



HRIS Job Role Training

Position Training

Forms: XP02, ZP02

Table of Contents

Introduction	3
Position Code Basics	4
Position Training Introduction	6
Position Form (XP02)	8
Add Position Code - Main Tab	8
Add Position Code - Structure Tab	11
Add Position Code - Payroll Tab	14
Update Position Code - Main Tab	18
Update Position Code - Structure Tab	21
Update Position Code - Payroll Tab	23
User Fields Link	27
Inactive Position Code - Main Tab	29
Delete Position Code - Main Tab – POSITION CREATED IN ERROR	32
Agency Position Maintenance Form (ZP02)	34
Update Position Fields – Main tab	34

Introduction

The HRIS Position Training Manual is divided into two major sections: Position Code Basics and Position Training.

The **Position Code Basics** section will outline how position codes are setup in the HRIS State Personnel and a description of the hierarchy for defaulting in HRIS. This section will also outline some critical points regarding the assignment and allocation of positions.

The **Position Training** section will explain how to use the two forms in HRIS related to the setup and maintenance of State of Arizona Positions.

The Non State Personnel Specialist and ADOA Central Class and Compensation Administrator use the Position Form (XP02.1) to create, update and inactivate Position Codes.

Agency HR Initiators in State Personnel Agencies use the Agency Position Maintenance Form (ZP02) to update selected fields on the Position including: Supervisor Code, Supervisor Link, User Level, security, accounting, and location information.

Agencies should review the entire training manual, although they may/may not have access to all of the forms outlined.

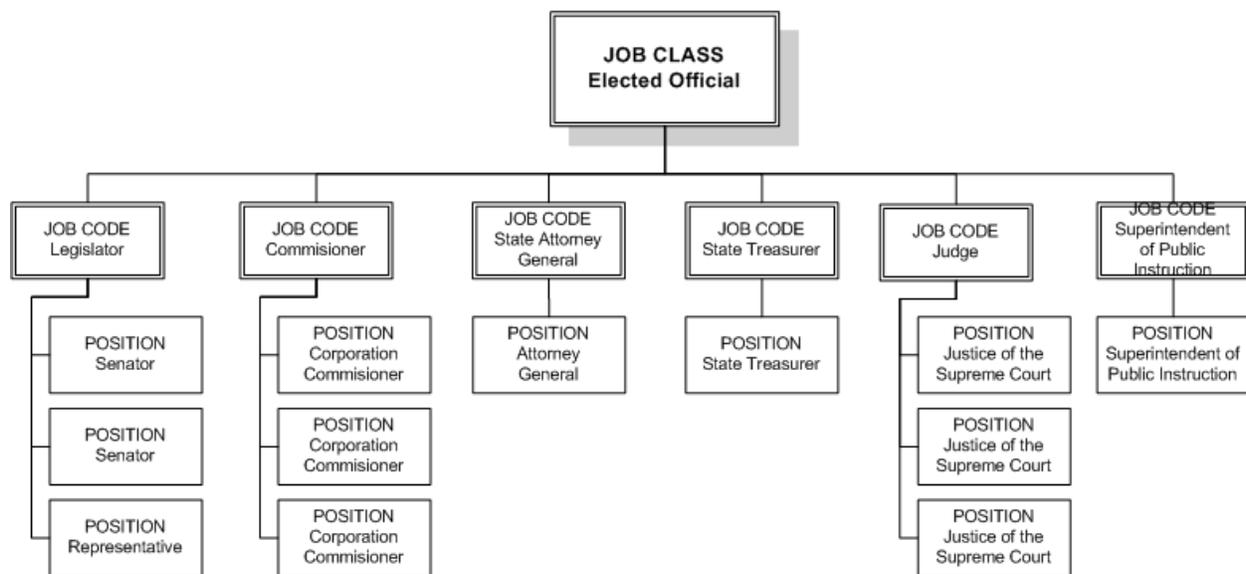
For additional information on the setup of HRIS expense accounts, please refer to the HRIS Labor Distribution Training.

Position Code Basics

Position Codes and Descriptions are an integral part of the process that identifies the work employees perform at the State. Positions are specific to each employee, and more precisely define the type and level of work, than do Job Codes or Job Classes.

Job Classes are broad categories of types of work and often have no distinction from the lowest graded job to a management level job. **Job Codes** are generic work functions at the same level of authority, responsibility and accountability. Many different types of Job Codes may fit into one Job Class. Similarly, there may be many **Positions** allocated to one Job Code. Each employee is assigned to a unique position code.

Sample Position/Job Code/Job Class Hierarchy



Each Position Code has the following guidelines:

- Is comprised of twelve (12) alphanumeric characters
- Designates the Personnel State Personnel Agency
 - S = State Personnel System Agency (SPS) Position (First character of position)
 - Agency Code (Second and Third character of position)
 - Sequential numbers – auto-generated by ADOA

Assignment/Allocation of Positions

- Using Form XP02.1, Positions are established, reclassified or inactivated only by these Job Roles:
 - ADOA Central Class and Compensation Administrator
 - Agency Non-State Personnel Specialist.
- State Personnel agencies may utilize the ZP02.1 to modify some information on the position, including Location, Labor Distribution, User Level and Security. However, Effective Date, Status, Department, Description, Schedule, Grade, EEO Code, Workers' Compensation Class may not be changed on this form.
- Once created, agency Human Resources staffs may move employees in and out of Active Positions as needed via a Personnel Action (XP52.1).
- Positions are always assigned a Full Time Equivalent (FTE) of 1.0. Employees are also assigned an FTE – up to a total of 1.0. Thus, an employee in a Position who works less than full-time would have an FTE of 0.25, 0.50 or 0.75, rather than 1.0.
- Positions are assigned to one Employee at a time.
- When an Employee is assigned to a Position via the XP52.1, you **MUST** click the FILL DEFAULTS button so that data from the Position will default automatically to the Employee, thus saving many keystrokes and reducing the potential for input errors.
- Positions can never be totally eliminated from HRIS because historical information on the Position.

Important

- If a Position Code is NEVER to be used again, the Position must
 - Be Vacant
 - Be Assigned a new **Begin** Date
 - Be changed to a Status of Inactive (5) or Abolished (3)
 - Have a Reason Code of DO NOT USE, INACTIVATE POSITION, LINK INACTIVATION, or one of the abolished (AB-) reasons, and
 - Be entered as an **Add**, rather than a Change, to preserve position history.

Position Training Introduction

Both the ADOA Central Class and Compensation Administrator role and the Non-State Personnel Agency Specialist role may create, update and inactivate Position Codes in their entirety. These job roles use the **Position Form (XP02.1)** to establish a new Position Code, to reallocate a Position Code (e.g., change a Schedule and Grade or Process Level), change the Title, change the funding data, etc.), or to make the Position Code inactive when it should not be used, or when it is no longer in use by the Agency.

Lines of position history will be added in HRIS by using a new effective date when changes are made on the **Position Form (XP02.1)**. Some of the changes that should have a new effective date are: abolishments, under or multi-fills, grade/schedule changes, activations, and inactivations. Some of the changes that may have a new effective date are: process level, department, location, supervisor codes, and funding data,

Agency HR Initiators/Approvers in State Personnel Agencies may use the **Agency Position Maintenance Form (ZP02.1)** to change a portion, but not all, of the Position Code fields. Changes may include the supervisor code, supervisor link, user level, security, accounting, and location information. History on the Position will be overridden when the **Agency Position Maintenance Form (ZP02.1)** is used for changes. The effective date cannot be changed on this form.

Since HRIS is an integrated system, Position Codes are impacted by the information stored within Job Codes and Salary Schedules. Changes to these other data sets affect the Position Code and, in turn, the Employee. For example, all Positions in the same Job Code have the same Grade Range Schedule and Grade. Assume it is AREG, Grade 14, but through a reclassification moves to Grade 15 in the same Schedule. The new Grade will not automatically default to the Position(s) from the Job Code. The new Grade **MUST** be entered on the Position itself (as would the Schedule, if it were new, too).

As indicated in the Position Code Basics, there may be many Positions allocated to one Job Code (Job Codes are available in a drop down list on the Position form). Positions with different working titles (e.g., Sr. Groundskeeper, Tucson; Sprinkler System Specialist; Landscape Design Trainee) could all fall in the Job Code of Groundskeeper. Positions in the same Job Code should have equivalent levels of responsibility, difficulty and accountability, but may have different titles or functions. The ADOA Central Class and Compensation Administrators establish Job Codes for all State agencies (agencies do not have access to create Job Codes). But agencies may override other fields, such as expense account fields, which are required on the Position (see the Assigning Multiple Labor Distributions lesson).

Critical Points:

- Only the ADOA Central Class and Compensation Administrator and the Non-State Personnel Agency Specialist may establish, update and inactivate Position Codes, and change history in the system, using the XP02.
- State Personnel agencies use the ZP02 to change several Position fields but cannot modify the Effective Date, Status, Process Level, Schedule and Grade or Job Code.
- Positions may be inactivated temporarily (e.g., the Base Position must be inactivated when an Underfill Position is created).
- Positions may be permanently abolished (e.g., a FLSA status change would require another Position Code for the employee; the old Position should not be filled again).
- Positions may be future-dated.
- Positions always have an FTE of 1.0
- ADOA Central Class and Compensation Administrators create Job Codes, Schedules and Grades for all State Personnel and Non-State Personnel agencies.
- Job Code, Schedule and Grade information does not default to the Position. However, Position information defaults to the employee(s).
- Positions may have working titles which differ from the Job Code and from the titles of other Positions in the same Job Code.
- The Position Schedule and Grade **MUST** be the same as its Job Code Schedule and Grade.
- Employees are not allowed to be placed in Inactive Positions.
- Filled positions cannot be inactivated.
- The Employee's work Location appears on the HR11 as PAYROLL. However, the Position Location information on the XP02 and ZP02 is the actual work location and must be kept up to date.
- A position with a new Job code, new salary schedule and grade will need to have the new salary schedule established first, then the job code established second **BEFORE** the position can be established or updated.
- The drill down feature on the Position Location Code (XP02 and ZP02) provides access to employees in that Location, as well as to Location History

Position Form (XP02)

Add Position Code - Main Tab

The screenshot shows the 'Position (XP02.1)' form with the following fields and callouts:

- 1: Title bar 'Position (XP02.1)'
- 2: Company field
- 3: Position field
- 4: Effective date field
- 5: Effective date separator field
- 6: Update Emps,Reqs dropdown
- 7: Inquire button
- 8: Reason field
- 9: Status dropdown (set to 1)
- 10: Process Level field
- 11: Department field
- 12: User Level field
- 13: Job Code field
- 14: Location field
- 15: Tab bar (Main, Structure, Payroll)

Additional fields and text at the bottom of the form include:

- Active
- Addr1
- Addr2
- City,St,Zip
- County

User Fields

Totals

Base Currency

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	White Search Box	R	Type XP02 in the White Search Box. Press Enter on the Keyboard	The Position Form (XP02) will open	There are 3 pages on this form. Begin with the Main tab.
2	Company field	R	Type or Select '1'		All forms/actions must contain a 1 in the Company field
3	Position field	R	Enter the new Position Code	The Position Code will fill in, but the white box next to it will be blank. The Position Description (Working Title) should be entered in the blank box	For additional information on position code setup, see the HRIS Job Aid - Position Code Structure
4	Position field (Description)	R	Enter the Working Title of this Position		The Description box next to the Position Code box is not identified but needs to be filled in. You will need to know in advance what the Description (title) will be. Do NOT exceed 30 characters; the only punctuation allowed is a hyphen (-) or a slash (/)
5	Effective field – First Box	R	Type the date this Position is to be established		
6	Update Emp,Reqs field	O	Do Not change this field – HRIS will default 'N'.	'N' will automatically default into field	
7	Inquire Button	R	Click Inquire	"Position Code Does Not Exist" will appear in lower left corner	
8	Reason field	O	Type or select from the drop down menu the reason for the entry.		
9	Status field	R	Type or select from the drop down menu the status of the position.		Valid Values are: <ul style="list-style-type: none"> • '1' – Active • '2' – Temporary • '3' – Abolished • '4' – Proposed • '5' – Inactive Default value is '1' if no entry is made.
10	Process Level field	R	Type or select from the drop down menu the process level in which the position works.		
11	Department field	R	Type or select from the drop down menu the department in which the position works.		
12	User Level field	R	Type or select from the drop down		

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
			menu the User Level code for this position.		
13	Job Code field	R	Type or select from the drop down menu the job code associated with the position.		A position code can only be allocated to one job code, but a job code can be found on multiple, different position codes.
14	Location field	R	Type or select from the drop down menu the true location where this position works.	After the location is selected in the drop down menu, the address will appear in the Address fields on the form.	Notes <ul style="list-style-type: none"> The information keyed for location on the position will not default to the Employee's record because of implications on the Employee's taxes. Therefore to see the true location of an Employee, you must check the Position.
15	Structure field	R	Click on the Structure tab	The Structure page opens.	

Add Position Code - Structure Tab

Position (XP02.1) xp02

1 {
Company
Position
Effective -
Update Emps,Reqs

8 {
Main Structure Payroll

2 Direct Supervisor
3 Indirect Supervisor
4 Link to Supervisor
5
6 Work Schedule
Shift
7 Security Level,Location

User Fields

Totals

Base Currency

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	Company field Position field Effective field Update Emps, Reqs field	R R R R	No Action Required, these fields will default to the information previously entered.		All forms/actions must contain a 1 in the Company field.
2	Direct Supervisor field	R	Type or select from the drop down menu the supervisor code the position reports to.		
3	Indirect Supervisor field	N / A	Leave field BLANK.		Field is NOT being used.
4	Link to Supervisor field	O	Type or select from the drop down menu the supervisor code that corresponds to this position. This field will be blank if the position is not in a supervisory role.		
5	Work Schedule field	N / A	Leave field BLANK.		Work Schedule will be entered on the Employee.
6	Shift field	N / A	Leave field BLANK.		Shift will be entered on the Employee.
7	Security Level, Location field – Box 1	R	Type or select from the drop down menu the Security level for the position. Not all agencies use a security level. If your agency does not use security level, enter '9'. If security levels are being used, enter '1'.		

	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
	Security Level, Location field – Box 2	R	Type the security location for the position. Not all agencies use a security location. If you agency does not use a location, enter '9999999999'. If security locations are being used, enter the location.		Field is 10 alpha characters.
8	Payroll tab	R	Click on the Payroll tab	The Payroll page opens.	

Add Position Code - Payroll Tab

SOA Position (XP02.1)

>> **+** Add **✎** Change **-** Delete **◀** Previous **?** Inquire **▶** Next | **Inquire** ▼

11 **1** **Update Employees, Requisitions** **N** ▼

Company 1 STATE OF ARIZONA
Position SAD000001234 NEW POSITION TITLE
Effective 01/01/2015 -

Main **Structure** **Payroll**

2 **Annual Hours**
3 **Salary Class**
4 **Pay Frequency**
5 **Pay Rate**
6 **Exempt from Overtime**
7 **Pay Plan**
8 **Schedule, Grade, Step**
9 **Expense Account**
9 **Activity**
10 **Encumbrance Position**

12 **User Fields** **Totals** **Base Currency**

HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	Company field Position field Effective field Update Emps, Reqs field	R R R R	No Action Required, these fields will default to the information previously entered.		All forms/actions must contain a 1 in the Company field.
2	Annual Hours field	R	Type the annual hours worked by the position.		Annual hours should be 2080 for all position codes (except Military Affairs Firefighters, which should be 2990).
3	Salary Class field	R	Type or select from the drop down menu the salary class for the position.		Valid Values are: <ul style="list-style-type: none"> • H – Hourly – should be used for all employees except for Elected Officials and Judges • S – Salaried – should be used for ONLY Elected Officials and Judges
4	Pay Frequency field	R	Type or select from the drop down menu the pay frequency for the position.		Valid Values are: <ul style="list-style-type: none"> • 2 – Biweekly – all position codes should be set to biweekly.
5	Pay Rate field – Box 1 & 2	N / A	Pay Rate field should be left BLANK.		Pay Rate is assigned to the Employee.
6	Exempt from Overtime field	R	Type or select from the drop down menu whether or not the position is exempt from overtime.		Valid Values are: <ul style="list-style-type: none"> • BLANK – Not Applicable • N – No • Y – Yes
7	Pay Plan field	R	Type or select from the drop down menu the pay plan associated with the position.		For non-exempt position codes, select Overtime Plans (NEXP). For exempt position codes, select Payroll Schedules (EXC for positions ending in 'O', and EXP for positions ending in 'E').
8	Schedule,Grade, Step fields – Box 1, 2 & 3	R	Box 1 – Type or select the schedule associated with the job code and, therefore, the position. Box 2 – Type or select the grade associated with the position.		Schedule and Grade go hand in hand; one is meaningless without the other. Always think of them together.

	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
			Box 3 – There is no step associated with the position. Leave this field BLANK.		
9	Expense Account field – Box 1	R	Type or select from the drop down menu the Distribution Company.		Box 1 - Distribution Company - GL Company. Field is required.
	Expense Account field – Box 2	R	Type or select from the drop down menu the Accounting Unit.		Box 2 – Accounting Unit – field is tied to the GL Company; combination must be applicable or an error message will be received. Field is required.
	Expense Account fields – Box 3 & 4	R	Enter an Account and SubAccount number.		Box 3 & 4 – Account should be 6011 and SubAccount should be current fiscal year (FY).
10	Activity field – Box 1	R	Type or select from the drop down menu the Activity number.		Box 1 – Activity - If you are going to use an Account Category, you must input a value in this field.
	Activity field – Box 2	O	Type or select from the drop down menu the Account Category.		Box 2 – Account Category – If an Activity is entered; the Account Category field becomes required. For agencies that do not have an Account Category, use the default 'ZZZZZ'.  If Acct Unit AFund Attribute is filled in, it must match the GL Company provided. If not, message will appear "AFund Attribute does not match GL Company". <ul style="list-style-type: none"> • If Acct Unit AFund Attribute is blank, then system checks the Activity AFund Attribute. This Attribute must then match the GL Company. • If Accounting Unit AFund Attribute is blank, then an Activity Code must be provided.
11	Add button	R	Click Add to add the position to HRIS.	You should receive the message "Add Complete, verify user fields" in the lower left corner. When you see this message you must enter the User Fields, as they	

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
				are not on the new position.	
12	User Fields link	R	Click the User Fields link at the bottom of the page.	User Fields page opens.	See section User Fields Link (Page 27) for steps required to complete the position transaction. You must complete the steps in this section or the position will not be complete in HRIS.

Update Position Code - Main Tab

HRIS State of Arizona Position (XP02.1) Welcome Frank [logout] xp02

Home + Add Change Delete Previous Inquire Next Inquire

2 Company 1

3 Position SAD000001239 AD TRAINING OFFICER III

5 Effective 08/01/2008 -

6 Update Emps,Reqs N

14

Main Structure Payroll

7 Reason OTHER OTHER

8 Status 1 Active

9 Process Level ADHRD AD-HUMAN RESOURCES DIVISION

10 Department HR720 HRIS SERVICE CENTER

10 User Level ADHR720 HRIS SERVICE CENTER

11 Job Code AUN04866 TRAINING OFFICER III

12 Location PAYROLL ADOA MAIN PAYROLL

13 Addr1

Addr2

City,St,Zip

County

Done Local intranet

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	White Search Box	R	Type XP02 in the White Search Box. Press Enter on the Keyboard	The Position Form (XP02) will open	There are 3 pages on this form. Begin with the Main tab.
2	Company field	R	Type or Select '1'		All forms/actions must contain a '1' in the Company field
3	Position field	R	Enter the Position Code	The Position Code will fill in and the title will appear in the box next to the Code.	
4	Next button	R	Click Next to bring up the position information.	Current position information will appear in the fields.	
5	Effective field – First Box	R	Type the NEW Effective date (beginning date) for the position changes		
6	Update Emp,Reqs field	O	Do Not change this field – HRIS will default 'N'.	'N' will automatically default into field, and the employee will be updated later.	Action should be pending – NOT immediate.
7	Reason field	O	Type or select from the drop down menu the reason for the change.		The Position Reason Code MUST begin with AB-, or be DO NOT USE, INACTIVATE POSITION or LINK INACTIVATION if an Inactive Status of '5' is selected below,
8	Status field	R	Type or select from the drop down menu the new status, if it is changing.		For Status - Valid Values are: <ul style="list-style-type: none"> • '1' – Active • '2' – Temporary • '3' – Frozen • '4' – Proposed • '5' -- Inactive
9	Process Level field	R	Type or select from the drop down menu the new process level, if it is changing. If no changes, skip this step.		
10	Department field	R	Type or select from the drop down menu the new department, if it is changing. If no changes, skip this step.		
11	User Level field	R	Type or select from the drop down menu the new user level, if it is changing.		

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
			If no changes, skip this step.		
12	Job Code field	R	Type or select from the drop down menu the new job code, if it is changing. If no changes, skip this step.		
13	Location field <ul style="list-style-type: none"> ▪ Code ▪ Code Description ▪ Addr 1 ▪ Addr 2 ▪ City,St,Zip County 	R	Type or select from the drop down menu the new job code, if it is changing. If no changes, skip this step.	The Location Code will appear, as well as its description and the address itself. You may drill down on the Code to find employees in that Location, plus Location History.	 Notes <ul style="list-style-type: none"> • For Location - The information keyed for the Location field on the position record will <u>not</u> default to the Employee's record because of implications on the Employee's taxes (HR11 Location will be PAYROLL for all employees). Therefore, to see the true location of an Employee, you must check the Position Location.
14	Structure link	R	Click on the Structure link under Related Pages .	The Structure link opens.	

Update Position Code - Structure Tab

The screenshot shows the HRIS State of Arizona interface for updating a position code. The page title is "Position (XP02.1)". The user is logged in as "Welcome Frank". The search bar contains "xp02". The "Structure" tab is selected, and the "Update Emps,Reqs" dropdown is set to "N".

Callout 1 points to the "Add", "Change", "Delete", "Previous", "Inquire", "Next", and "Inquire" navigation buttons.

Callout 2 points to the "Main", "Structure", and "Payroll" tabs.

Callout 3 points to the "Direct Supervisor" field.

Callout 4 points to the "Indirect Supervisor" field.

Callout 5 points to the "Link to Supervisor" field.

Callout 6 points to the "Work Schedule" field.

Callout 7 points to the "Shift" dropdown menu.

Callout 8 points to the "Update Emps,Reqs" dropdown menu.

Form fields and values:

- Company: 1
- Position: SAD000001239
- Effective: 08/01/2008
- AD TRAINING OFFICER III
- Update Emps,Reqs: N
- Direct Supervisor: [Empty]
- Indirect Supervisor: [Empty]
- Link to Supervisor: [Empty]
- Work Schedule: [Empty]
- Shift: [Empty]
- Security Level,Location: [Empty]

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	Company field Position field Effective field Update Emps, Reqs field	R R R R	No Action Required, these fields will default to the information previously entered.		All forms/actions must contain a '1' in the Company Field.
2	Direct Supervisor field	R	Type or select from the drop down menu the new direct supervisor field. If no changes, skip this step.		
3	Indirect Supervisor field	N /A	Leave this field BLANK.		This field is not being used by the SOA.
4	Link to Supervisor field	O	Type or select from the drop down menu the new link to supervisor field. If no changes, skip this step.		This field is only used when the position has supervisory or management responsibilities. It is not used for 'lead' positions.
5	Work Schedule field	N /A	Leave this field BLANK.		This field is not being used. Work schedule is on the Employee's record.
6	Shift field	N /A	Leave this field BLANK.		This field is not being used. Shift is on the Employee's record.
7	Security Level, Location fields	R	Type or select from the drop down menu the new security level, security location fields. If no changes, skip this step.		Not all agencies use a security level & location. If your agency does not use security level, enter all '9's in both fields. If security level, location is being used, enter '1', then the location in box '2'.
8	Payroll tab	R	Click on the Payroll tab.	The Payroll page opens.	

Update Position Code - Payroll Tab

The screenshot shows the HRIS State of Arizona interface for updating a position code. The page title is "Position (XP02.1)" and the user is logged in as "Welcome Frank". The breadcrumb trail is "Home > xp02". The main navigation bar includes "Add", "Change", "Delete", "Previous", "Inquire", "Next", and "Inquire".

Callout 1 points to the "Company" field, which is set to "1". Callout 2 points to the "Annual Hours" field. Callout 3 points to the "Salary Class" dropdown menu. Callout 4 points to the "Pay Frequency" dropdown menu. Callout 5 points to the "Exempt from Overtime" dropdown menu. Callout 6 points to the "Pay Plan" dropdown menu. Callout 7 points to the "Pay Rate" field, which is currently "Not Applicable". Callout 8 points to the "Schedule, Grade, Step" field. Callout 9 points to the "Expense Account" and "Activity" fields. Callout 10 points to the "Position" field, which is set to "SAD000001239" and "AD TRAINING OFFICER III". Callout 11 points to the "User Fields" section at the bottom of the page.

10 Position (XP02.1)

1 Company 1

Position SAD000001239 AD TRAINING OFFICER III

Effective 08/01/2008 -

Update Emps,Reqs N

Main Structure Payroll

2 Annual Hours

3 Salary Class

4 Pay Frequency

5 Exempt from Overtime

6 Pay Plan

7 Not Applicable

8 Schedule, Grade, Step

9 Expense Account

Activity

11 User Fields Totals Base Curr

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	Company field Position field Effective field Update Emps, Reqs field	R R R R	No Action Required, these fields will default to the information previously entered.		All forms/actions must contain a 1 in the Company field.
2	Annual Hours field	R	Type or select from the drop down menu the NEW annual hours.		Annual hours should be 2080 for all position codes (except Military Affairs Firefighters, which should be 2990).
3	Salary Class field	R	Type or select from the drop down menu the NEW salary class.		For Salary Class - Valid Values are: <ul style="list-style-type: none"> • H – Hourly – should be used for all employees except for Elected Officials and Judges • S – Salaried – should be used for ONLY Elected Officials and Judges
4	Pay Frequency field	R	Insert a '2' in this field.		For Pay Frequency – Valid Values are: <ul style="list-style-type: none"> ▪ 2 – Biweekly. ALL position codes should be set to biweekly.
5	Pay Rate field	N/A	Leave this field BLANK.		The pay rate field is not used on the Position by the State of Arizona. Rate is assigned to the Employee.
6	Exempt from Overtime field	R	Type or select from the drop down menu the NEW exempt from overtime designation.		For Exempt from Overtime – Valid Values are: <ul style="list-style-type: none"> • BLANK – Not Applicable • N – No • Y – Yes
7	Pay Plan field	R	Type or select from the drop down menu the NEW pay plan.		For Pay Plans – <ul style="list-style-type: none"> • For non-exempt position codes, select Overtime Plans. • For exempt position codes, select Payroll Schedules.

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
8	Schedule, Grade, Step fields	R	Type or select from the drop down menu the NEW schedule and grade.		For Step – NEVER insert a step on the Position. A step should be entered on an Employee's record when the Employee is on a Step and Grade Range Schedule.
9	Expense Account fields Activity fields	R R	Type or select from the drop down menu the NEW value for all of the fields that are changing. If fields are not changing, no entry is necessary.		Expense Account - Box 1 - Distribution Company - GL Company. Field is required. Expense Account - Box 2 – Accounting Unit – field is tied to the GL Company, combination must be applicable or an error message will be received. Field is required. Expense Account - Box 3 & 4 – Account should be 6011 and SubAccount should be the current fiscal year (FY) Activity - Box 1 - If you are going to use an Account Category, you must input a value in this field. Activity – Box 2 – Account Category – If an Activity is entered then the Account Category field becomes required. For agencies that do not have an Account Category, use the default 'ZZZZZ'.  If Acct Unit AFund Attribute is filled in, it must match the GL Company provided. If not, message will appear "AFund Attribute does not match GL Company". <ul style="list-style-type: none"> • If Acct Unit AFund Attribute is blank, then system checks the Activity AFund Attribute. This Attribute must then match the GL Company. • If Accounting Unit AFund Attribute is blank, then an Activity

	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
					Code must be provided.
10	Add button	R	Click Add to save the modified position in HRIS.	You should receive the message "Add Complete, verify user fields" in the lower left corner.	When you see this message you must enter the User Fields, as they are not yet on the new position.
11	User Fields link	R	Click the User Fields link at the bottom of the page.	User Fields page opens.	See section User Fields Link (Page 27) for steps required to complete the position transaction. You must complete the steps in this section or the position will not be complete in HRIS.

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User Fields Link

Alphanumeric User Fields (HR15.2)

6

1 2 3 4 5

PROG PROJ SPT 2

Back Detach >> + Add Change - Delete ? Inquire Inquire

FC	Type	Field Name	Value	Description	Sts	Curr	Req
<input type="checkbox"/>	Date	A RECEIVED	<input type="text"/>			<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Alpha	AT WILL STATUS	HDD	DIRECT RPT TO HEA		<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Alpha	B RECLASS FROM	<input type="text"/>		I	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Alpha	C RECLASS TO	<input type="text"/>		I	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Alpha	CPS SPECIALIST	<input type="text"/>			<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Alpha	F FUNDED	YES	YES		<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Alpha	G LINKED TO POSITION	<input type="text"/>			<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Alpha	LAW ENFORCEMENT STAT	NOT L E	NON-LAW ENFORCEME		<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Alpha	MASS COMM	<input type="text"/>			<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Alpha	ORDINARY PENSION	1	ASRS PLAN		<input type="text"/>	<input type="checkbox"/>

Base Currency

Calculation Base Amount

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	FC field	O	Type 'A' or select 'Add' from the drop down menu next to the user field row you would like to Add.		
2	Type fields	O	Field will display what type of date is allowed (i.e. Date, Numeric, Alpha)		
3	Field Name fields	O	Fields display the name of the various user fields.		At Will Status is a new field added for Personnel Reform. This denotes if employee is a Covered, Uncovered or Political Appointee. Another field created for Personnel Reform is Law Enforcement, this field denotes if the employee is a Law Enforcement employee and if so, what type.
4	Value and Description field	O	Type or select from the drop down menu the value to add to the user field.		Values may not always be available using the drop down menu, in which case you would enter your own values
5	Curr field	N / A	Leave this field BLANK.		Field is not being used by the State of Arizona.
6	Add; Change button	R	Click Add or Change to save the changes on the current page.		
7	Back button	R	Click Back to return to XP02.	The XP02 form opens.	The position code should appear in alphanumeric order within the process level and department.

Inactive Position Code - Main Tab

HRIS State of Arizona Position (XP02.1) Welcome Frank [logout]

Search: xp02

Navigation: Add, Change, Delete, Previous, Inquire, Next

Fields:

- Company: 1
- Position: SAD000001239 (AD TRAINING OFFICER III)
- Effective: 08/01/2008
- Update Emps,Reqs: N
- Reason: OTHER
- Status: 1 (Active)
- Process Level: ADHRD (AD-HUMAN RESOURCES DIVISION)
- Department: HR720 (HRIS SERVICE CENTER)
- User Level: ADHR720 (HRIS SERVICE CENTER)
- Job Code: AUN04866 (TRAINING OFFICER III)
- Location: PAYROLL (ADOA MAIN PAYROLL)
- Addr1, Addr2, City,St,Zip, County

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	White Search Box	R	Type XP02 in the White Search Box. Press Enter on the Keyboard	The Position Form (XP02) will open	There are 3 pages on this form. Begin with the Main tab.
2	Company field	R	Type or Select '1'		All forms/actions must contain a '1' in the Company field
3	Position field	R	Enter the Position Code of the position to be inactivated.	The Position Code will fill in and the title will appear.	
4	Next button	R	Click Next to bring up the position information.		Current position information will appear in the fields.
5	Effective field – First Box	R	Type the NEW Effective date (beginning date) for the position changes (date position is becoming inactive)		 Notes <ul style="list-style-type: none"> Do Not enter a date in the box next to the Effective field (End Date) on the original position code. This will delete all history from the position. By adding a <u>new</u> beginning effective date for the inactive position code, HRIS is able to preserve history for the position code.
6	Update Emp,Reqs field	O	Do Not change this field – HRIS will default 'N'.	'N' will automatically default into field	
7	Reason field	R	Type or select from the drop down menu the reason for inactivating or abolishing the position.		The Position Reason Code MUST begin with "AB-" or be "INACTIVATE POSITION, "LINK INACTIVATION" or "DO NOT USE" when an Inactive Status of '5' or Abolished '3' is selected below,
8	Status field	R	Type '5' or '3' or select Inactive or Abolished from the drop down menu.	Abolished has end date, Inactive does not.	
9	Add button	R	Click Add to save the inactive position in HRIS.	You should receive the message "Add Complete, verify user fields" in the lower left corner.	 Notes <ul style="list-style-type: none"> NEVER put an "End Date" on the original position code and click

	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
					<p>Change. This will delete all the history from the position code. Delete should only be used to correct an error if history has not been built.</p> <ul style="list-style-type: none"> • Please be aware that if the position had been, or is currently, filled by an employee on the Effective date used in #5, the transaction will not process. A message at the lower left corner will read either, "Position can't be inactivated; it is filled through XX/XX/XX (date)" or "Position can't be inactivated; it is currently filled." • This step automatically places an End Date on the position in history and creates a current record with no end date.
10	End field - 2 nd box next to Effective field	R	If a position is being abolished from future use, type the actual End date for the position.		<p>An End date will signify the position is not to be used again, and will enable report writers to exclude vacant, inactive positions from reports, as they are no longer consider viable.</p> <p>NOTE: To find history on the position code, click the drop down arrow at the end of the Position field, scroll down to find the inactivated position, and drill down on the position code within the form (Position cannot be found in the Search/Find mode).</p>

Delete Position Code - Main Tab – POSITION CREATED IN ERROR

HRIS State of Arizona

Position (XP02.1)

Welcome Frank [logout]

xp02

Home

» + Add Change - Delete < Previous ? Inquire > Next | Inquire ▾

2 Company 1

3 Position SAD000001239

4 STATE OF ARIZONA

POSITION CREATED IN ERROR

Effective 06/16/2007 -

Update Emps,Reqs N

Main Structure Payroll

Reason FYE LD FYE LABOR DISTRIBUTION UPDATE

Status 1 Active

Process Level ADHRD AD-HUMAN RESOURCES DIVISION

Department HR720 HRIS SERVICE CENTER

User Level ADHR720 HRIS SERVICE CENTER

Job Code ALIN04866 TRAINING OFFICER III

Location ADMAPH0010

Addr1 100 N 15TH AVE

Addr2 STE 261

City,St,Zip PHOENIX AZ 85007

County MARICOPA

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	White Search Box	R	Type XP02 in the White Search Box. Press Enter on the Keyboard	The Position Form (XP02) will open	There are 3 pages on this form. Begin with the Main tab.
2	Company field	R	Type or Select '1'		All forms/actions must contain a '1' in the Company Field
3	Position field	R	Enter the Position Code of the position to be deleted.	The Position Code will fill in and the title will appear.	
4	Next button	R	Click Next to bring up the position information.		Current position information will appear in the fields.
5	Delete button	R	Click Delete to remove the position from HRIS.	You should receive the message "Press OK to process" in a separate box. When you click OK, a message in the lower left corner will read, "Records Have Been Deleted."	Notes <ul style="list-style-type: none"> • Entry of this Delete feature will delete ALL history associated with the position code. Deletes should ONLY be used to correct an error if history has not been built on the position. Before deletion, drill around on the position to ensure no history exists.

Agency Position Maintenance Form (ZP02)

Update Position Fields – Main tab

Agency Position Maintenance (ZP02.1)

6

2 Company

3 Process Level AD-HUMAN RESOURCES DIVISION

4 Position

5 Effective -

16 Update Employees, Requisitions

7	Reason	<input type="text" value="FYE LD"/>	FYE LABOR DISTRIBUTION UPDATE
8	Status	1	Active
9	At Will Status	UN	UNCOVERED
10	Exempt from Overtime	Y	
11	Pay Plan	EXC	EXCLUDED
12	Schedule, Grade, Step	AREG 24	A REGULAR SCHEDULE
13	Law Enforcement	NOT L E	NON-LAW ENFORCEMENT
14	Department	HR710	HRIS STAFF
15	Job Code	AUN04970	AD SR BUS SPCT

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	White Search Box	R	Type ZP02 in the White Search Box. Press Enter on the Keyboard	The Agency Position Maintenance Form (ZP02) will open	There is one page on this form, the Main tab.
2	Company field	R	Type or Select '1'		All forms/actions must contain a 1 in the Company field
3	Position field	R	Type or select from the drop down menu the Position Code	The Position Code will fill in and the position title will appear.	For additional information on position code setup, see the HRIS Job Aid - Position Code Structure. If using the drop down menu, you will see all position codes displayed, but you will only be able to select, view and change the position codes associated with the Process Level from step 3. In addition, you will only see the positions in which your security is allowed.
4	Effective field – First Box	N / A	This field cannot be changed on the ZP02.		Because the effective date of the Position remains the same, any field changes will appear as if they occurred on the original effective date.
5	Update Emp, Reqs field	O	Select the value that indicates when you would like to update employee and requisition records to reflect changes you are making to the position.		If you select Update Emps, Reqs Immediately, updates will be made to the employee, requisition and new hire actions immediately. If you select Update Emps, Reqs Later, or if the update is incomplete, you will need to run a PA102 (Position Update) when you are ready to update records with these changes. If you are making currency or process level changes, you must select Update Emps, Reqs later.

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
					Valid Values are: N = Update Emps, Reqs Later Y = Update Emps, Reqs Immediately The default value is N.
6	Inquire or Next Buttons	R	Click Inquire if the effective date is populated. Click Next if the effective date is unknown – this will bring up the most recent record.	“Inquiry complete” will appear in the lower left corner.	If you select a position code that does not match the process level, you will see the message “Record does not exist” in the lower left corner when you click Next or Inquire .
7	Reason field	O	Type or select from the drop down menu the reason for the change.	The Reason Code will fill in.	
8	Status field	N / A	Field displays the position status. No action is necessary.		Status field cannot be changed on this form. Display only.
9	At Will Status field	N / A	Field displays the At Will Status. No action is necessary.		Status field cannot be changed on this form. Display only. Valid Values are: <ul style="list-style-type: none"> • AG = Attorney General • CV = Covered • DR = Direct report to the Head of an Organizational Unit • GV = Governor Office • HD = Head of an Organizational Unit • NV = Investment Positions • Un = Uncovered
10	Exempt from Overtime field	N / A	Field displays the if the position is Exempt from Overtime. No action is necessary.		Status field cannot be changed on this form. Display only. Valid Values are:

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
11	Pay Plan field	N / A	Field displays the Pay Plan. No action is necessary.		<p>Status field cannot be changed on this form. Display only.</p> <p>Valid Values are:</p> <ul style="list-style-type: none"> • Excluded • Exempt • Non Exempt
12	Schedule, Grade, Step field	N / A	Field displays the Schedule, Grade and Step. No action is necessary.		<p>Status field cannot be changed on this form. Display only.</p> <p>Valid Values are:</p>
13	Law Enforcement field	N / A	Field displays the Law Enforcement. No action is necessary.		<p>Status field cannot be changed on this form. Display only.</p> <p>Valid Values are:.</p>
14	Department field	N / A	Field displays the Department. No action is necessary.		<p>Status field cannot be changed on this form. Display only.</p> <p>Valid Values are:</p>
15	Job Code field	N / A	Field displays the Job Code. No action is necessary..		<p>Status field cannot be changed on this form. Display only.</p> <p>Valid Values are:</p>
16	Structure Tab	N / A	Click on Structure Tab to view more information		

Agency Position Maintenance (ZP02.1)

Change Delete Previous Inquire Next Inquire

Company 1 STATE OF ARIZONA
Process Level ADHRD AD-HUMAN RESOURCES DIVISION
Position SAD000001239 AD SR BUSINESS SPECIALIST
Effective 06/13/2009 -
Update Employee Requisitions N

Main Structure Payroll

3 Direct Supervisor ADHRD60070 LAUER, JODY A.
4 Co-Supervisor ADHRD70042 AD SR BUSINESS SPECIALIST
Security Level Location 9999999999
5 User Level ADHR710 HRIS STAFF
6 Location ADMAPHO010
Addr1 100 N 15TH AVE
Addr2 STE 261
City,St,Zip PHOENIX AZ 85007
County MARICOPA

1	Direct Supervisor field	O	Select a supervisor code that identifies the position's direct supervisor.		
2	Indirect Supervisor field	O	Do not use		
3	Link to Supervisor field	O	If this is a supervisor position, select the supervisor code that corresponds to the position. If this is not a supervisor position, leave this field blank.		
4	Work schedule field	O	Select the work schedule for this position.		
5	Shift field	O	Select the shift that this position works.		Valid Values are: 1 = Shift One 2 = Shift Two 3 = Shift Three 4 = Shift Four 5 = Shift Five 6 = Shift Six 7 = Shift Seven 8 = Shift Eight 9 = Shift Nine
6	Security Level Location field	O	Type an number between 1 and 9 to indicate the security level for this position. Not all agencies use Security Level Locations.		Valid Values are: 1 – 9
7	Structure		Click on the Structure tab		
11	User Level field	O	Select a user level for this position.		
13	Location field	R	Type or select from the drop down menu the updated NEW location of where this position works. If field is not changing, skip this step.	After the location is selected in the drop down menu, the address will appear in the Address fields on the form.	 Notes <ul style="list-style-type: none"> The information keyed for location on the position will <u>not</u> default to the Employee's record because of implications on the Employee's taxes (HR11 Location will be PAYROLL for all employees). Therefore, to see the true location of an Employee, you must check the Position Location.

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Agency Position Maintenance (ZP02.1)

10

Change Delete Previous Inquire Next Inquire

Company 1 STATE OF ARIZONA
 Process Level ADHRD AD-HUMAN RESOURCES DIVISION
 Position SAD000001239 AD SR BUSINESS SPECIALIST
 Effective 06/13/2009 -

Update Employees, Requisitions N

Main Structure Payroll

1
 2
 3 Annual Hours 2080
 4 Salary Class Hourly
 5 Pay Frequency Biweekly
 6 Expense Account AD 18900 6011 2013 REGULAR BASE
 7 Activity AD 18900 ZZZZZ HRIS OPERATING
 8
 9

1	Annual Hours field	O	Type the number of annual hours for the position		
2	Salary Class field	O	Select a salary class for this position.		Valid values: H = Hourly S = Salary
3	Pay Frequency field	O	Select the pay frequency for this position.		Valid values: 1 = Weekly 2 = Biweekly
4	Pay Rate field	O	Type the pay rate for this position. Be sure the pay rate is consistent with the salary class (hourly or salaried).		If the position has a step and grade schedule, leave this field blank.
8	Expense Account field – Box 1	R	Type or select from the drop down menu the Distribution Company.		Box 1 - Distribution Company - GL Company. Field is required.
	Expense Account field – Box 2	R	Type or select from the drop down menu the Accounting Unit.		Box 2 – Accounting Unit – field is tied to the GL Company, combination must be applicable or an error message will be received. Field is required.
	Expense Account fields – Box 3 & 4	R	Enter an account or sub account number		Box 3 & 4 – Account should be 6011 and SubAccount should be the current fiscal year (FY).
9	Activity field – Box 1	R	Type or select from the drop down menu the Activity number.		Box 1 – Activity - If you are going to use an Account Category, you must input a value in this field.

	Activity field – Box 2	O	Type or select from the drop down menu the Account Category.		<p>Box 2 – Account Category – If an Activity is entered then the Account Category field becomes required. For agencies that do not have an Account Category, use the default 'ZZZZZ'.</p> <p> If Acct Unit AFund Attribute is filled in, it must match the GL Company provided. If not, message will appear "AFund Attribute does not match GL Company".</p> <ul style="list-style-type: none"> • If Acct Unit AFund Attribute is blank, then system checks the Activity AFund Attribute. This Attribute must then match the GL Company. • If Accounting Unit AFund Attribute is blank, then an Activity Code must be provided.
	Security Level, Location field – Box 2	R	<p>Type the security location for the position.</p> <p>Not all agencies use a security location. If you agency does not use a location, enter '9999999999'. If security locations are being used, enter the location.</p>		Field is 10 alpha characters.
10	Change button	R	Click Change to save the updates to the position.	See 'Change Complete – Continue' in the lower left corner.	