

PeopleSoft Position Management Changes in HRMS

Background

When the University of Waterloo (UW) implemented PeopleSoft HRMS version 6.01 in November 1998, a component of the implementation included partial position management. Since November 1998, UW has used partial position management in versions 6.02, 7.51 and hopes to continue using the functionality in version 8SP1 beginning November 2002.

HRMS version 8 (v8) is introducing some changes to position management functionality. It is the University's understanding that the basis for change is related to Multiple Components of Pay functionality improvements in v8 or for unknown reasons. (See Appendix A: Position Management Cases.)

The following table lists fields that are used by the University related to Position Management functionality. The table is describing how the data flows/does not flow from job code to position data to job in version 8 when there is a change to the data. The data in the table below did flow between job code, position data and job data in version 7.51. Here are some examples from the table below, provided to assist with reading the table:

Example 1: If there is a change to the FTE for a new position or existing position, there is no flow from position data to job for a new or existing incumbent. The "no flow" on job is highlighted to express UW's concern with the change in functionality.

Example 2: If there is a change to the grade on the jobcode table, then the grade change flows to a new position or an existing position but there is no flow to a new incumbent or an existing incumbent. The "no flow" on job is highlighted to express UW's concern with the change in functionality.

| | Jobcode | Position Data | | Job Data | |
|----------------------|----------------|----------------------|-----------------|----------------------|---------------------------|
| Field | | New | Existing | New Incumbent | Existing Incumbent |
| action date | n/a | change | change | no flow | no flow |
| adds to FTE actual | n/a | change | change | Flows | Flows |
| business unit | n/a | change | change | Flows | n/a |
| classified indicator | n/a | change | change | Flows | flows |
| company | n/a | change | change | Flows | flows |
| department id | n/a | change | change | Flows | flows |
| effective date | n/a | change | change | Flows | flows* |

Example 1:

Example 2:

| | Jobcode | Position Data | | Job Data | |
|---------------------|----------------|----------------------|-----------------------|----------------------|---------------------------|
| Field | | New | Existing | New Incumbent | Existing Incumbent |
| FTE | n/a | change | change | no flow** | no flow** |
| full time/part time | n/a | change | change | Flows | no flow** |
| grade | change | flows | flows | no flow** | no flow** |
| jobcode | n/a | change | change | Flows | Flows |
| location | n/a | change | change | Flows | Flows |
| reg/temp | change | flows | flows | Flows | Flows |
| salary plan | change | flows | no flow** | no flow** | no flow** |
| standard hours | change | flows | no flow** | no flow** | no flow** |
| step | change | flows | no flow** | no flow** | no flow** |
| union code | change | default | default | Default | no default |
| jobcode title | change | flows | no flow** | n/a | n/a |
| jobcode short title | change | flows | no flow** | n/a | n/a |
| position title | n/a | change | change | Flows | no flow** |
| paygroup | n/a | no longer available* | no longer available** | no flow** | no flow** |

Notes:

* A new effective dated row in position data will only flow through to job data for a current incumbent if the effective date is a current or future dated row in both position data and job data. It will not flow through to job data to maintain history.

** The double asterisks identify where UW is concerned with the change in functionality. The implications of the change are described below.

Implications: UW Business Processes affected by Position Management Changes

All ongoing, full and part-time positions are assigned unique position numbers in HRMS. There are approximately 3300 active positions which can be vacant or filled by an incumbent. Of these active positions, there are approximately 3000 active employees which hold these positions; which is approximately one third of the University's workforce.

Given the recent changes to position management, UW considered creating positions which employees could move in and out of more readily. For example, if an employee was reclassified, they would be assigned to a new position. With this type of implementation, it was determined there would be too many positions to manage and render position management functionality ineffective for UW.

1. Reclassification and Promotion

A reclassification facilitates the re-evaluation of an existing position where the duties and/or responsibilities have significantly changed. A promotion occurs when there is a job change between departments within the same position and an increase in salary occurs. On average, UW has 250 reclassifications per year and 50 promotions per year. The number of reclassifications is expected to grow over the coming years. While UW budgets by position and by employee, reclassifications are completed at the employee level. These changes are currently implemented in position data by a HR Departmental Assistant and a Wage and Salary Analyst.

Salary specific information (grade, plan, step) is only changed on the jobcode table if all positions attached to that jobcode are reclassified or if that jobcode is unique to a position.

A new row is inserted on position data and new salary-related information is entered with the new effective date. In previous releases (before 8), this information would flow through to job data, as long as the effective date on the position was a current or future dated row on both position and job. In version 8, this information no longer flows to job data and must be updated manually on position data, job data and if required, on the jobcode table.

A reclassification can affect: salary grade, salary plan, step, hours, FTE and title.

The greatest area of UW's concern for reclassifications with the changes introduced to Position Management version 8 functionality is related to salary data changes. In version 7.51, the Wage & Salary Analyst would enter the reclassification information on the jobcode and position data panels. The data would then flow to job data via the position management functionality. In version 8, the Wage and Salary Analyst will do the same work as in version 7.51, but data will also have to be updated on job data. This introduces double data entry and data integrity issues. Where the University already faces a huge workload around the ownership of PeopleSoft HRMS, double data entry is not a favourable option.

Until now, UW has also been able to separate responsibility within HR of updates to Position Management type information from updates to Job data. If other modifications are made on position data that do flow to job data then there is also an issue with who is allowed correction access. The row will automatically be inserted into job data for the other information to flow but the salary data will not flow. Correction access will be required on job data to override position data and update the salary information.

2. Titles

The University keeps the title on the jobcode fairly generic. However, jobcode titles can be changed and are often more detailed on position data. The University often uses the title to help define a group of employees, especially for reporting purposes. The University is concerned that the title is no longer flowing when there is an existing incumbent in a position. Once again, this leads to data integrity issues.

3. Paygroup

In version 8, the paygroup field is no longer stored on position data. In previous versions, this field was part of position data and would flow through to the incumbent on job data. In addition, a job data record can now be saved in version 8 without a paygroup attached to an employee.

The University is concerned about these modifications and the fact that it is another field to be maintained on job data. This is a very important field for payroll processing and must be maintained correctly. Many critical reports, including position reports, are driven by paygroup. For example, tracking the number of approved, permanent, ongoing, full-time and/or part-time positions and how they are funded (known as complement) is critical information for budgeting at UW. Tracking and reporting positions by paygroup is a critical component of the complement/not-in complement reporting.

4. FTE and full time/part time

The University performs permanent, ongoing changes in position management for FTE and Full/Part-time. Temporary changes to these fields for an employee are only done on job data.

When the information no longer flows from position to job data, UW relies on manual modifications which increase our concerns about data integrity. If the modifications are not done consistently on position and job data, it may be deceiving and look like the changes to FTE or full time/part time are temporary in nature.

5. Future/Other Impacts

- Concurrent/multiple jobs: UW is planning the implementation of current/multiple jobs in early 2003. With concurrent/multiple jobs implementation, the lack of flow from position management will exacerbate the data integrity issues because the number of positions will increase.
- Business process ownership: Currently, our HR Departmental Assistant and Wage and Salary Analyst manage job code and position data. These roles understand how the data flows through the system, and how this data impacts other data within and external to the system. If the Payroll and Benefits Assistants (PBA) manage the salary grade, salary step and salary plan and other former position managed data, we will lose the sensitivity to data accuracy and data consistency. The PBA role typically

manages an employee's job data at UW. There is also a requirement, which our auditors stress, that division of responsibility must exist between HR functions and payroll functions. Position management as delivered in version 7.51 has allowed the University to segregate HR and payroll functions. Version 8SP1 is making those lines of segregation less clear and forcing the University to be less responsible about meeting this requirement.

- Salary Program: UW has built a "bolt-on" to HRMS for our unique staff salary increase processing. In the next few years, we hope to write a similar bolt-on for our faculty increase processing. The success of the salary increase programmes depends entirely on the accuracy and correctness of salary-related information. The FTE and full time/part time data are critical components for the success of salary programme.
- Complement/Budget & Encumbrance functionality: Interfaces to the University's external Salary Management System (SMS) are very heavily dependent on position and job information for accurate salary budgets and encumbrance calculations
- Recruit Workforce: UW hopes to implement the Recruitment Module in the near future. We suspect there may be additional data integrity issues when data is not flowing through position management.

Recommendation:

PeopleSoft re-establish the position management functionality delivered in HRMS E&G 7.51 in HRMS v8.

Appendix A: UW Position Management Correspondence with PeopleSoft

The University of Waterloo has corresponded with PeopleSoft regarding Position Management through the following:

1. 1433903 -- PS_POSITION_DATA.SAL_PLAN_DFLT & 1433894 -- Classified Indicator did not convert properly on upgrade: UW had many data conversion problems related to position data, which were corrected in subsequent test moves. There were many emails written to our account executive, Maria Har, Ian Plummer and Anita Aown, Canadian Upgrade Lab Manager discussing how the upgrade went. There seemed to be many upgrade issues related to E&G functionality in general.
2. 1553655: job title doesn't flow to position data on existing positions
3. 1463344: posn data not updating FTE and std hours on job data
4. 1435967: position_nbr does not default in leading zeros after upgrade