Job Aide: Assign Existing Position To A New Index Code – New Business Process
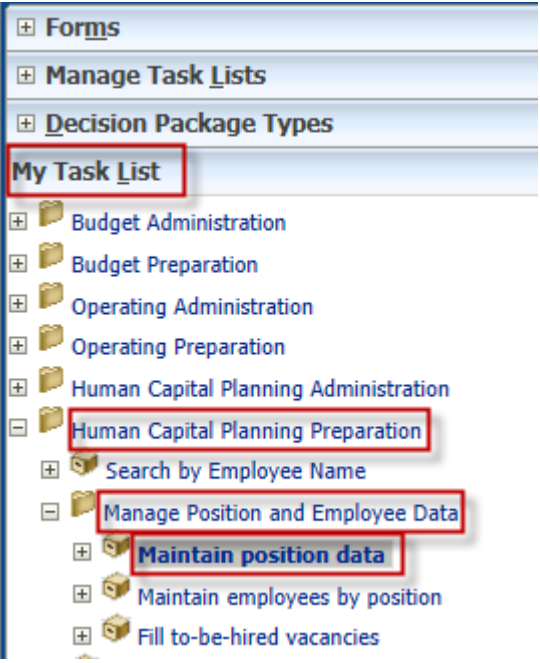
This job aide will assist in adding an existing Position to a new Index Code.
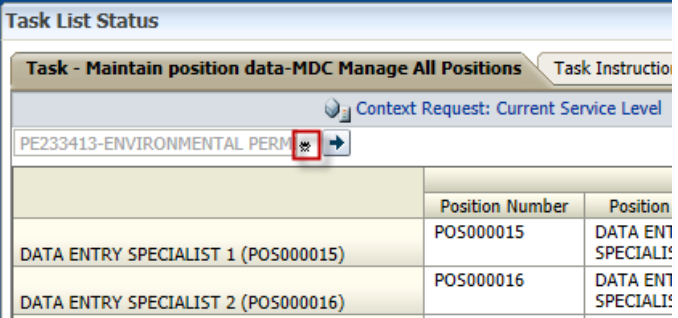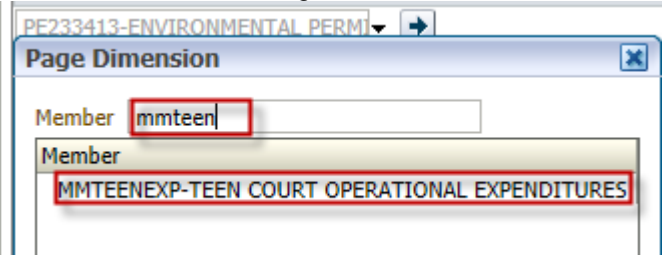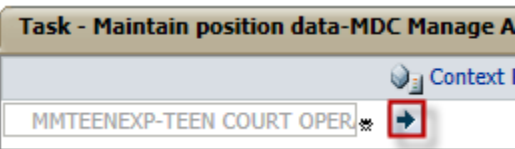
If you need to add a Position to an Index Code – and that Position already exists in BAT, you may add that Position (and all of its characteristics) to a current Index Code.
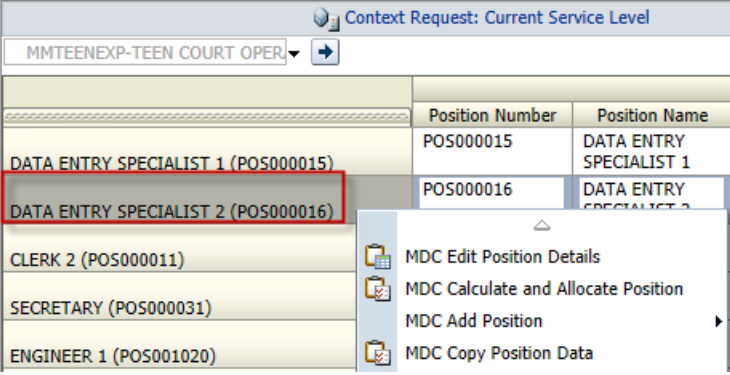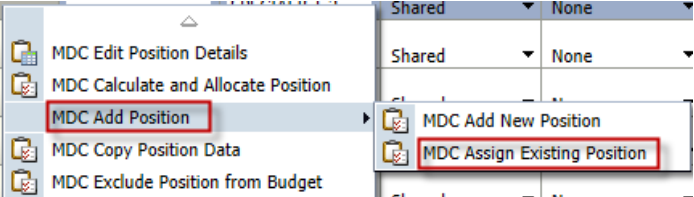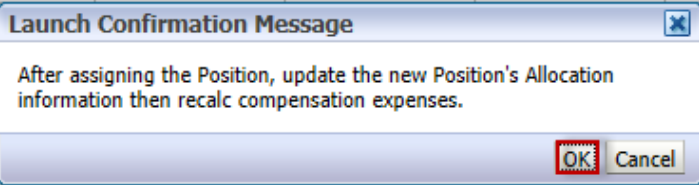
Once you assign the Position to the current Index Code, you must navigate to the Allocations Tab. You must add the Entity, Fund (and optionally Project and Grant) field(s), to represent the new Index Code location.
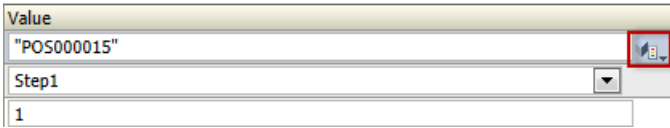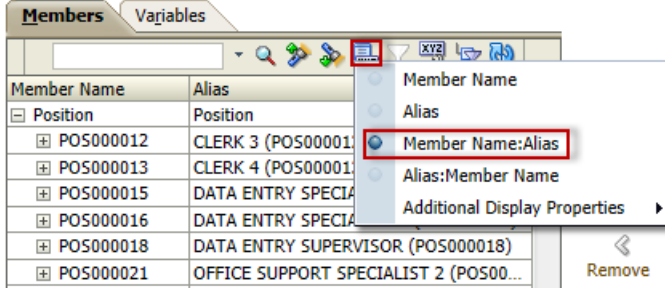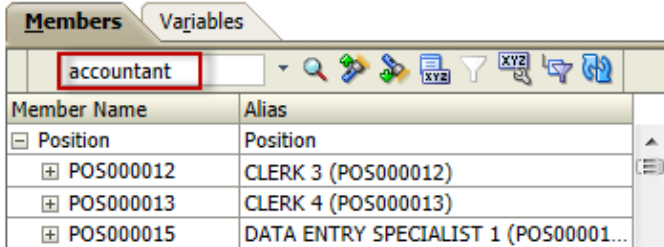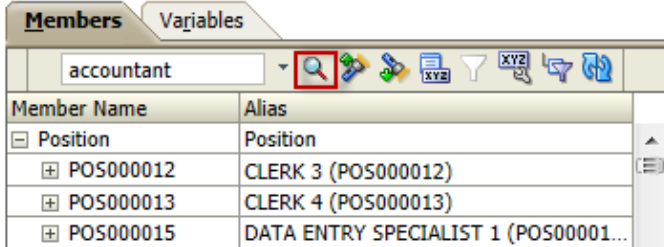
No employees are transferred in the Assign Existing Position business rule. Once the Assign Existing Position process is complete, you may use the Single Step Employee Transfer process to move employees into the target position.
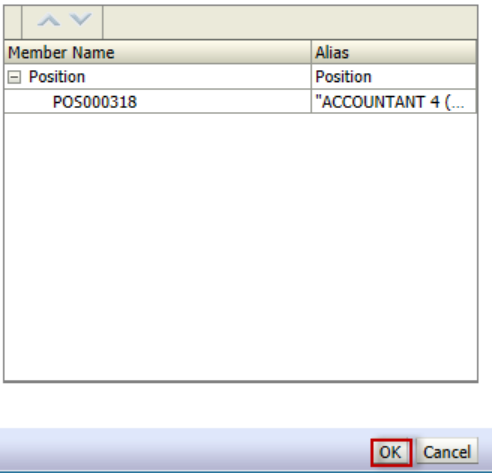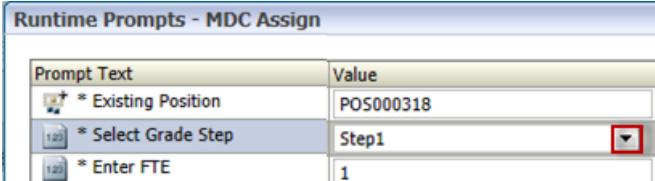
Follow the steps below to complete the process.
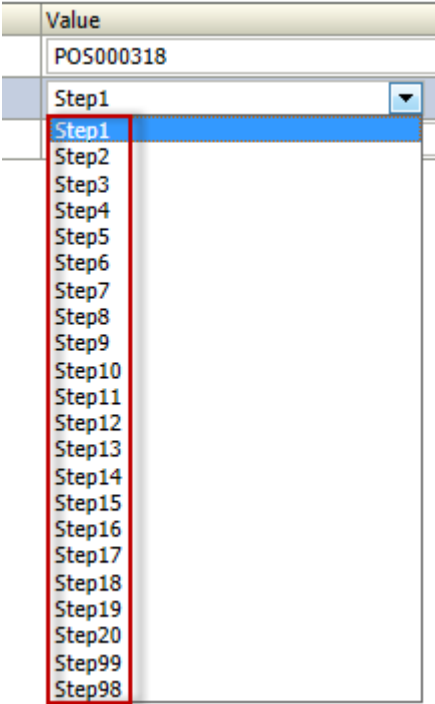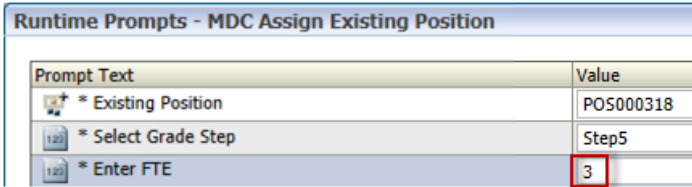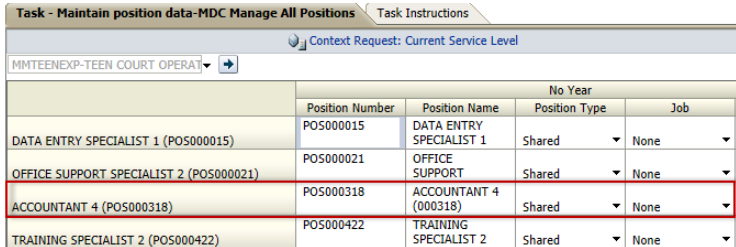
Step	Action	Notes
1.	From the Task List, navigate to **My Task List** > **Human Capital Planning Preparation > Manage Position and Employee Data > Maintain Position.**	

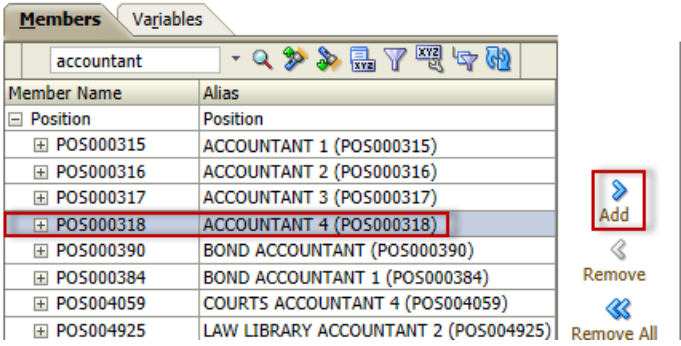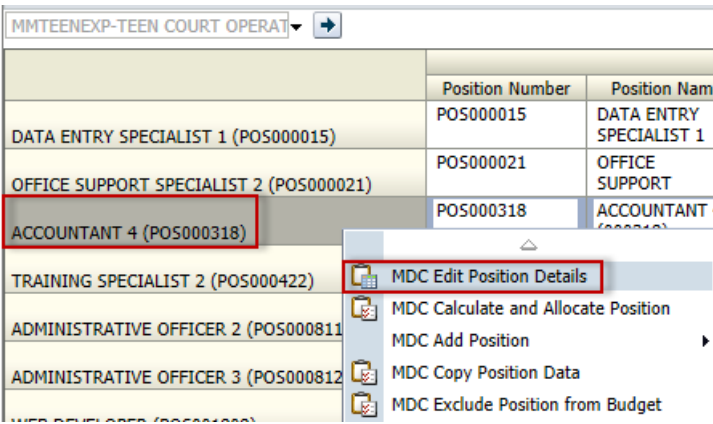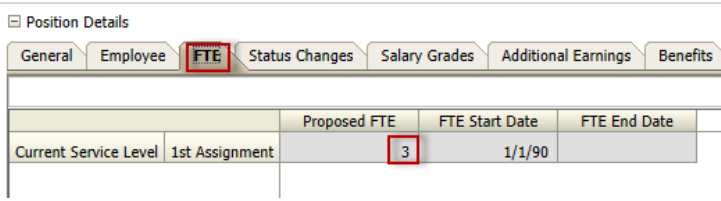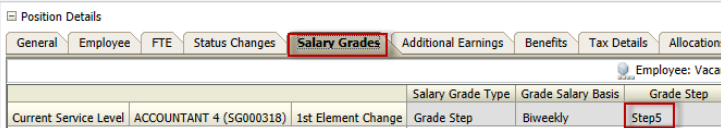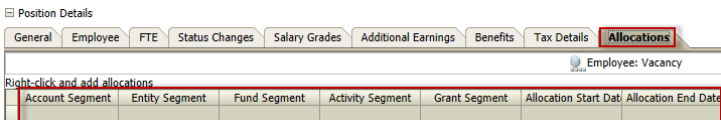| Step	Action	Notes
2.	From the **Page** drop-down list, select the **Index Code** where the new position needs to be added. Click the **down-arrow** next to the **Index Code** field. **Task List Status** Task - Maintain position data-MDC Manage All Positions ｜ Task Instruction Context Request: Current Service Level PE233413-ENVIRONMENTAL PERM Position Number ｜ Position POS000015 ｜ DATA ENT SPECIALIS DATA ENTRY SPECIALIST 1 (POS000015) POS000016 ｜ DATA ENT SPECIALIS DATA ENTRY SPECIALIST 2 (POS000016)	
3.	Type any or all or the **Index Code** name in the **Search** field and click the resulting name. PE233413-ENVIRONMENTAL PERMI **Page Dimension** Member ｜ mmteen Member MMTEENEXP-TEEN COURT OPERATIONAL EXPENDITURES	
4.	Click the **Go** arrow. **Task - Maintain position data-MDC Manage A** Context I MMTEENEXP-TEEN COURT OPER	
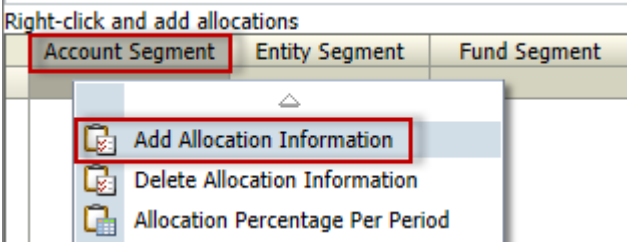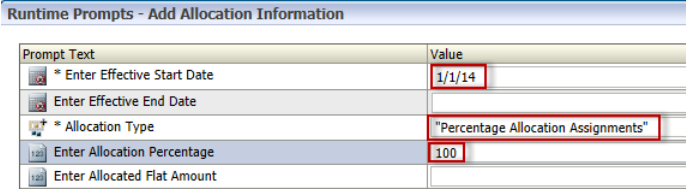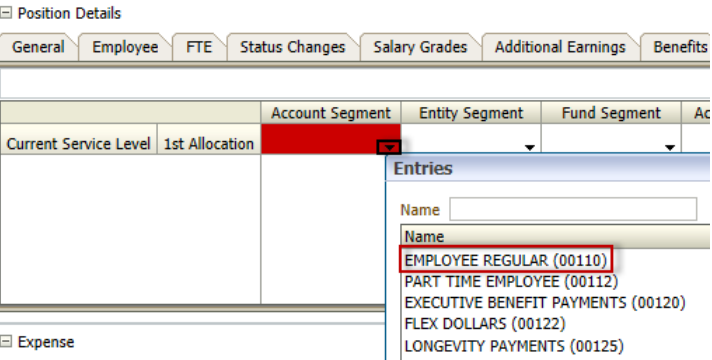
Step	Action	Notes
5.	From the list, right-click any **Position**. Context Request: Current Service Level MMTEENEXP-TEEN COURT OPER Position Number / Position Name POS000015 / DATA ENTRY SPECIALIST 1 DATA ENTRY SPECIALIST 1 (POS000015) POS000016 / DATA ENTRY SPECIALIST 2 DATA ENTRY SPECIALIST 2 (POS000016) CLERK 2 (POS000011) MDC Edit Position Details SECRETARY (POS000031) MDC Calculate and Allocate Position ENGINEER 1 (POS001020) MDC Add Position ▶ MDC Copy Position Data	
6.	Click **MDC ADD Position > MDC Assign Existing Position**. Shared ▼ None ▼ MDC Edit Position Details Shared ▼ None ▼ MDC Calculate and Allocate Position MDC Add Position ▶ MDC Add New Position MDC Copy Position Data MDC Assign Existing Position MDC Exclude Position from Budget	
7.	**Please read the following message!** Once you have assigned the position to its new location, you must go to the **Allocations Tab** and change the **Entity, Fund, Project and/or Grant** information to reflect the new location information. Click **OK**. **Launch Confirmation Message** ✖ After assigning the Position, update the new Position's Allocation information then recalc compensation expenses. OK Cancel	
8.	The **MDC Assign Position Screen Appears**: Make selection for the 3 available fields: • **Existing Position** • **Select Grade Step** • **Enter FTE**	
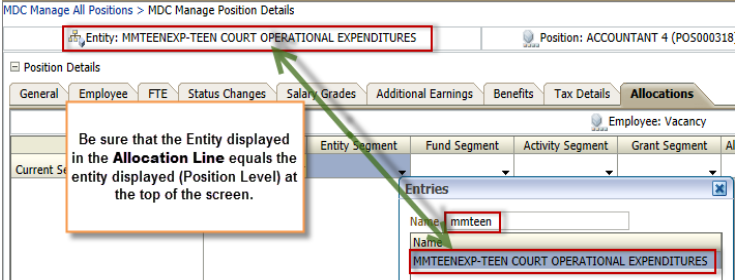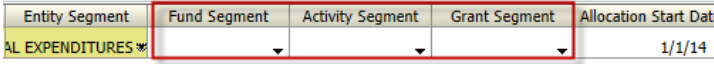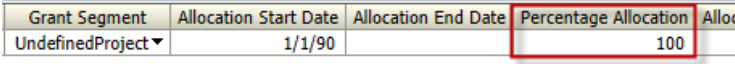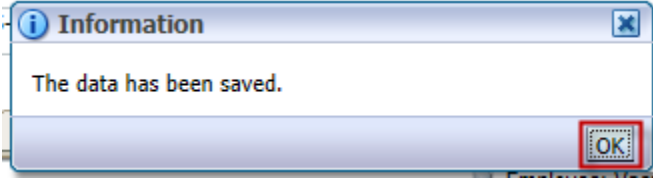
9.	To change the **Existing Position** field, click the **Search Icon** located on the right side of the field.	If you know the Position Number (or name) name, you may simply type it in the field.
10.	To display the **Position** descriptions, click the **Description Icon** and select **Member Name:Alias.**	
11.	In the **Search Field**, type any part of the position number or name.	
12.	Click the **Search** icon.	
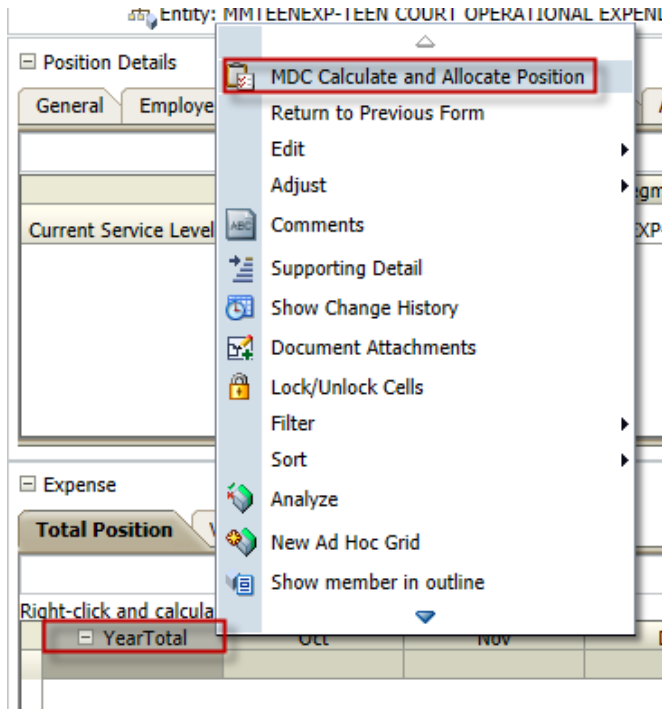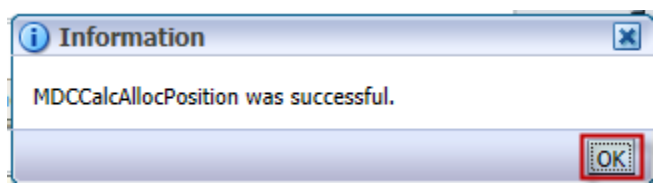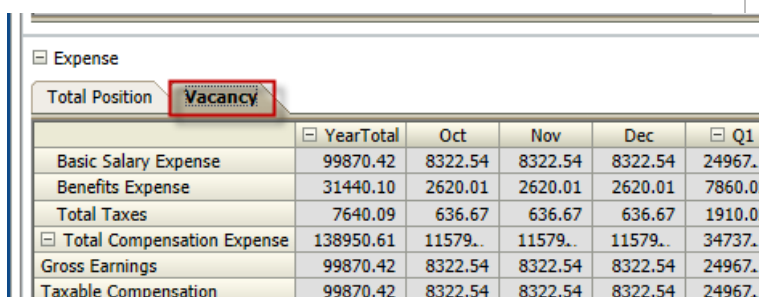
Step	Action	Notes
13.	Click the **Position** from the list and click the **Add Arrow**.	
14.	At the bottom right corner of the screen, click **OK**.	
15	In the **Select Grade Step** field, click the drop-down arrow.	

Step	Action	Notes
16.	Click the **Step** sequence value for the Position. Value POS000318 Step1 Step1 Step2 Step3 Step4 Step5 Step6 Step7 Step8 Step9 Step10 Step11 Step12 Step13 Step14 Step15 Step16 Step17 Step18 Step19 Step20 Step99 Step98	If you select the wrong Step number on this step and save it to the database, you may reassign it by navigating to the Manage Positions > Salary Grades. You may delete the incorrect Salary Grade entery and create a new one with the correct Step information.
17.	In the **Enter FTE** field, type the total number of FTEs for the Position. **Runtime Prompts - MDC Assign Existing Position** | Prompt Text	Value
* Existing Position	POS000318
* Select Grade Step	Step5
* Enter FTE	3		**FTE** = Full Time Equivalent.
18.	Once the fields are populated, click **Launch**. Launch Cancel	
19.	Once the rule has been launched you will see the new Position has been added to the current Index Code. Task - Maintain position data-MDC Manage All Positions Task Instructions Context Request: Current Service Level MMTEENEXP-TEEN COURT OPERAT▼ 			No Year		
	Position Number	Position Name	Position Type	Job
DATA ENTRY SPECIALIST 1 (POS000015)	POS000015	DATA ENTRY SPECIALIST 1	Shared ▼	None ▼
OFFICE SUPPORT SPECIALIST 2 (POS000021)	POS000021	OFFICE SUPPORT	Shared ▼	None ▼
ACCOUNTANT 4 (POS000318)	POS000318	ACCOUNTANT 4 (000318)	Shared ▼	None ▼
TRAINING SPECIALIST 2 (POS000422)	POS000422	TRAINING SPECIALIST 2	Shared ▼	None ▼		

Step	Action	Notes
20.	Right-click the new **Position Number** and **select MDC Edit Position Details**. MMTEENEXP-TEEN COURT OPERAT ▼ → Position Number	Position Nam DATA ENTRY SPECIALIST 1 (POS000015) — POS000015	DATA ENTRY SPECIALIST 1 OFFICE SUPPORT SPECIALIST 2 (POS000021) — POS000021	OFFICE SUPPORT ACCOUNTANT 4 (POS000318) — POS000318	ACCOUNT TRAINING SPECIALIST 2 (POS000422) ADMINISTRATIVE OFFICER 2 (POS000811) ADMINISTRATIVE OFFICER 3 (POS000812) MDC Edit Position Details MDC Calculate and Allocate Position MDC Add Position ▶ MDC Copy Position Data MDC Exclude Position from Budget	
21.	All of the characteristics of the existing Position are displayed in the Position Details. Click the **FTE** tab and it will display the number you selected in step 17 above. ⊟ Position Details General	Employee	FTE	Status Changes	Salary Grades	Additional Earnings	Benefits 		Proposed FTE	FTE Start Date	FTE End Date Current Service Level	1st Assignment	3	1/1/90		Click the following tabs to view the copied characteristics of the Position: • Additional Earnings • Benefits • Tax Details
22.	Click the **Salary Grades** tab. You will see the **Grade Step** you selected in step 16 above. ⊟ Position Details General	Employee	FTE	Status Changes	Salary Grades	Additional Earnings	Benefits	Tax Details	Allocations Employee: Vacancy 					Salary Grade Type	Grade Salary Basis	Grade Step Current Service Level	ACCOUNTANT 4 (SG000318)	1st Element Change	Grade Step	Biweekly	Step5	If you need to change the **Grade Step** number for the Position, simply right-click the detail line and delete the **Salary Grade Line**. You will then add a new **Salary Grade** line with the correct **Grade Step** information.
23.	Click the **Allocations Tab**. You will notice that no information is displayed. You will need to add Allocation information ⊟ Position Details General	Employee	FTE	Status Changes	Salary Grades	Additional Earnings	Benefits	Tax Details	Allocations Employee: Vacancy Right-click and add allocations Account Segment	Entity Segment	Fund Segment	Activity Segment	Grant Segment	Allocation Start Dat	Allocation End Date	

Step	Action	Notes
24.	Right-click the **Account Segment** column header and select **Add Allocation Information**.	
25.	On the **Add Allocations** screen, enter the following information: • **Enter Effective Start Date** – Enter the Start Date • **Allocation Type** – Always select Percentage Allocation Assignments • **Enter Allocation Percentage** – Always enter 100	
26.	Click **Add**. At the confirmation screen, click **OK**.	
27.	Locate the **Account Segment** field. Click the arrow icon and from the list, select **Employee Regular (00110)**.	

Step	Action	Notes
28.	Locate the **Entity Segment** field. Click the arrow icon and the Entity (index code) list displays. Type any or the entire Entity name in the **Search** field. MDC Manage All Positions > MDC Manage Position Details Entity: MMTEENEXP-TEEN COURT OPERATIONAL EXPENDITURES Position: ACCOUNTANT 4 (POS000318 Position Details General Employee FTE Status Changes Salary Grades Additional Earnings Benefits Tax Details **Allocations** Employee: Vacancy Be sure that the Entity displayed in the **Allocation Line** equals the entity displayed (Position Level) at the top of the screen. Entity Segment Fund Segment Activity Segment Grant Segment Entries Name: mmteen Name MMTEENEXP-TEEN COURT OPERATIONAL EXPENDITURES	**Important:** The **Entity** number you select for this field **MUST** be the same entity as displayed at the top of the screen!
29.	Make selections for the following fields as required for this Position: • **Fund Segment** • **Activity (Project) Segment** • **Grant Segment** Entity Segment Fund Segment Activity Segment Grant Segment Allocation Start Dat AL EXPENDITURES 1/1/14	All three of these fields must be populated in the Allocations line. If there is no Activity (Project) or Grant, use the following values: • **Activity:** UndefinedActivity • **Grant:** UndefinedProject
30.	Be sure that in the **Percentage Allocation** field is set to **100**. Grant Segment Allocation Start Date Allocation End Date Percentage Allocation Allocat UndefinedProject 1/1/90 100	There may be rare cases where this field is set to a lesser value based on multiple allocation lines. **Please contact your Budget Analyst if you think this value is other than 100%.**
31.	Once all changes have been made, click the **Save Icon** on the toolbar. ORACLE Enterprise Performance Manag Navigate File Edit View Favorites Tools Explore	
32.	At the confirmation message, click **OK**. Information The data has been saved. OK	

Step	Action	Notes
33.	In order to view the compensation for the Position, you must perform the calculation. Go to the lower portion of the screen and right-click the words **Year Total** and from the list, click **MDC Calculate and Allocation Position**.	
34.	Once the calculation is complete click **OK**.	
35.	The position has now been calculated. You may click the **Vacancy Tab** to view the compensation calculation for the number of **FTEs** you selected.	

36.	Now that the **Position** is complete, you may begin transferring employees into the Position using the **Single Step Employee Transfer** business rule.	See the Training Guide for instructions on **Single Step Employee Transfers.**

--END--