The Action Date will default to system date (Change the date here to reflect the effective date - This date should be the budget year for Example: FY12 Budget year is 01-Jul-2011)

Click in the LOV ... to select the Title (1), Qualifier (2), Level (3), and (Service Center 5). Oracle will automatically populate Sequence (6).

Click Ok after each.

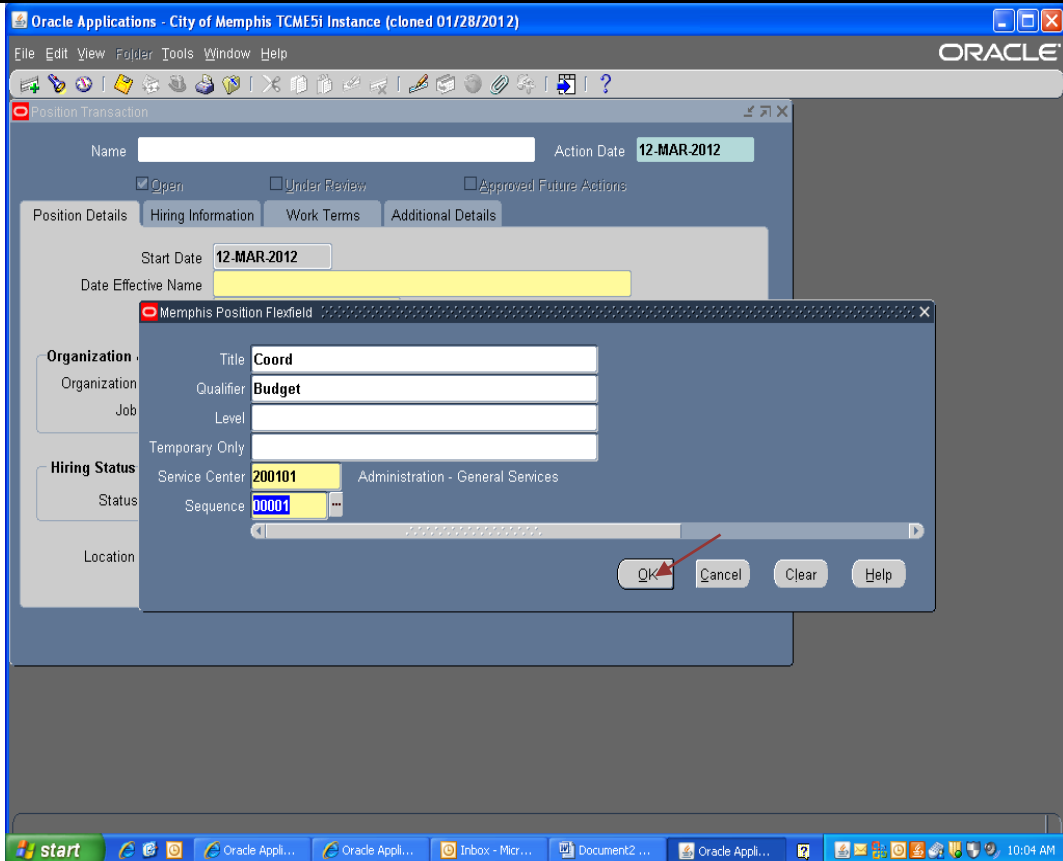
The source information can be retrieved from the Position Control Report or Compensation will provide a Job Review? Evaluation Memo that will have all of the necessary position attributes



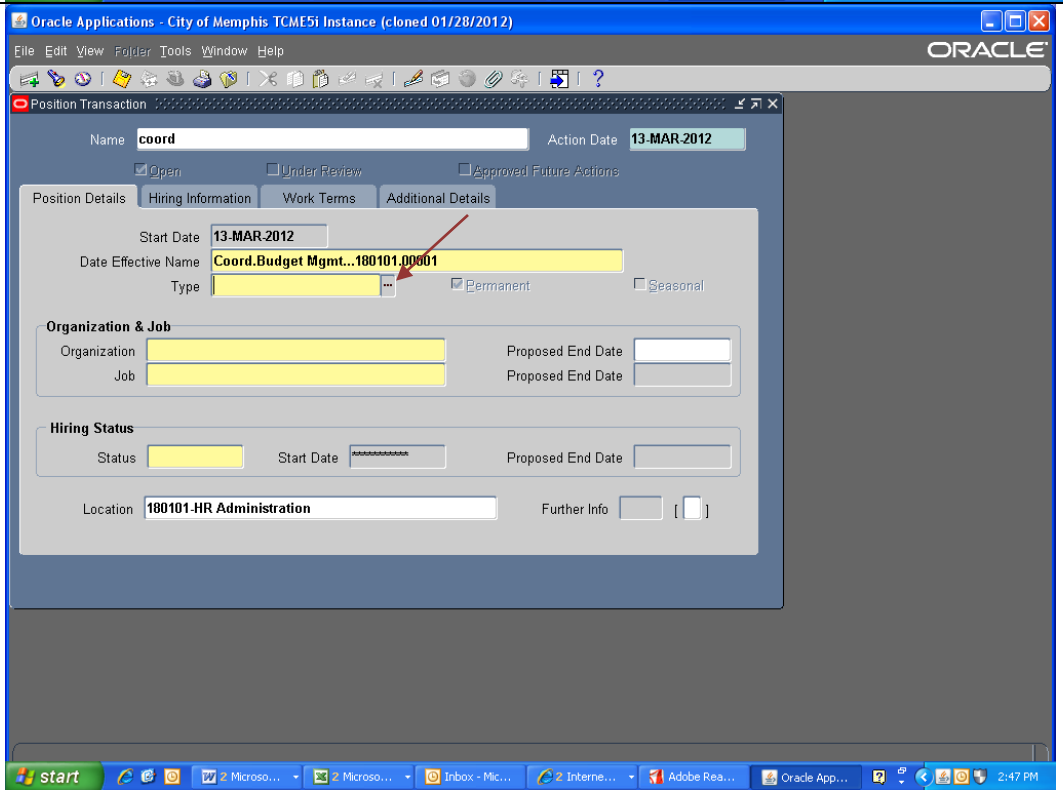
Temporary Only (4) is only used for Temporary positions

Please note: Compensation will process all Contingent Positions)

Click OK button



Select Position Type LOV...



Select LOV... for:

(1) Type (will always be **"Single Incumbent"**)

(2) Organization (**should match the org number in the position title**)

(3) Job (located in Memo from Compensation or the Position Control Report)

(4) Status (will always be **"PROPOSED"** until the approval process is complete)

(5) Start Date (defaults)

(6) Location (will default to org; if different key Location here)

Click on the DEF [] field

Oracle Applications - City of Memphis TCME5i Instance (cloned 01/28/2012)

Position Transaction

Name: Coord.Budget...180101.00001 Action Date: 12-MAR-2012

Start Date: 12-MAR-2012

Date Effective Name: Coord.Budget...180101.00001

Type: Single Incumbent 1

Organization & Job

Organization: 180101- Human Resources Admin 2

Job: Professional 3

Hiring Status

Status: Proposed 4

Location: 180101-HR Administration 6

Single Incumbent, meaning that only one employee is allowed to hold the position at any time

Shared, meaning there can be several incumbents, up to the value of the FTE field

Pooled (Public Sector only), meaning the position is loosely defined so rules about FTE and hours are not enforced by the system

None, which you can select if you do not need to record position types

Select LOV... for:

(1) Pension-FICA
(2) Position Class
(3) Position Number (same as JCC number)
(4) Head Count (leave blank, the number occupying position)

(5) Source Position (**VERY IMPORTANT** if deleting a position; this field alerts the approvers of the position being deleted!!!!)

Click OK.

Please Note: (If this is a new position please forward to Compensation the documentation from City Council approving this position)

Oracle Applications - City of Memphis TCME5i Instance (cloned 01/28/2012)

Position Transaction

Name: Coord.Budget...180101.00001 Action Date: 12-MAR-2012

Type: Single Incumbent

Organization & Job

Hiring Status

Status: Proposed

Location: 180101-HR Administration

Additional Position Details

Pension - FICA

Position Class

Position Number

Head Count

Source Position

OK Cancel Clear Help

FICA – normally used for Temps and Part-time employees

General – used for full-time employees that are not uniformed officers

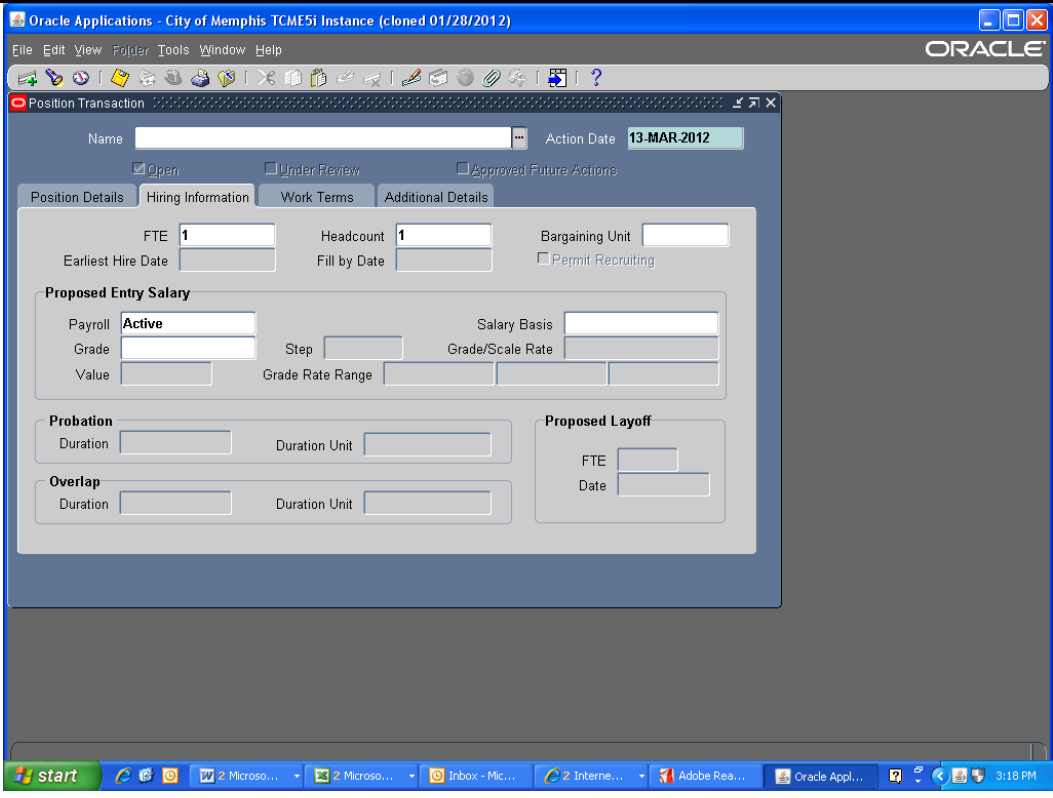
Uniform – used for full-time uniformed officers

Click on the Hiring Information tab if not already navigated to the next tab after Position Details

Enter the Hiring Information for FTE – **Should always equal 1. (Unless parttime should be 0)**

Headcount defaults to 1 for a Position Type of Single Incumbent

- (1) Bargaining Unit ("9999" unless a union employee)
- (2) Salary Basis (Bi-weekly)
- (3) Grade (found on Memo or Position Control Report)

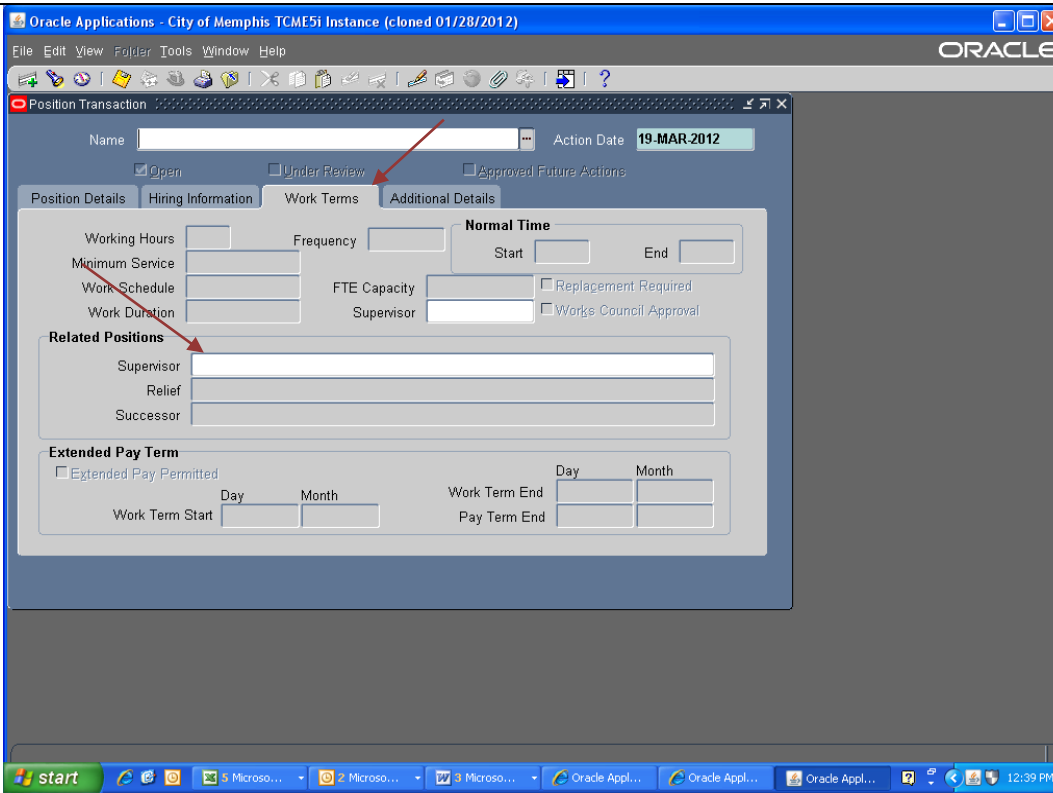


Please note: Please tab through the Step and Grade/Scale Rate

Click Work Terms tab.

Here Supervisor information is entered.

Note: Please place the Supervisor of this position title in this field.



Click Additional Details.

Under the comments section, please indicate whether the position was created thru PSB (active worksheet) or not.

The screenshot shows the 'Additional Details' tab of a Position Transaction in Oracle Applications. The 'Name' field is empty, and the 'Action Date' is 19-MAR-2012. The 'Comments' section has a text area with a red arrow pointing to it. Below it are sections for 'Posting Description', 'Security Requirements', and 'Amendment Information' with fields for Date, Reference Number, and Recommendation.

Please Note: Comments can be keyed here or in the comment box during the approval process. Leaving comments preserves comments after position has been approved and activated.

Click Save

To Route request.

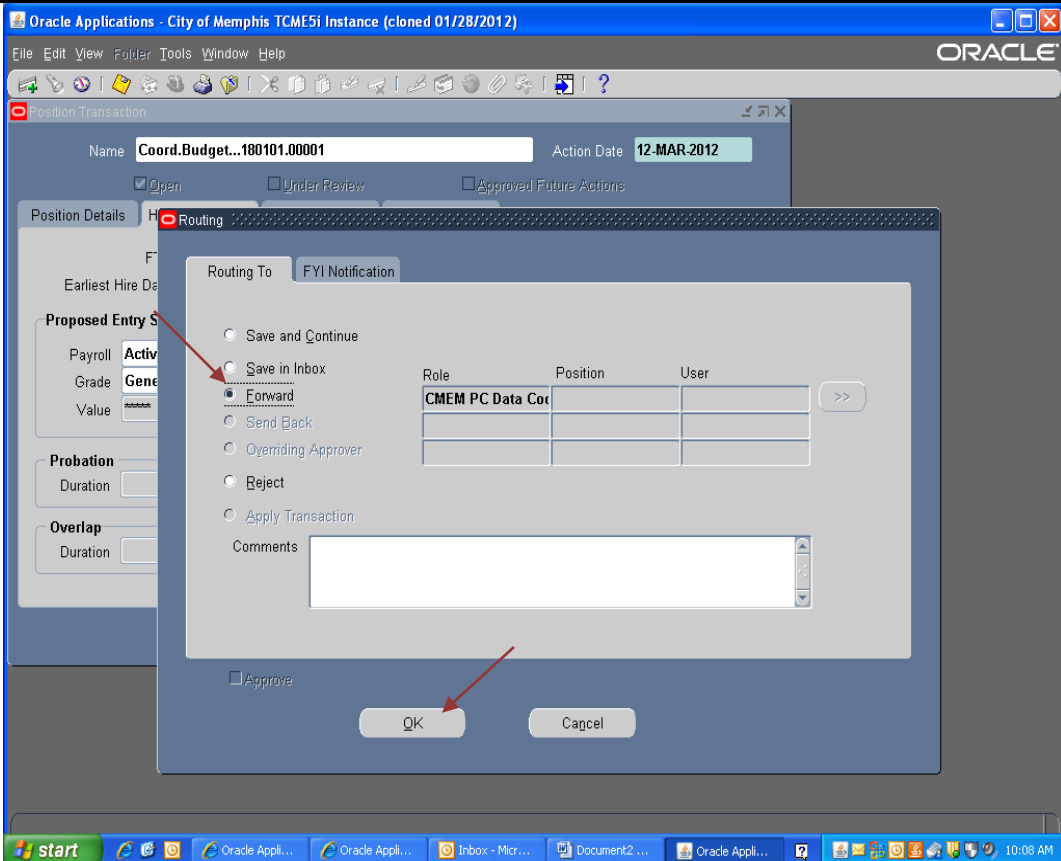
The screenshot shows the 'Hiring Information' tab of a Position Transaction. The 'Name' field contains 'Coord.Budget...180101.00001' and the 'Action Date' is 12-MAR-2012. The 'FTE' is 1, 'Headcount' is 1, and 'Bargaining Unit' is 9999 - Non-re. The 'Proposed Entry Salary' section shows 'Payroll' as Active, 'Salary Basis' as Biweekly, and 'Grade' as General.15. The 'Grade Rate Range' is 24.12 to 38.95. There are also fields for 'Probation' and 'Proposed Layoff'.

The Routing form will appear

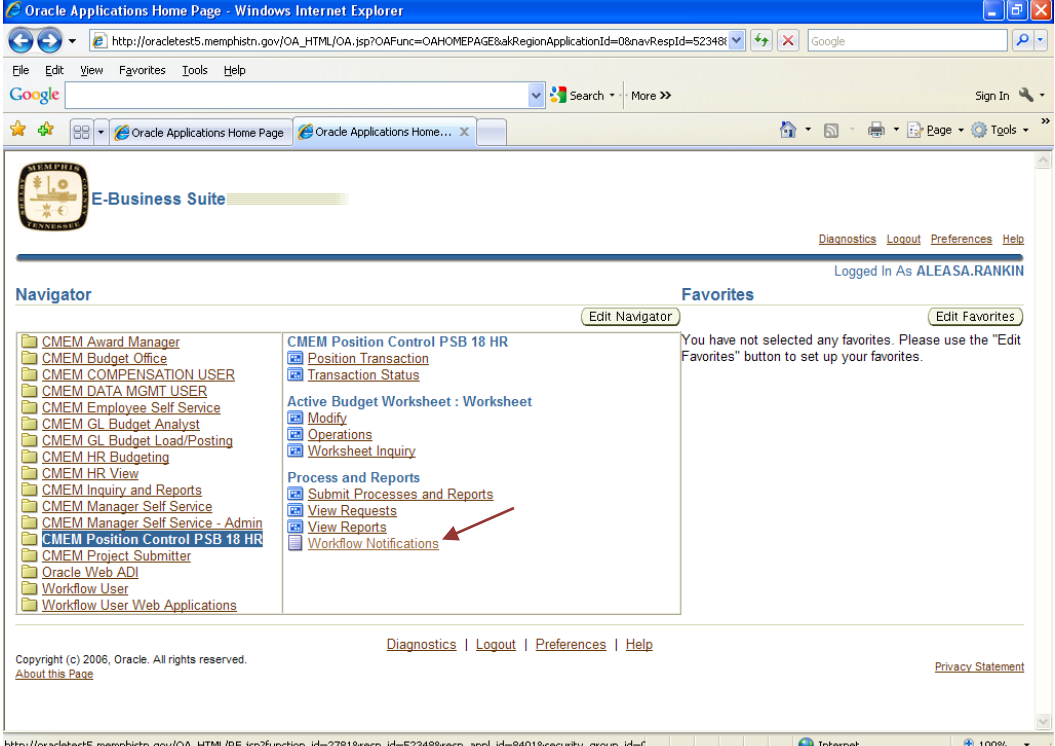
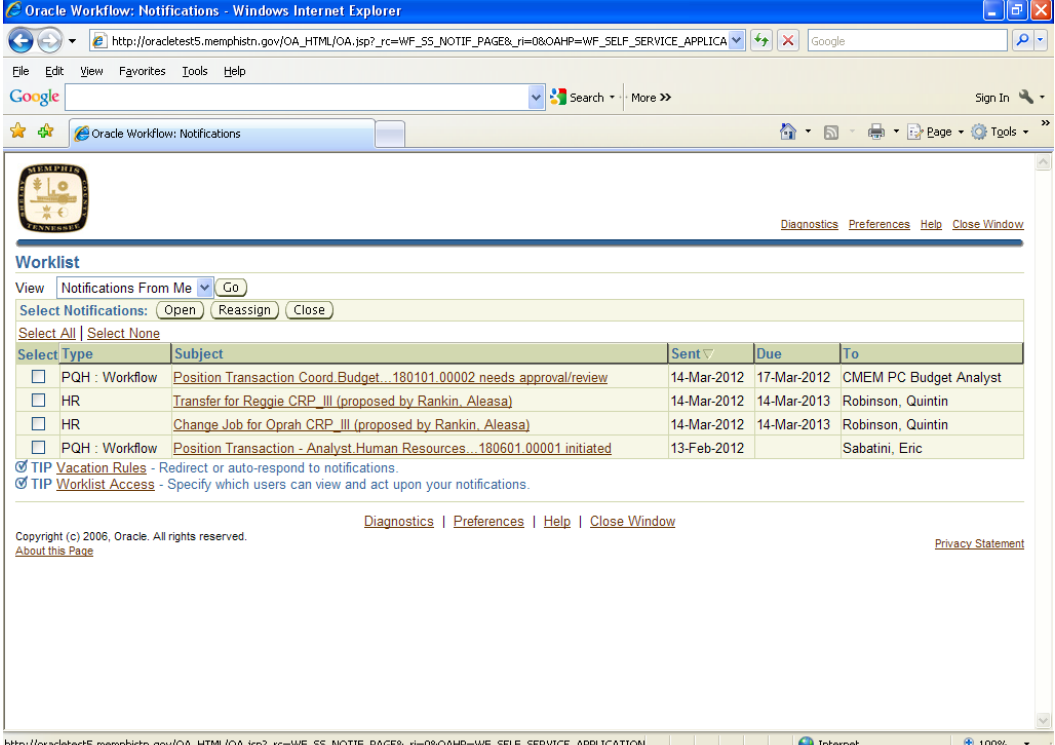
Click Forward (the next role in the approval process will automatically populate)

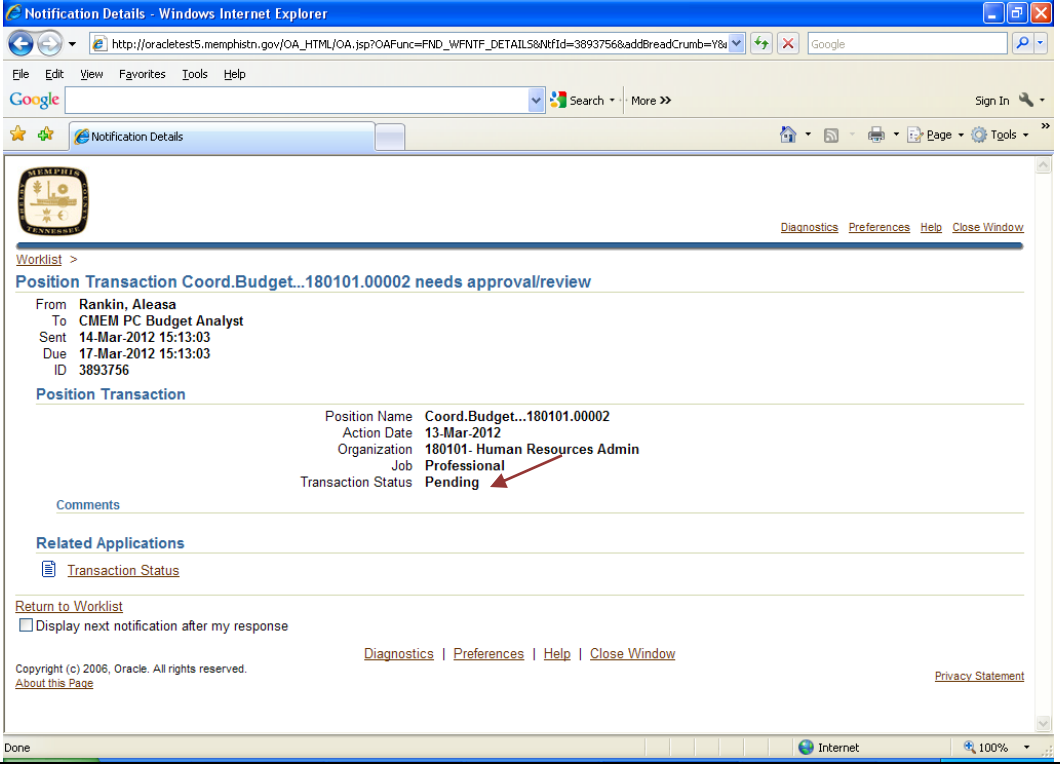
Include Comments, if needed

Click OK



The position transaction is routed for approval. At this point, any approver along the approval hierarchy can return it for correction. All notifications can be viewed in Workflow notifications:

Responsibility & Navigation	Form	Comments																														
<p>CMEM Position Control PSB XX...> Process and Reports> Workflow Notifications (Will open in a separate Internet Window)</p>	 <p>The screenshot shows the Oracle E-Business Suite Navigator. The 'CMEM Position Control PSB 18 HR' folder is selected, and a red arrow points to the 'Workflow Notifications' link within the 'Process and Reports' section.</p>																															
<p>Click or Select Subject to open the notification</p>	 <p>The screenshot shows the Oracle Workflow: Notifications page. It displays a table of notifications with the following data:</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Type</th> <th>Subject</th> <th>Sent</th> <th>Due</th> <th>To</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>PQH : Workflow</td> <td>Position Transaction Coord.Budget...180101.00002 needs approval/review</td> <td>14-Mar-2012</td> <td>17-Mar-2012</td> <td>CMEM PC Budget Analyst</td> </tr> <tr> <td><input type="checkbox"/></td> <td>HR</td> <td>Transfer for Reggie CRP_III (proposed by Rankin, Aleasa)</td> <td>14-Mar-2012</td> <td>14-Mar-2013</td> <td>Robinson, Quintin</td> </tr> <tr> <td><input type="checkbox"/></td> <td>HR</td> <td>Change Job for Oprah CRP_III (proposed by Rankin, Aleasa)</td> <td>14-Mar-2012</td> <td>14-Mar-2013</td> <td>Robinson, Quintin</td> </tr> <tr> <td><input type="checkbox"/></td> <td>PQH : Workflow</td> <td>Position Transaction - Analyst Human Resources...180601.00001 initiated</td> <td>13-Feb-2012</td> <td></td> <td>Sabatini, Eric</td> </tr> </tbody> </table>	Select	Type	Subject	Sent	Due	To	<input type="checkbox"/>	PQH : Workflow	Position Transaction Coord.Budget...180101.00002 needs approval/review	14-Mar-2012	17-Mar-2012	CMEM PC Budget Analyst	<input type="checkbox"/>	HR	Transfer for Reggie CRP_III (proposed by Rankin, Aleasa)	14-Mar-2012	14-Mar-2013	Robinson, Quintin	<input type="checkbox"/>	HR	Change Job for Oprah CRP_III (proposed by Rankin, Aleasa)	14-Mar-2012	14-Mar-2013	Robinson, Quintin	<input type="checkbox"/>	PQH : Workflow	Position Transaction - Analyst Human Resources...180601.00001 initiated	13-Feb-2012		Sabatini, Eric	
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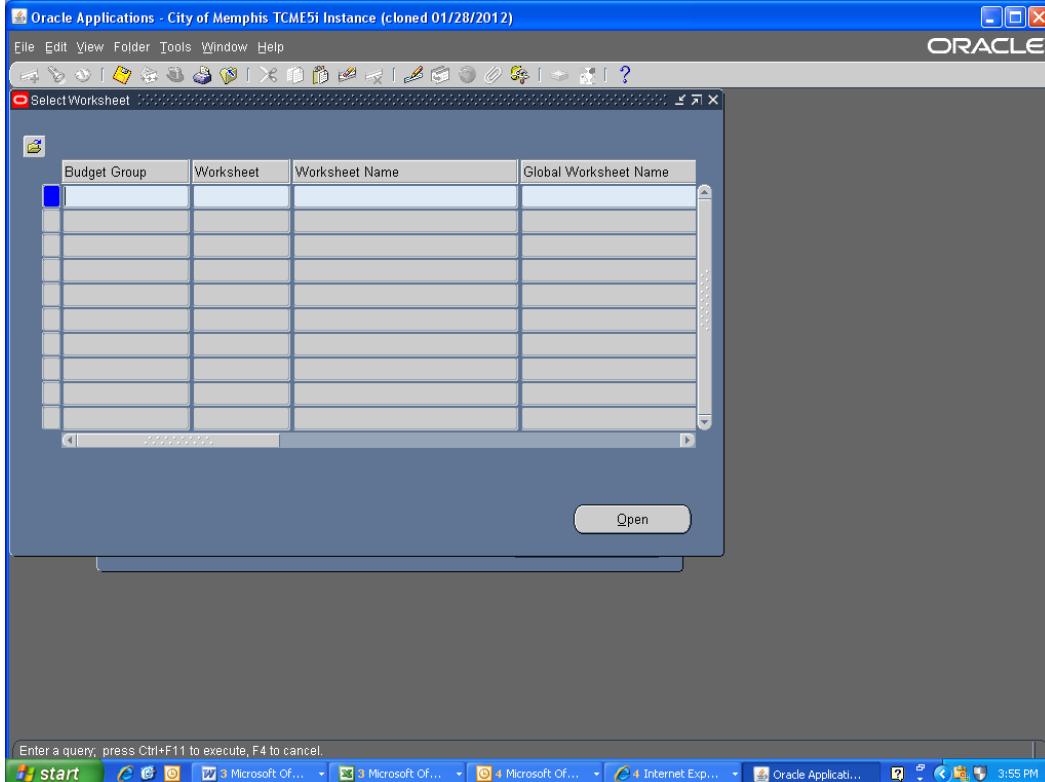
Responsibility & Navigation	Form	Comments
<p>If transaction has not been approved, the Status will remove "Pending" until the transaction has been approved and submitted. At that time the Status is "Submitted"</p>	 <p>The screenshot shows a web browser window titled "Notification Details - Windows Internet Explorer". The address bar shows a URL from memphistn.gov. The page content includes a Memphis logo, a "Worklist" section with a notification titled "Position Transaction Coord.Budget...180101.00002 needs approval/review". The notification details are as follows:</p> <ul style="list-style-type: none"> From: Rankin, Aleasa To: CMEM PC Budget Analyst Sent: 14-Mar-2012 15:13:03 Due: 17-Mar-2012 15:13:03 ID: 3893756 <p>Under the "Position Transaction" section, the following details are listed:</p> <ul style="list-style-type: none"> Position Name: Coord.Budget...180101.00002 Action Date: 13-Mar-2012 Organization: 180101- Human Resources Admin Job: Professional Transaction Status: Pending (indicated by a red arrow) <p>Other elements include "Comments", "Related Applications" (Transaction Status), and a "Return to Worklist" link.</p>	

Responsibility & Navigation

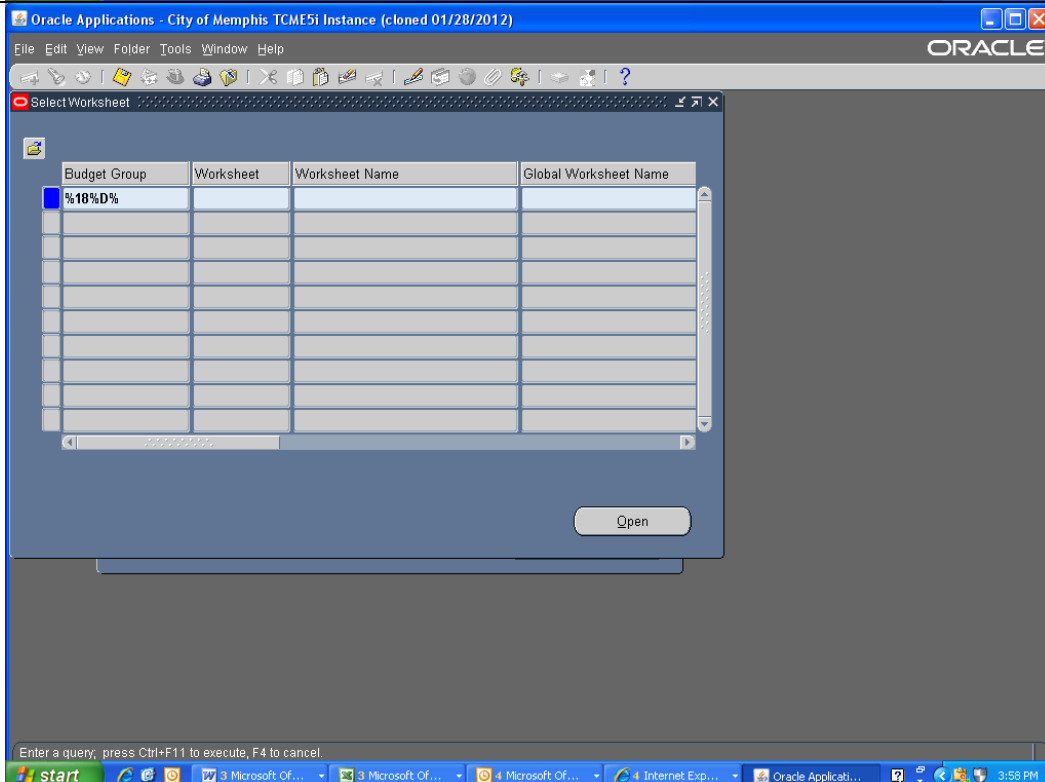
Form

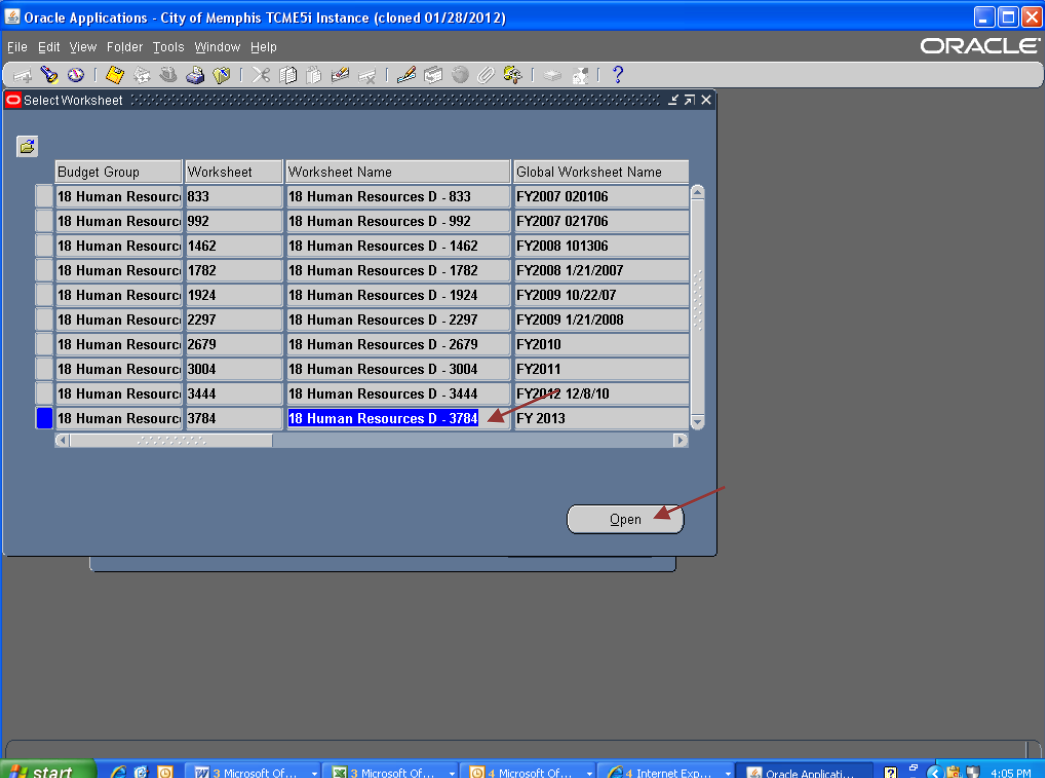
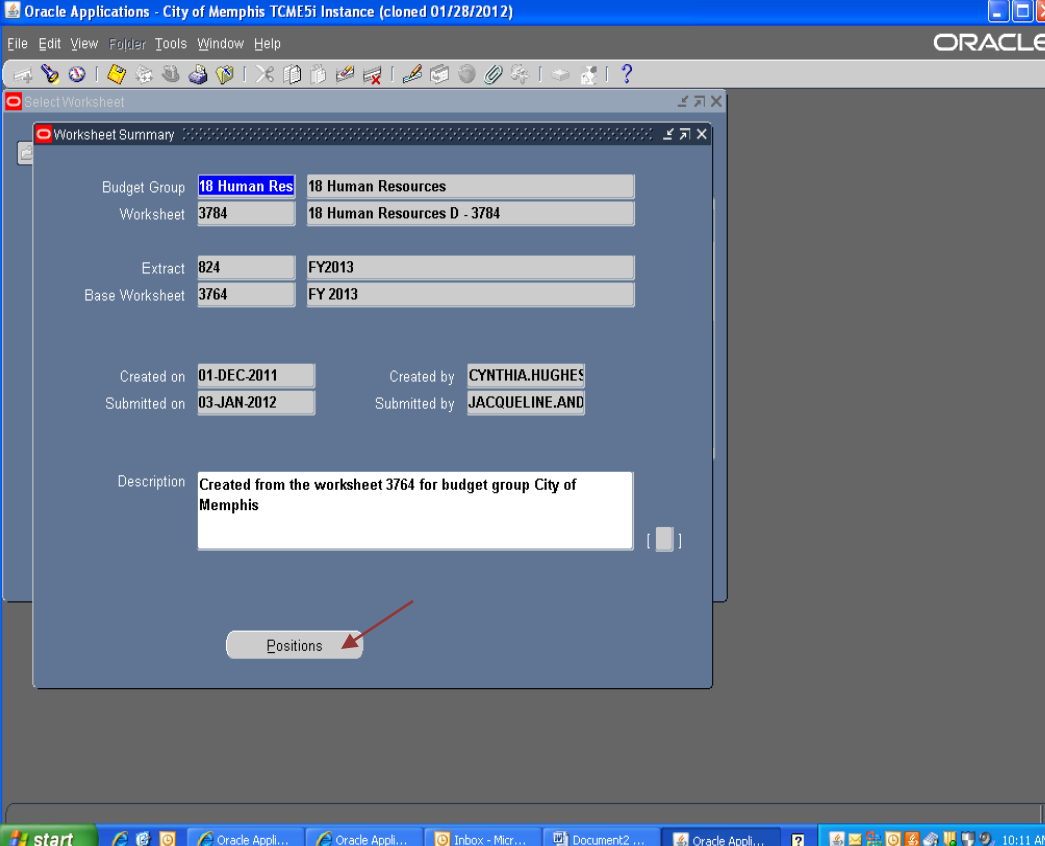
Comments

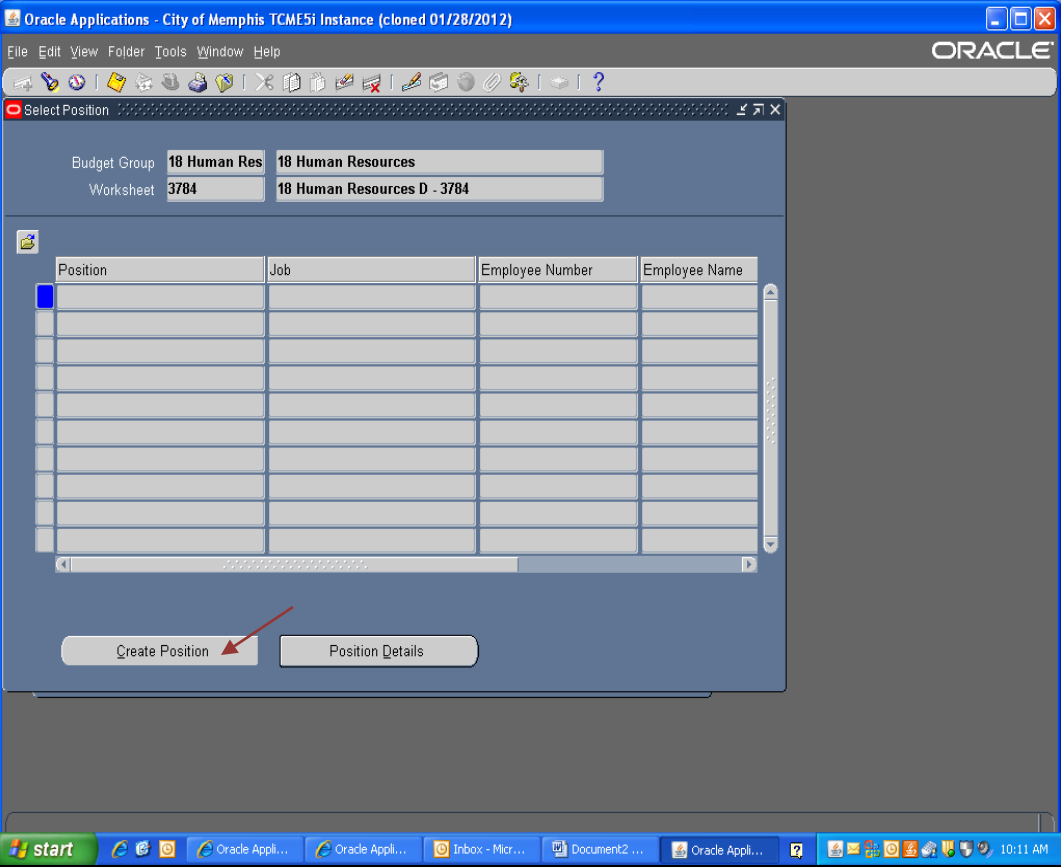
To query for the divisional worksheet:

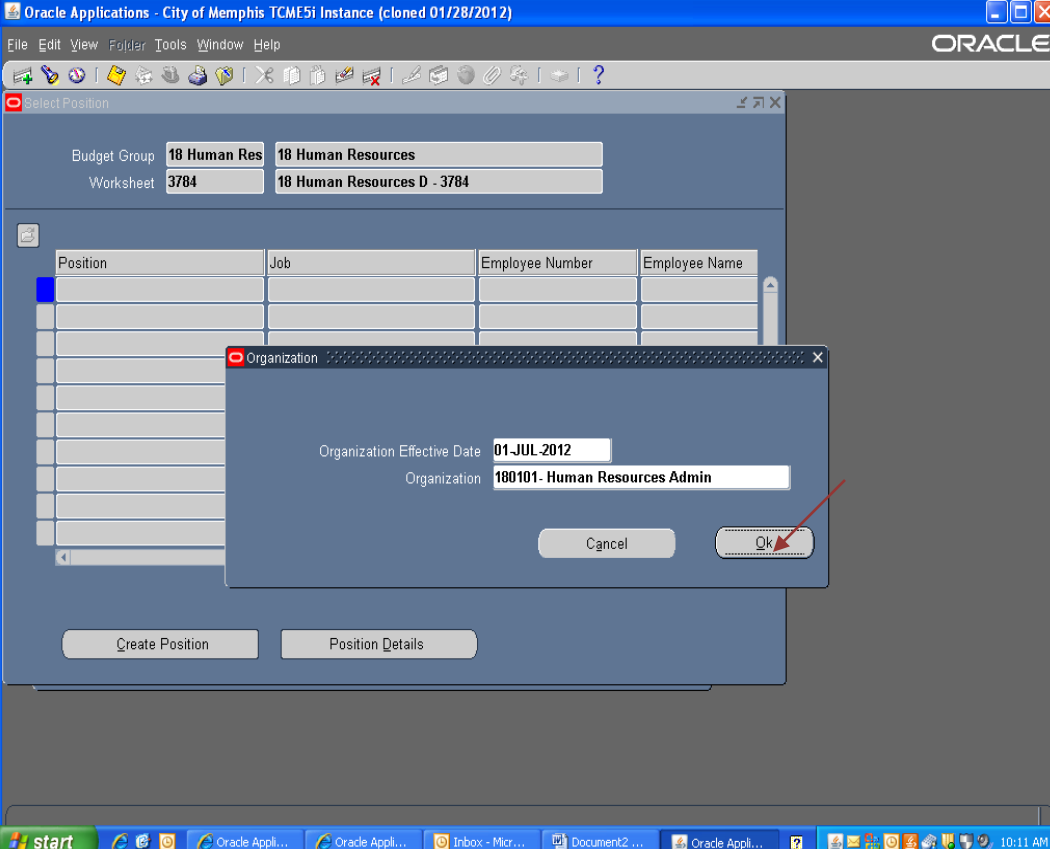
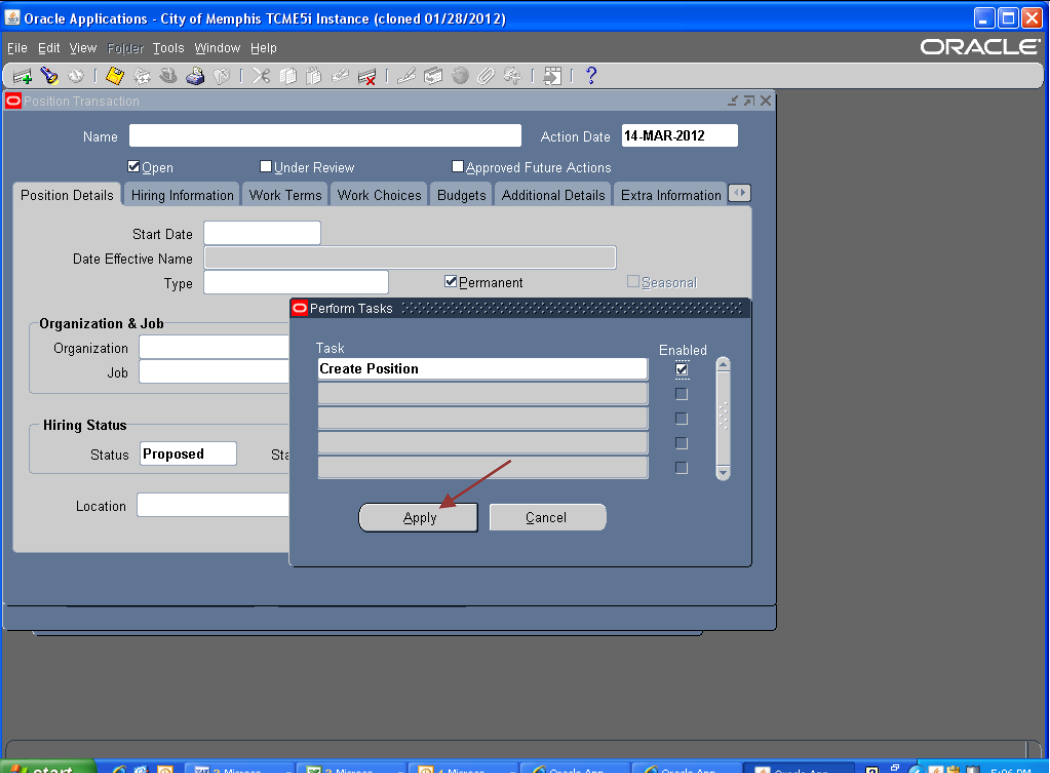


In Budget Group, type %, the division number, %, the letter D and %
Ex.
%18%D%
CTRL F11



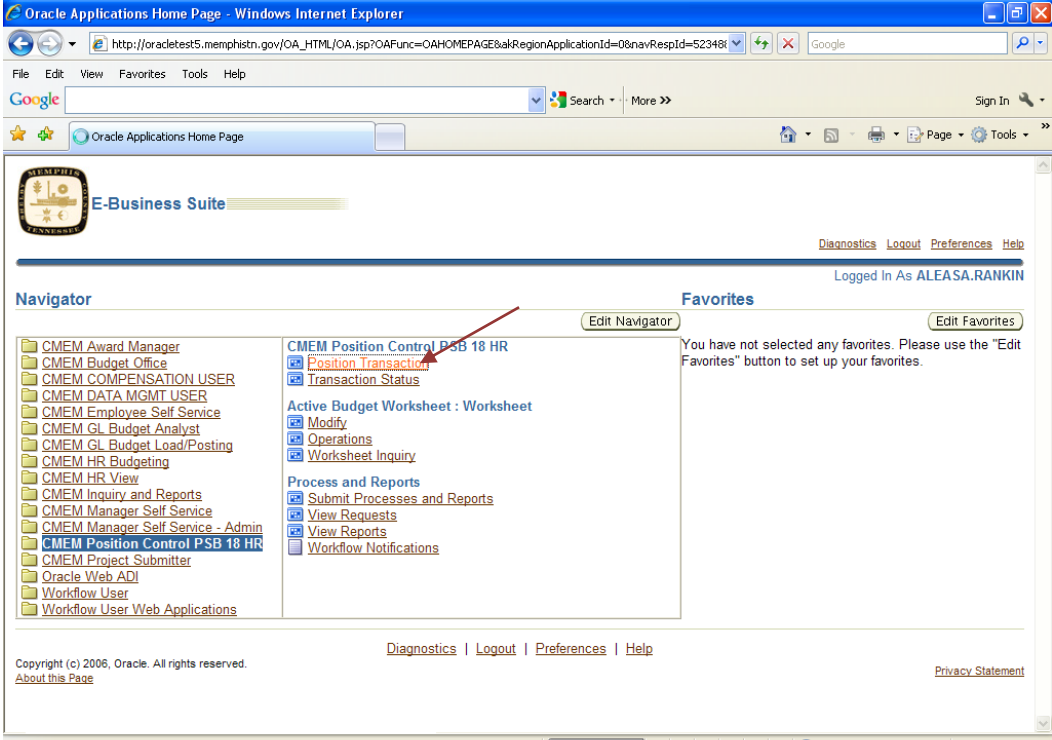
Responsibility & Navigation	Form	Comments																																												
<p>The most current worksheet, is the worksheet with the highest number</p> <p>Click Open</p>	 <table border="1" data-bbox="402 342 1052 632"> <thead> <tr> <th>Budget Group</th> <th>Worksheet</th> <th>Worksheet Name</th> <th>Global Worksheet Name</th> </tr> </thead> <tbody> <tr><td>18 Human Resourc</td><td>833</td><td>18 Human Resources D - 833</td><td>FY2007 020106</td></tr> <tr><td>18 Human Resourc</td><td>992</td><td>18 Human Resources D - 992</td><td>FY2007 021706</td></tr> <tr><td>18 Human Resourc</td><td>1462</td><td>18 Human Resources D - 1462</td><td>FY2008 101306</td></tr> <tr><td>18 Human Resourc</td><td>1782</td><td>18 Human Resources D - 1782</td><td>FY2008 1/21/2007</td></tr> <tr><td>18 Human Resourc</td><td>1924</td><td>18 Human Resources D - 1924</td><td>FY2009 10/22/07</td></tr> <tr><td>18 Human Resourc</td><td>2297</td><td>18 Human Resources D - 2297</td><td>FY2009 1/21/2008</td></tr> <tr><td>18 Human Resourc</td><td>2679</td><td>18 Human Resources D - 2679</td><td>FY2010</td></tr> <tr><td>18 Human Resourc</td><td>3004</td><td>18 Human Resources D - 3004</td><td>FY2011</td></tr> <tr><td>18 Human Resourc</td><td>3444</td><td>18 Human Resources D - 3444</td><td>FY2012 12/8/10</td></tr> <tr><td>18 Human Resourc</td><td>3784</td><td>18 Human Resources D - 3784</td><td>FY 2013</td></tr> </tbody> </table>	Budget Group	Worksheet	Worksheet Name	Global Worksheet Name	18 Human Resourc	833	18 Human Resources D - 833	FY2007 020106	18 Human Resourc	992	18 Human Resources D - 992	FY2007 021706	18 Human Resourc	1462	18 Human Resources D - 1462	FY2008 101306	18 Human Resourc	1782	18 Human Resources D - 1782	FY2008 1/21/2007	18 Human Resourc	1924	18 Human Resources D - 1924	FY2009 10/22/07	18 Human Resourc	2297	18 Human Resources D - 2297	FY2009 1/21/2008	18 Human Resourc	2679	18 Human Resources D - 2679	FY2010	18 Human Resourc	3004	18 Human Resources D - 3004	FY2011	18 Human Resourc	3444	18 Human Resources D - 3444	FY2012 12/8/10	18 Human Resourc	3784	18 Human Resources D - 3784	FY 2013	
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<p>Click Positions</p>	 <p>Budget Group: 18 Human Res 18 Human Resources</p> <p>Worksheet: 3784 18 Human Resources D - 3784</p> <p>Extract: 824 FY2013</p> <p>Base Worksheet: 3764 FY 2013</p> <p>Created on: 01-DEC-2011 Created by: CYNTHIA.HUGHES</p> <p>Submitted on: 03-JAN-2012 Submitted by: JACQUELINE.AND</p> <p>Description: Created from the worksheet 3764 for budget group City of Memphis</p>																																													

Responsibility & Navigation	Form	Comments
<p>All positions in this worksheet can be queried here. But for this exercise, the focus will be creating positions.</p> <p>Click Create Position</p>		

Responsibility & Navigation	Form	Comments
<p>Organization Effective Date will default to the beginning of the next Fiscal Year.</p> <p>Organization is the organization in which the position will be created.</p> <p>Click OK</p>		
<p>From this point on the steps are the same as an inactive worksheet (see page 3)</p> <p>Click Apply</p>		

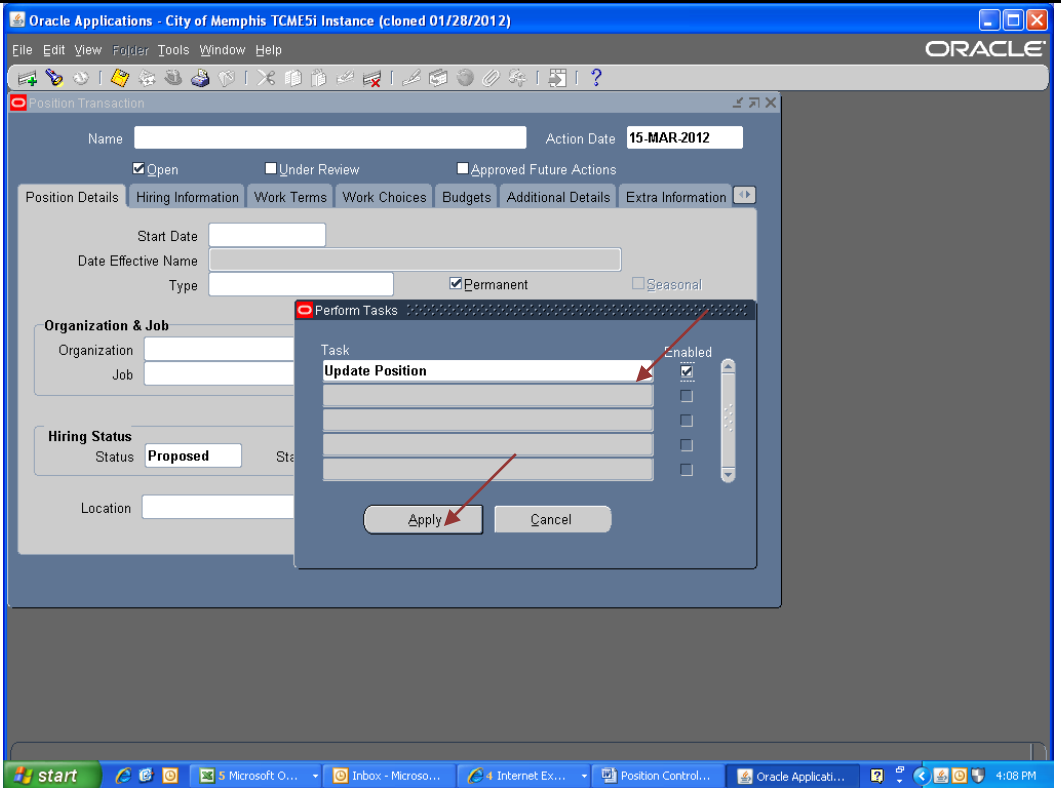
Update a Position

Updating a position can only occur if there is not an active worksheet. If a position update is needed the Change Authorization Form is needed to execute the update.

Responsibility & Navigation	Form	Comments
<p>CMEM Position Control PSB XXX....</p> <p>CMEM Position Control PSB XX XX> Position Transaction</p>		

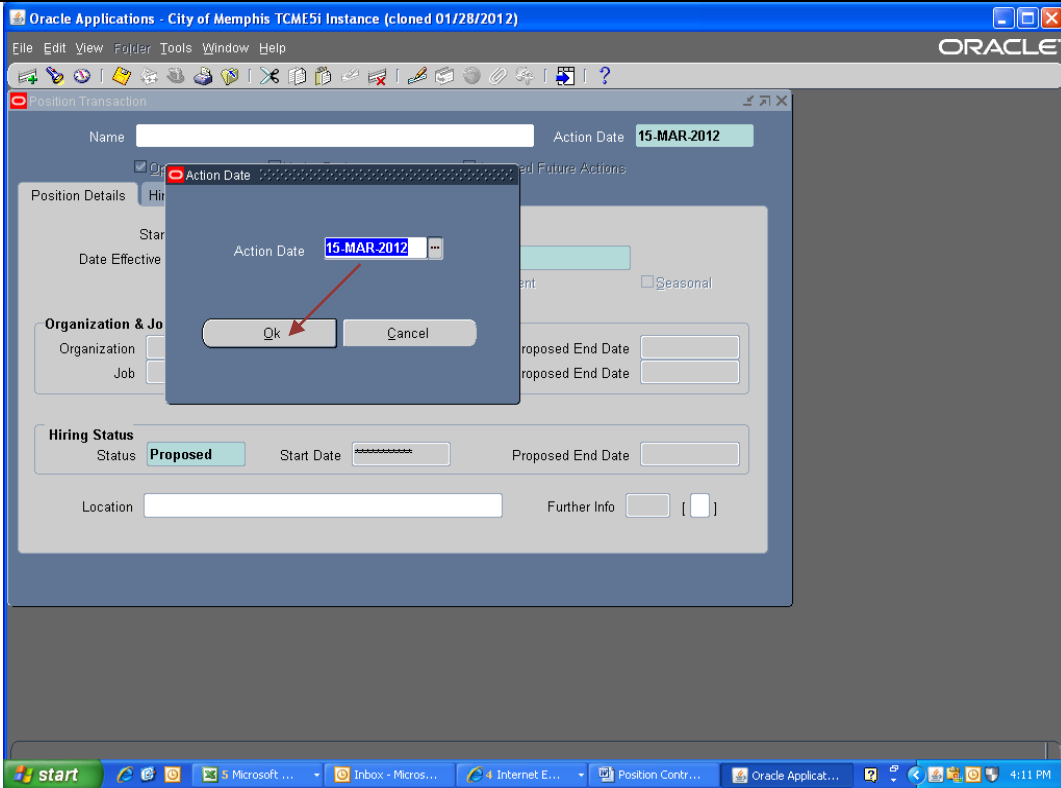
Click LOV...>
Update Position

Click Apply



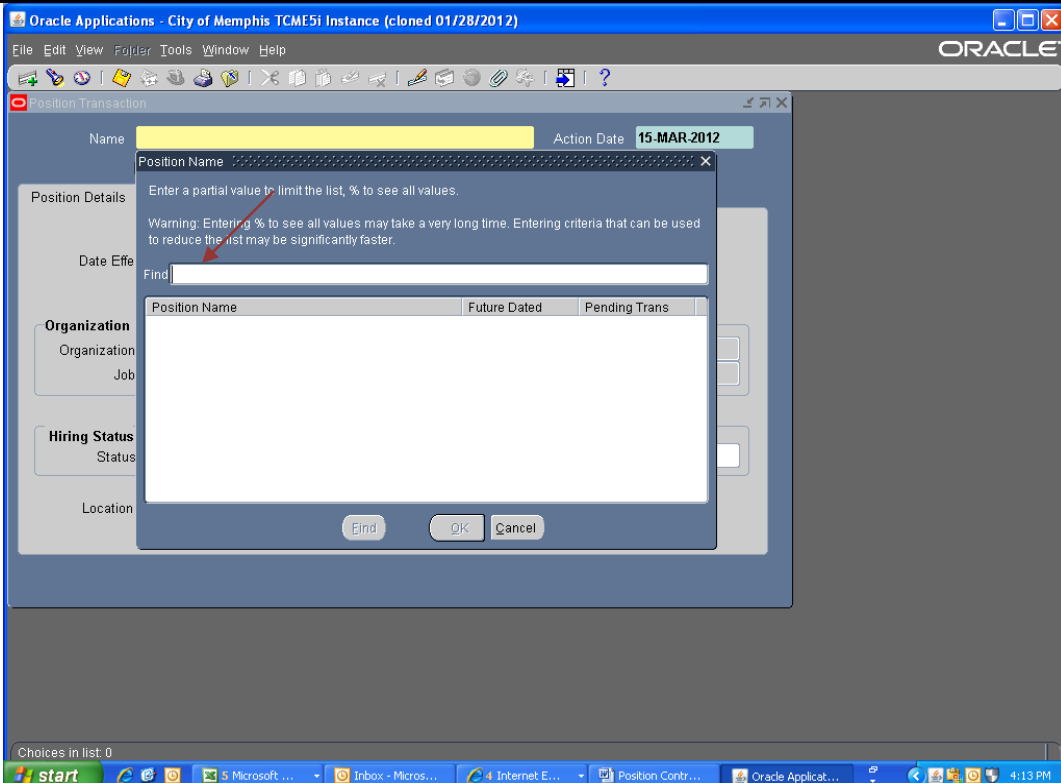
Action Date:
date action is
effective
(defaults to
system current
date)

Click OK



Search for position name

Find: type in position name to be update

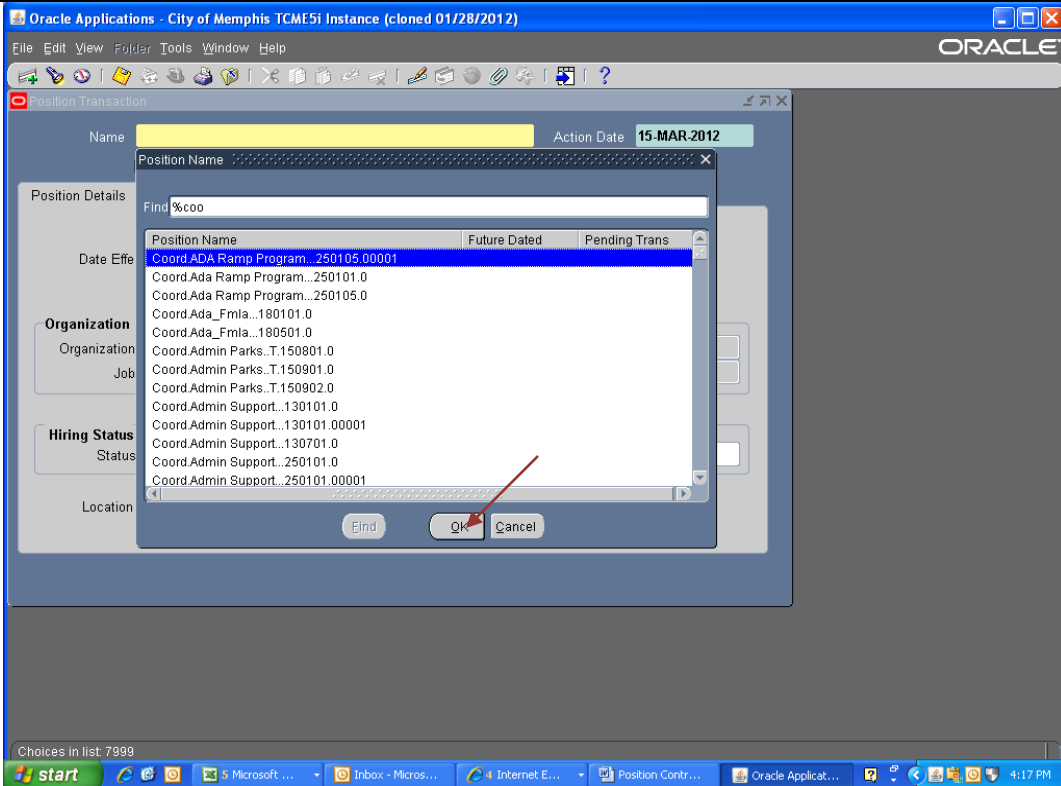


Note: % plus the beginning few letters of the position will bring up a list of possible positions.

% along will bring up every position and will take some time to query

Choose position

Click OK



Note: Please make sure you don't select a position with "T".

Fields that can be updated:

***Status** – Proposed (all changes are proposed until approved)

The following position attributes can't be update:

***Job Title (Date Effective Name)**

***Organization**

***Job**

Oracle Applications - City of Memphis TCME5i Instance (cloned 01/28/2012)

File Edit View Folder Tools Window Help ORACLE

Position Transaction

Name: **Coord.Position Control Data...180401.00001** Action Date: **15-MAR-2012**

Open Under Review Approved Future Actions

Position Details Hiring Information Work Terms Additional Details

Start Date: **01-JUL-2008**

Date Effective Name: **Coord.Position Control Data...180401.00001**

Type: **Single Incumbent** Permanent Seasonal

Organization & Job

Organization: **180401-Compensation/Records Administration** Proposed End Date:

Job: **Professional** Proposed End Date:

Hiring Status

Status: **Active** Start Date: Proposed End Date:

Location: **180401-HR Compensation2** Further Info: [Gt]

start Microsoft... Inbox - Micros... Internet E... Microsoft... Oracle Applicat... 4:27 PM

The following position attributes can be changed:

***Location**

***Bargaining Unit**

***Grade**

***Supervisor Title**

***Position # (JCC Info)**

***Position Class**

Note: Please don't change the comment field only with additional comments with the date comments was added.

After change(s) have been made

Save

Oracle Applications - City of Memphis TCME5i Instance (cloned 01/28/2012)

File Edit View Folder Tools Window Help ORACLE

Position Transaction

Name: **Coord.Position Control Data...180401.00001** Action Date: **15-MAR-2012**

Open Under Review Approved Future Actions

Position Details Hiring Information Work Terms Additional Details

Start Date: **01-JUL-2008**

Date Effective Name: **Coord.Position Control Data...180401.00001**

Type: **Single Incumbent** Permanent Seasonal

Organization & Job

Organization: **180401-Compensation/Records Administration** Proposed End Date:

Job: **Professional** Proposed End Date:

Hiring Status

Status: **Proposed** Start Date: Proposed End Date:

Location: **180401-HR Compensation2** Further Info: [Gt]

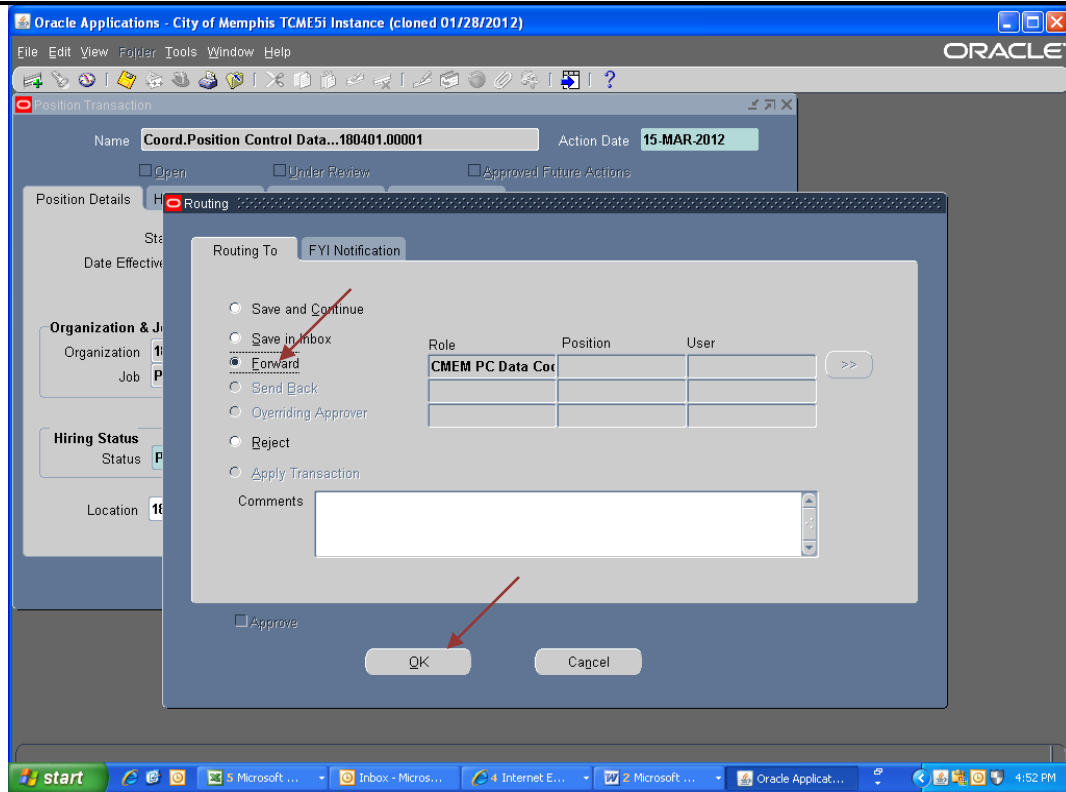
start Microsoft... Inbox - Micros... Internet E... Microsoft... Oracle Applicat... 4:38 PM

Click Forward

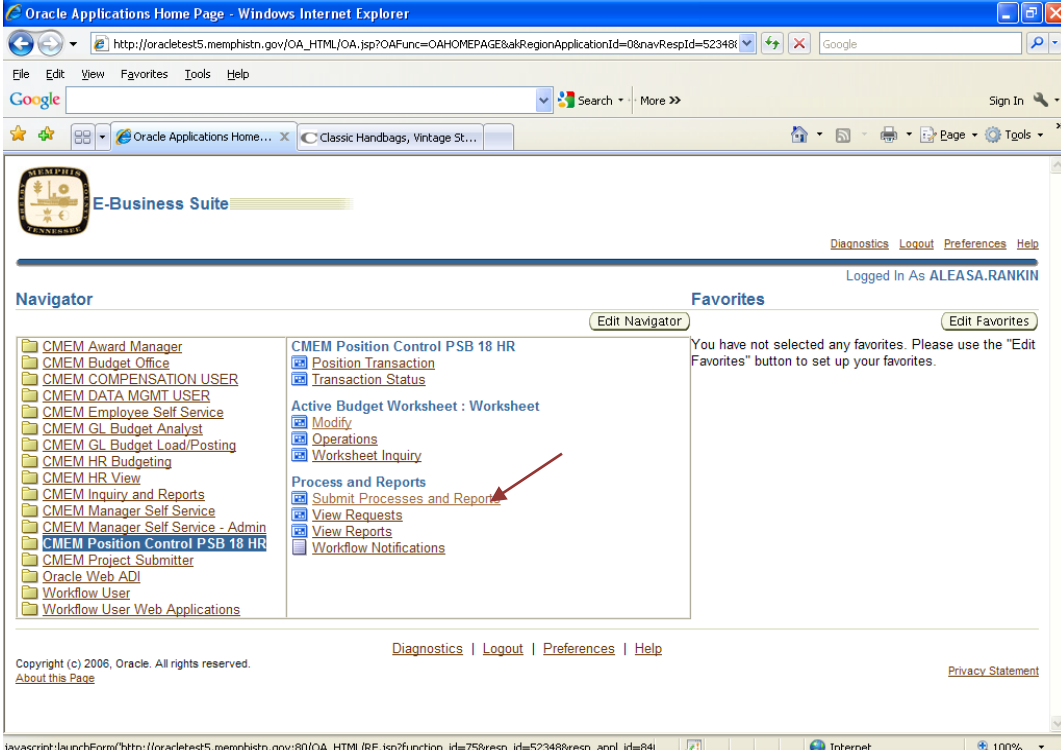
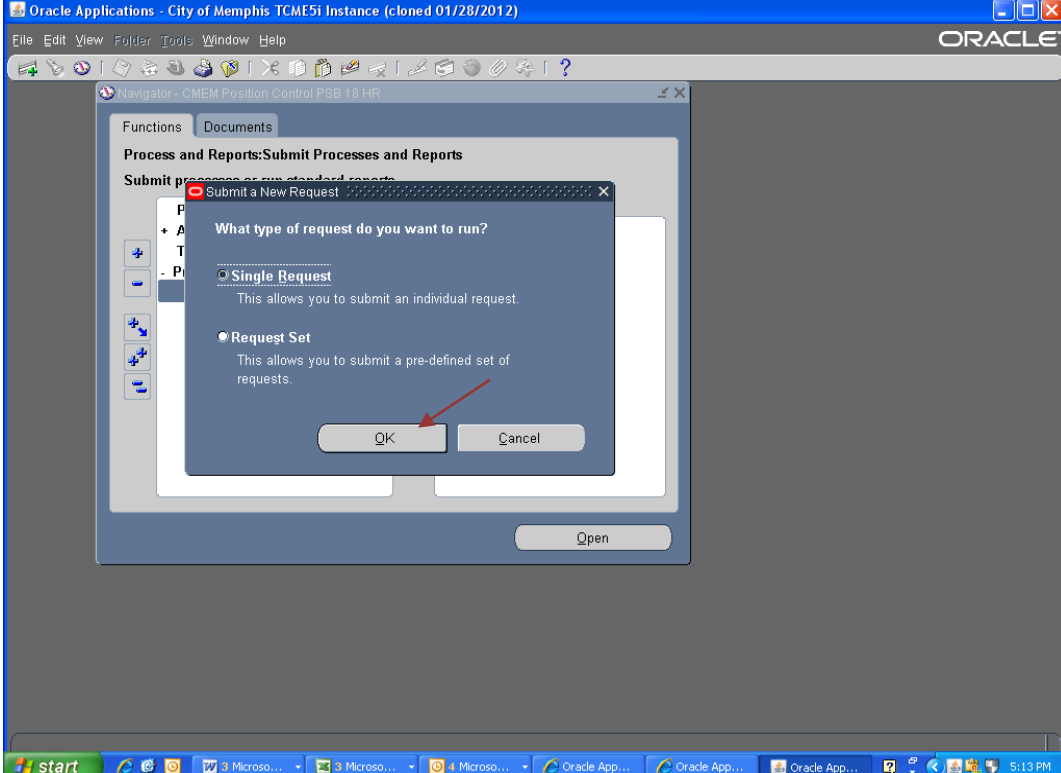
Include
Comments, if
needed

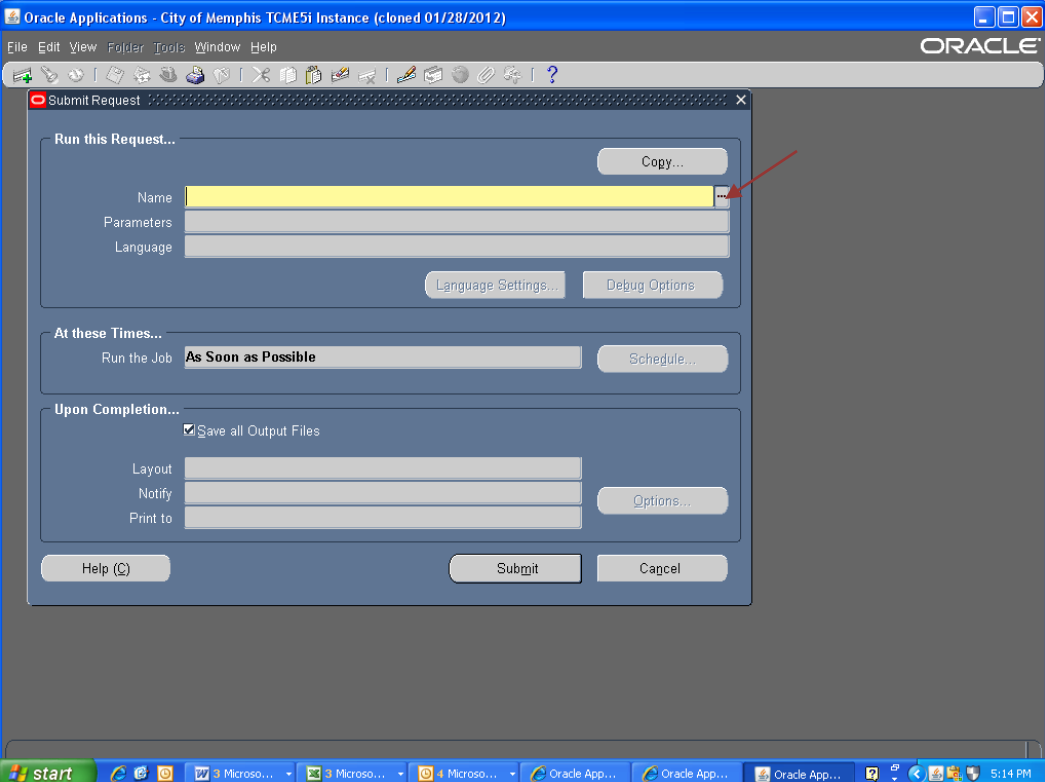
Click OK

See page 9 for
Workflow
notifications



Position Control Report

Responsibility & Navigation	Form	Comments
<p>CMEM Position Control PSB XX XX> Process and Reports> Submit Processes and Reports</p>	 <p>The screenshot shows the Oracle Applications Home Page in Internet Explorer. The user is logged in as ALEASA.RANKIN. In the Navigator pane, the 'Process and Reports' section is expanded, and 'Submit Processes and Reports' is highlighted with a red arrow. Other visible items include 'CMEM Position Control PSB 18 HR', 'Position Transaction', and 'Transaction Status'.</p>	
<p>Click OK</p>	 <p>The screenshot shows the 'Submit Processes and Reports' dialog box. A sub-dialog box titled 'What type of request do you want to run?' is open, with 'Request Set' selected. A red arrow points to the 'OK' button. The background shows the 'Submit Processes and Reports' page with a 'Submit a New Request' button.</p>	

Responsibility & Navigation	Form	Comments
<p>Click Name LOV...</p> <p>Select:</p> <p>Position Control Report - New</p>		

Parameters of Position Control Report appears (the only report for this responsibility). Parameters in yellow are required!

As of Date:

Date report is to reflect.

Division/Svc Ctr:

Location positions are. (if left blank, report will default to the worksheet level)

Report Level:

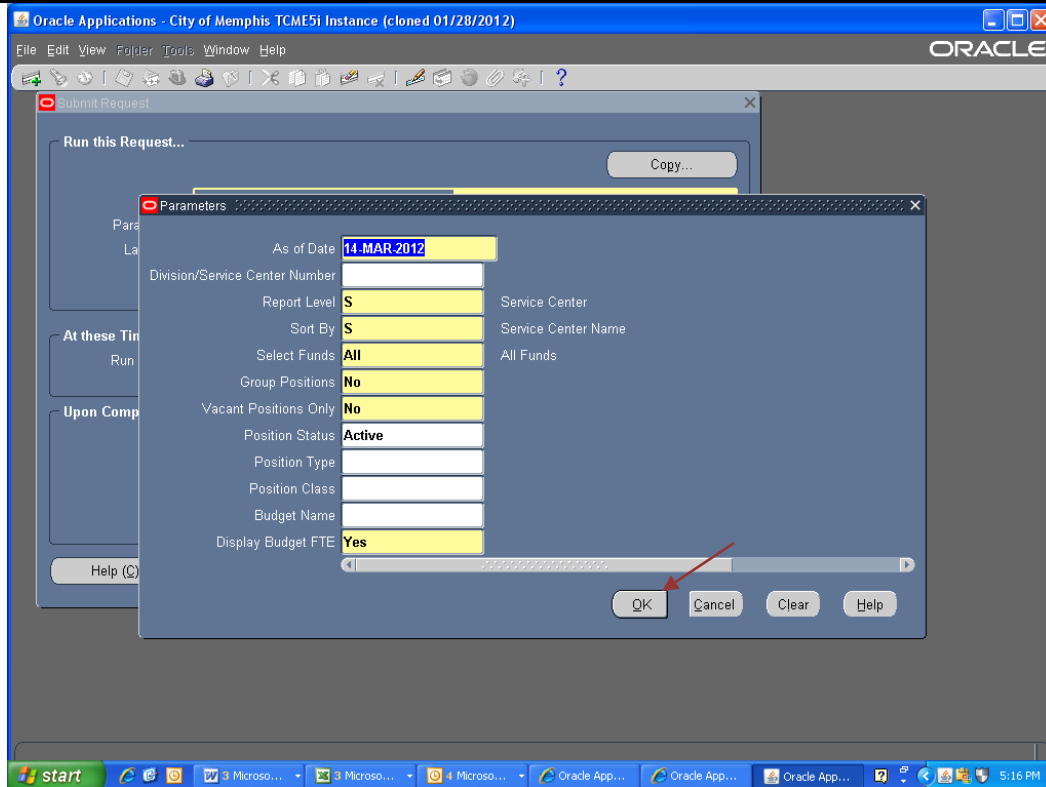
S-Service Center; L-Legal; D-Division; F-Fund; or C-City

Sort By:

Determines how report is sorted D-Division; G-Grade; P-Position; S-Service Center; or U-Union

Position Class:

Appointed-2; Civil Service-5; Civil Service Grant-4; Elected-1; Null-20; Temporary-7 or Temporary Grant-12



Select Funds:

All; General or Grant

Group Positions:

Will summarize report by position classification No or Yes

Vacant Positions Only:

No or Yes. Yes will produce a Vacancy Report.

Position Status:

Active; Deleted; Eliminated; Frozen or Proposed

Position Type:

FT-Full Time or T-Temporary

Budget Name:

Choose Budget. List changes with each budget year.

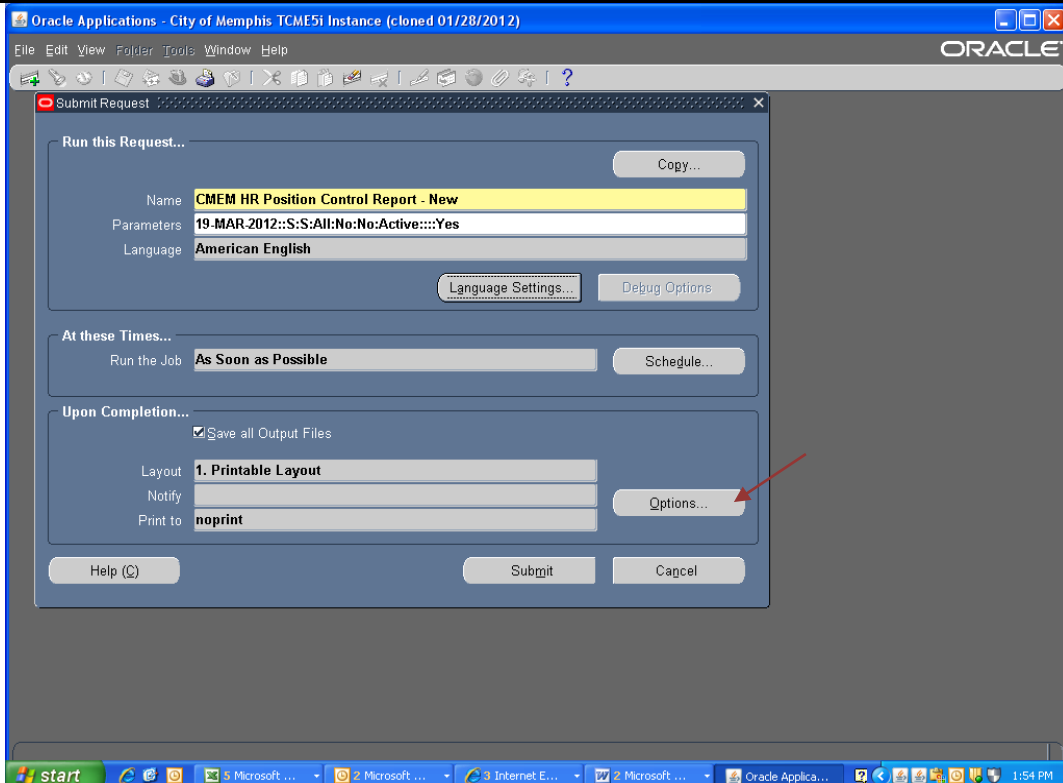
Display Budget FTE:

Determines where or not Budget info is displayed Yes or No

Click OK

The Position Control Report has print options:

- .pdf (default)
- Excel

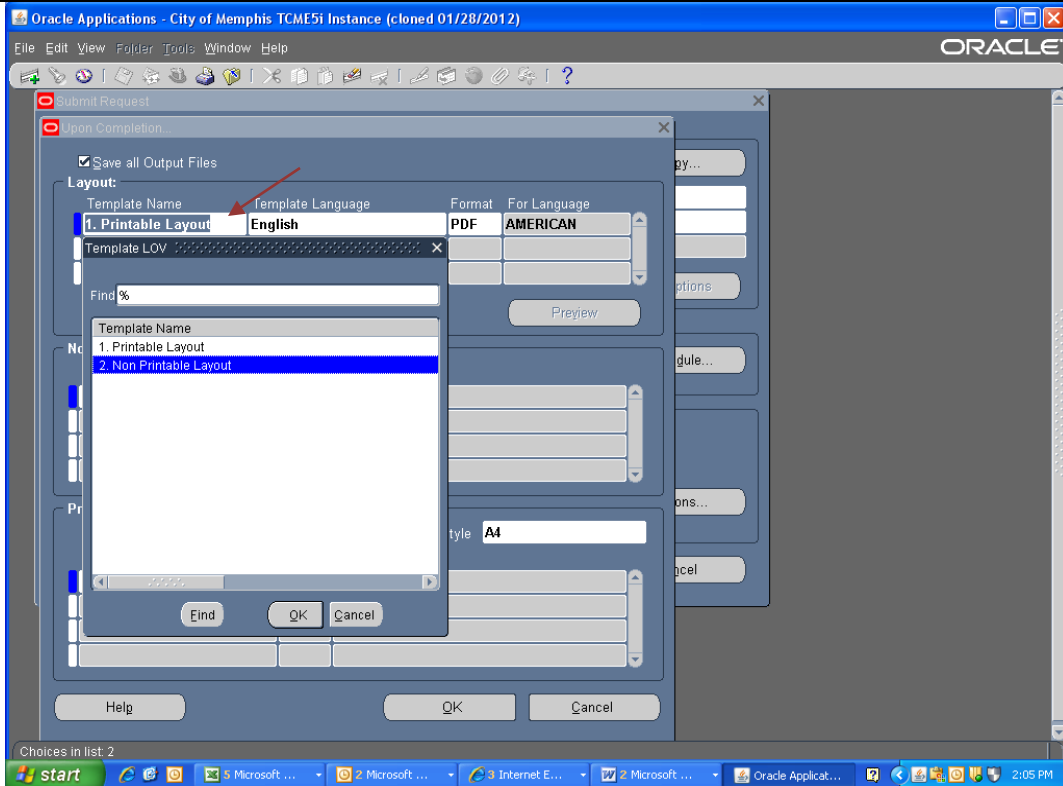


Click on Template type to determine format:

Printable Layout is .pdf (default format)

Non Printable changes format to EXCEL

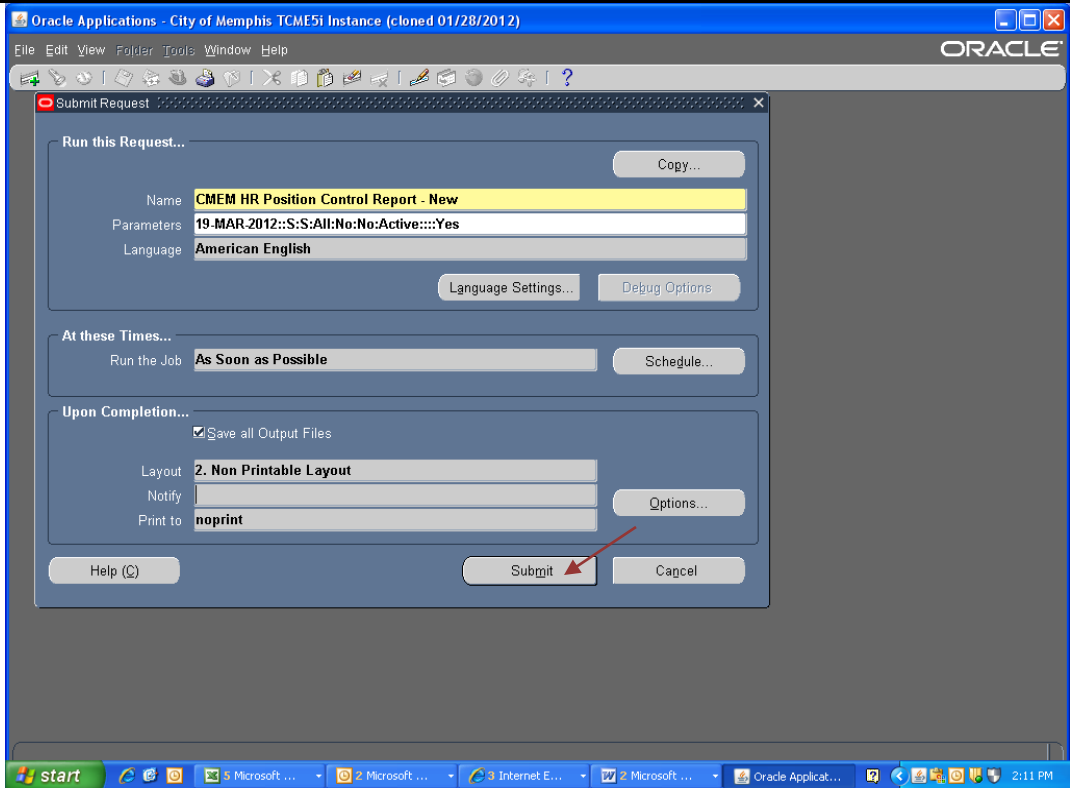
Click OK



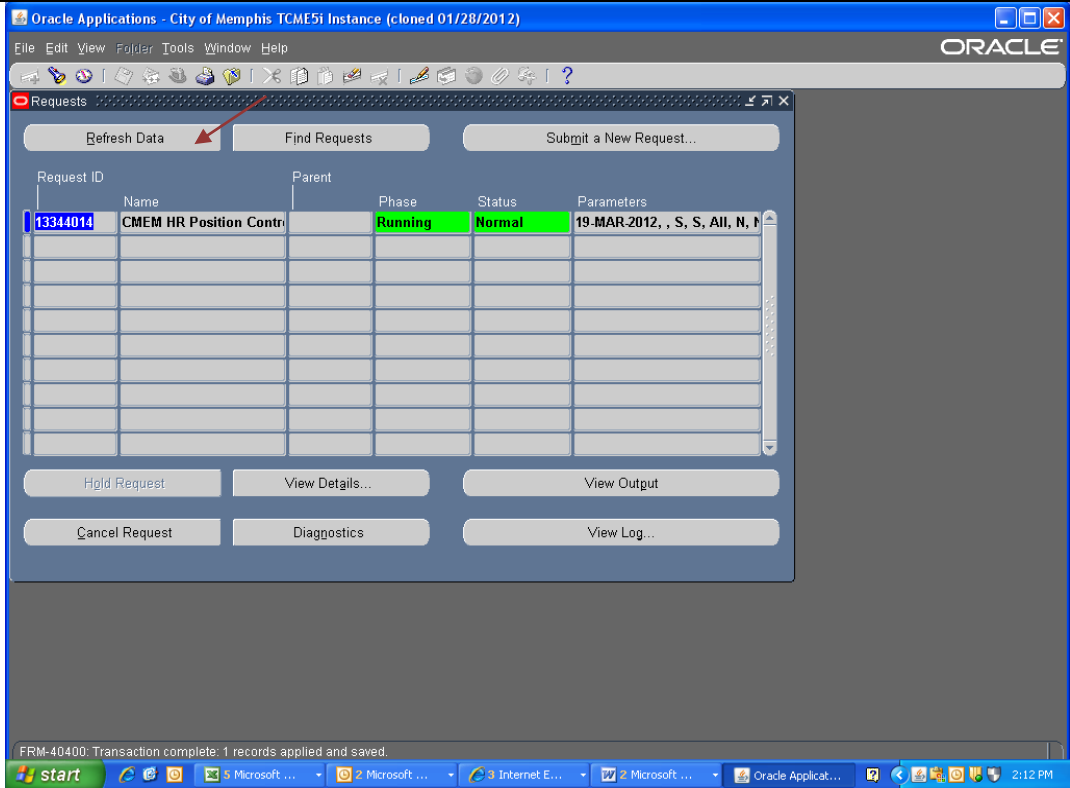
In the .pdf version, a record is contained on two lines and can not be manipulated.

In EXCEL, a record is on one line and can be manipulated (sorted, etc.)

Click Submit



In the window that pops up, click refresh to refresh the window until the job is complete.



When Phase is complete, click on View Output to:

- View .pdf version in Adobe
- Open worksheet in Excel.

The screenshot shows the Oracle Applications interface for the City of Memphis TCME51 Instance. The main window displays a table of requests. The table has columns for Request ID, Name, Parent, Phase, Status, and Parameters. Two rows are visible: one with Request ID 13344016 (Completed phase, Normal status) and another with Request ID 13344014 (Running phase, Normal status). Below the table, there are several buttons: Hold Request, View Details..., View Output (highlighted with a red arrow), Cancel Request, Diagnostics, and View Log.. The Oracle logo is visible in the top right corner of the application window. The Windows taskbar at the bottom shows the start button and several open applications including Microsoft Office and Internet Explorer.

Request ID	Name	Parent	Phase	Status	Parameters
13344016	CMEM HR Position Contr		Completed	Normal	19-MAR-2012, 10, S, S, All, N
13344014	CMEM HR Position Contr		Running	Normal	19-MAR-2012, , S, S, All, N, P