

McMaster Position Management Guidelines

Introduction

The University is committed to the provision of accurate staffing and position information. These guidelines provide a framework to University to effectively create, maintain and manage position and staffing information. The single source of data for position and staffing information is the PeopleSoft Mosaic HR system and all changes to this information must be updated within this source.

These guidelines include flexibility that allows for the creation, and modification of positions for effective workforce planning and reporting and related budget forecasting and planning. These guidelines provide background information on position management; instructions on how to update existing positions, how to create new positions; and scenarios for various HR transactions that could impact position management.

To maintain accurate workforce information, it is suggested that department managers:

- Quarterly review position and job information as part of the ongoing workforce discussions to ensure data remains accurate and reflects known arrangements; and
- Annually review their staffing profile and related position information in line with the development of the forthcoming budget period.

Human Resources will provide assistance to key stakeholders, including Managers, Department Heads, and Deans to support quality data outcomes.

What is position management?

- **Position Management:** is a technical concept within the PeopleSoft Mosaic HR module which separates a 'position' from a 'job' and a 'person' (incumbent) in a 'job'. Position management is used to define a role within an organization structure, and determine the associated attributes of that role, such as job title, job code, salary band, reporting relationships, security access etc.

Why is it important? What are the advantages?

- Provides the ability to manage the University's workforce by position, in addition to employees occupying those positions.
- Streamlines processes for recruiting and hiring Faculty and Staff.
- Fully integrated with McMaster's PeopleSoft Mosaic HR and Oracle Hyperion budget systems
- Provides organizational reporting structure by position, which can then be linked to employees occupying those positions
- Improved employee life cycle reporting, turnover analysis & recruitment metrics

Definitions

- **Employee:** an employee is an active status, unique employee record as at a date in time. An employee may actively occupy more than one unique position. Position attributes are associated with each employee

- **Job code:** a job is a collection of related tasks and responsibilities that are grouped together for the purpose of accomplishing work within the University. A job has specific characteristics
- **Position:** a position is a specific occurrence of a job within an organization, or one “chair”. The position is linked to the job and inherits all the characteristic of the job.
- **Frozen Position:** a position is frozen in certain circumstances because it is temporarily not required but is planned to be utilised at a future point in time.
- **Inactive Position:** a position is deemed inactive when it is no longer required by the University
- **Position Profile:** refers to the information recorded in the PeopleSoft Mosaic HR system which relates to a position and its attributes.
- **Occupancy:** refers to the job information recorded in the PeopleSoft Mosaic HR system which relates to an individual staff member in a position.
- **Position Attributes:** attributes associated with an employee’s position. These include (and are not limited to), part-time/full-time status, job code, job title, temporary/regular status, union code (employee groups). *Refer to chart PMO.1*
 - Mosaic HR Security & Department Budget Information is also tied to position attributes
- **Employee Specific attributes:** attributes associated with an employee and empl record. These include (and are not limited to) employee class, compensation rate, and union seniority date (if applicable). *Refer to chart PMO.1*

	Job Specific Attributes		Position Specific Attributes		Employee Specific Attributes
Job Code Attributes	Job Code	→	Job Code	→	Job Code
	Job Title	→	Position Title	→	Position Title
	Job Family				
	Union Code (Compensation Group)	→	Union Code (Compensation Group)	→	Union Code (Compensation Group)
	Standard Hours	→	Standard Hours	→	Standard Hours
Position Attributes	Grade	→	Grade	→	Grade
			Position Number	→	Position Number
			Regular/Temporary	→	Regular/Temporary
			Full/Part-Time	→	Full/Part-Time
			Department	→	Department
			Location	→	Location
			Reports To	→	Reports To
			Supervisor Level	→	Supervisor Level
			Combo Code (Earnings & Benefits)	→	Combo Code (Earnings & Benefits)
Job Data Attributes			Mosaic HR Security	→	Mosaic HR Security
			Mosaic Finance Security	→	Mosaic Finance Security
					Expected End Date
					Expected Return date (when on leave status)
					Employee Class (Continuing, Limited Term, etc..)
					Union Seniority Date
				Probationary Date	
				Compensation Rate	

PMO.1

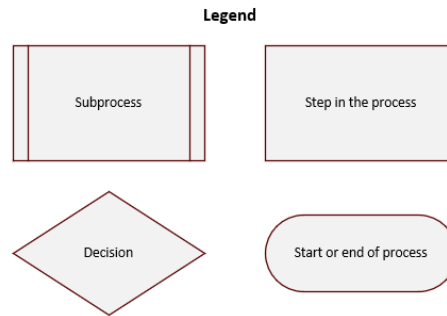
McMaster types of Position Management

- **One-to-one position** is defined as a position that has a maximum headcount of one, where the position is unique to the incumbent. This is used when the attributes are unique for the role.
- **One-to-many position** is defined as a position number that has a maximum headcount greater than one, where the same position number can be assigned to multiple incumbents. This option is suitable when the attributes are consistent for multiple incumbents.

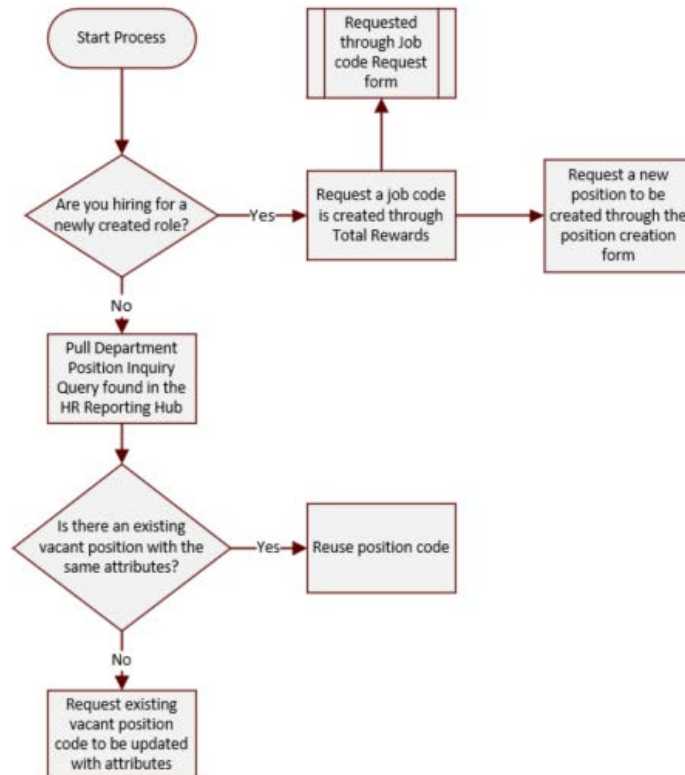
- **Over-encumbered position** is defined as a position that indicates there is more than one incumbent assigned to a position. This will occur when an employee goes on a personal or parental leave, career growth, or TMG Limited Term Secondment and a backfill is hired to assume his or her duties for the period of the leave.

Scenarios

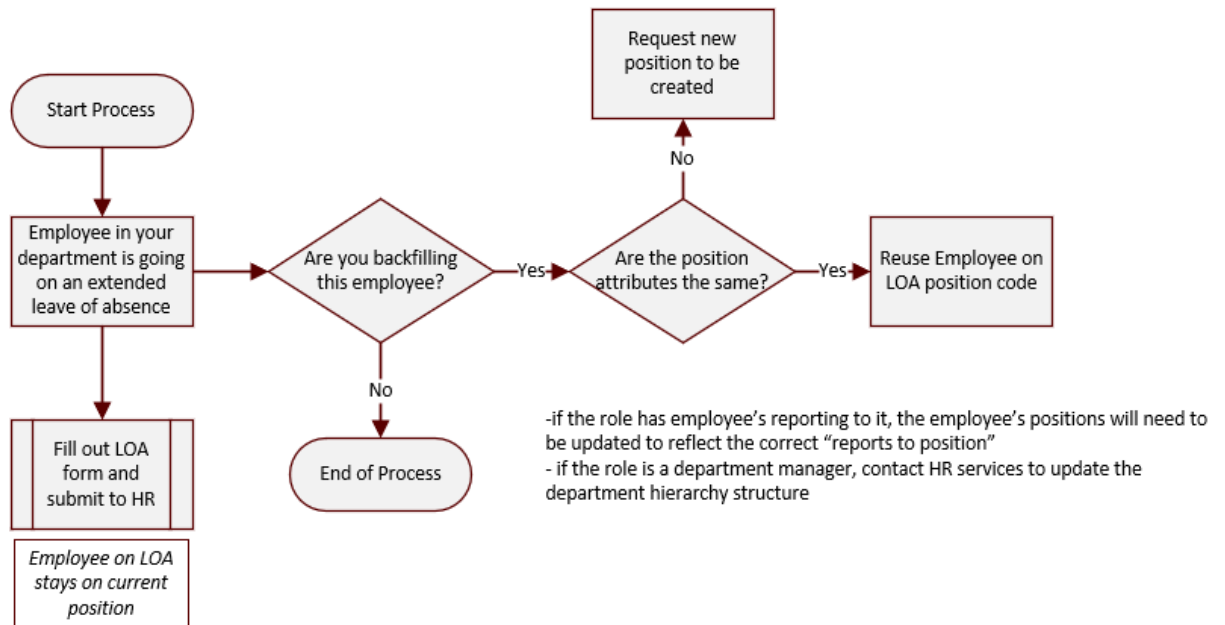
The examples below describe scenarios for various HR transactions which could impact position management.



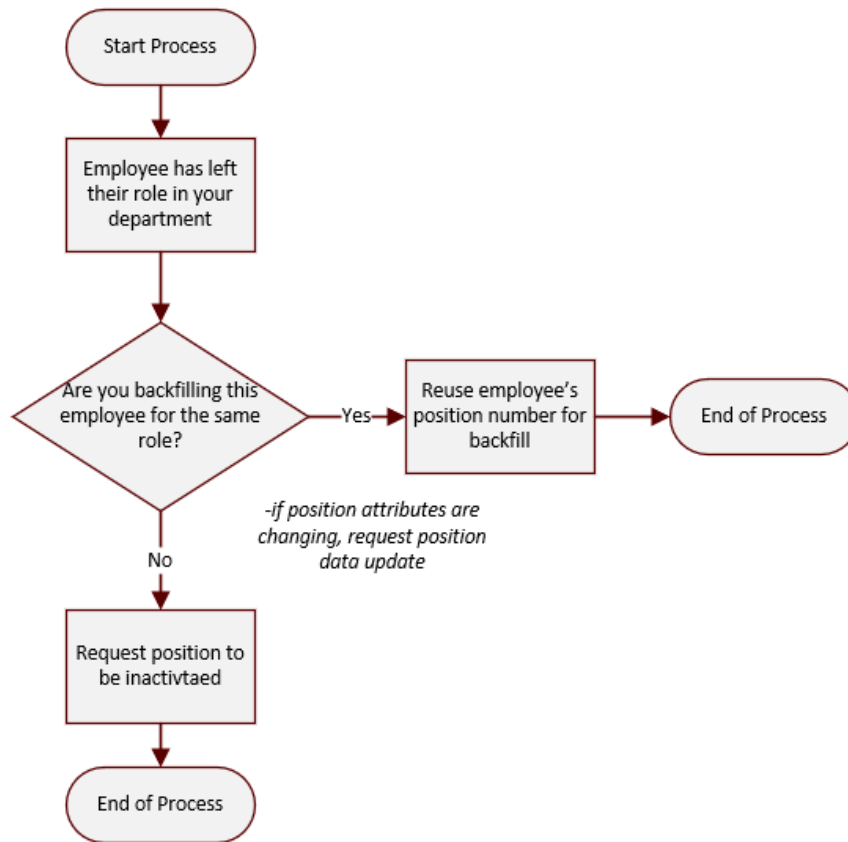
- Recruitment Process



- Employee in department is commencing an extended leave of absence (example: parental leave, personal leave, or career growth opportunity). Note: **departments own their position numbers.** **If an employee moves to another department, the position number stays within the original department.**



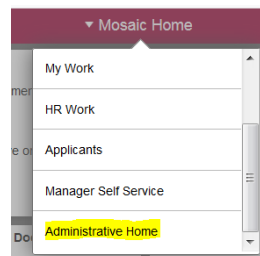
- Employee has permanently left their role in your department (due to a termination or transfer to another department)



Reporting

- For access to additional tools that can aid in the review of positions with your department, navigate to the HR Report Hub:

- Click on the home button in mosaic in the top right corner of the screen
- Click the drop down in the center and select Administrative Home



- Click on the HR Reporting Hub tile



○ Run one of the following reports:

Report Name	Report Description and Parameters	HR Reporting Hub Section	Timing	Alternate Path
Employee Position Information	<ul style="list-style-type: none"> Provides a listing of all active employees within the faculty/area which you have access to pull. Shows all position attributes including appointment level department budget table (DBT) override, and position level DBT set up. Enter the current fiscal year into the prompt to retrieve the most up-to-date DBT information. NOTE: information is retrieved from the data warehouse. Thus, if updates are made to the DBT or an employee, you will see these changes on the report on the next business day. 	Position Management	Can be run any time	
Position Attributes	<ul style="list-style-type: none"> Provides a listing of active positions with incumbents (headcount =>1) within the faculty/area which you have access to pull. Shows all position attributes including position level DBT set up. Enter the current fiscal year into the prompt to retrieve the most up-to-date DBT information. NOTE: information is retrieved from the data warehouse. Thus, if updates are made to the DBT or an employee, you will see these changes on the report on the next business day. 	Position Management	Can be run any time	
Vacant Position Attributes	<ul style="list-style-type: none"> Provides a listing of active positions which are vacant (headcount=0) within the faculty/area which you have access to pull. 	Position Management	Can be run any time	
HR Position Security	<ul style="list-style-type: none"> Provides a listing of all positions which have a HR Security profile attached within the faculty/area which you have access to pull. NOTE: information is retrieved from the data warehouse. Thus, if updates are made to an employee or their position security, you will see these changes on the report on the next business day. 	Position Management	Can be run any time	
Finance Security Validation	<ul style="list-style-type: none"> Pulls a listing of finance security roles (8) that we are asking you to validate for each employee by their home department 	Position Management	Can be run any time	
Department Employee Info	<ul style="list-style-type: none"> Provides position/job based information for employees in your department. Some fields included: <ul style="list-style-type: none"> - Position, Job Code, Job Title, Status (Active/Leave, etc.), Expected End Date, Expected Return Date, Standard Hours Report is based on employees as of the day the report is run 	Job & Employee Info	Report can be run as many times as needed and can be run at any time throughout the day	<i>Main Menu > Manager Self Service > Job and Personal Information > Reports > Department Employee Info</i>

Department Position Inquiry	<ul style="list-style-type: none"> Provides information on positions within a department with Job Family and department prompt, and includes current incumbent information Primarily developed to assist Department Administrators determine position numbers for creating Job Openings 	Recruitment Info	Report can be run as many times as needed and can be run at any time throughout the day	<i>Main Menu > Recruiting > Reports > Recruitment Queries > Department Position Query</i>
Review salary Combo Code by Dept	<p>Large-scale review of Department-wide funding setup</p> <ul style="list-style-type: none"> Specify Fiscal Year; Option to select single Department Show all current Salary Distribution for Position Level and Appointment Level for the Department(s) you have Row Level security to view in HR <ul style="list-style-type: none"> Position Level funding is indicated by lines with Position field populated Appointment (or EE) Level funding is indicated by lines with Empl_ID field populated <p>NOTE: when the combo showing is the same for both Salary and Benefit for the same Position or Empl_ID, then there is no override set up for Fringe for that entry, and the Salary to Benefit GL Mapping table will be used in creating Pay to GL records</p>	Budget Mgmt-Dept Budg Tbl	Can be run at any time; shows current results	<i>Main Menu > Human Resources > Set Up HCM > Product Related > Commitment Accounting > Budget Information > DBT Department Queries > All Active Earns Combo Setup</i>
Latest Combo Specified Posn	<p>Quick (targeted) search for single Position level funding (position number)</p> <ul style="list-style-type: none"> Specify position number Shows current Salary, Fringe, and Taxes GL Combo setup for the Position funding for each Department + position number combination <p>NOTE: shows both Effective Date and Date Entered, to enhance understanding of when each funding record would have begun to be reflected in GL and Labour Distribution</p>	Budget Mgmt-Dept Budg Tbl	Can be run at any time	<i>Main Menu > Human Resources > Set Up HCM > Product Related > Commitment Accounting > Budget Information > DBT Department Queries > Current Position Level - by Position</i>