State of Wisconsin

Department of Administration

Maintain Position Data

(Mass Updates)

Purpose

To update a position, either vacant or filled, within PeopleSoft, a Position Update Request Form must be completed by the Agency Position Management Specialist (AGENCY_BUDGET role), and, in some cases, approved by the agency and/or the State Budget Office.

This job aid provides direction on how to create mass position update requests for existing positions in PeopleSoft, an overview on the approvals needed, and other employees you should notify when making updates.

Contents

Notes Regarding Mass Position Updates

This process has been designed to submit mass position requests, using the approval workflow

- Allows for mass updates to positions and position budgets without requiring a workbook from STAR
- Works the same as single-position updates
- Allows for transactions that are approved by
  - HR Agency
  - HR/Budget Agency
  - Agency/SBO Budget

As of the creation of this document, mass position does now allow for updates after the initial requestor submits the update. Be sure HR/Budget departments and combo codes are properly reflected when the request is submitted.

Field Updated	HR Agency Only	HR/Bdgt Agency Only	Agency/SBO Budget
HR Department		X	X
Job Code		X	X
Location Code	X	X	X
Reports To Position Number	X	X	X
Regular/Temporary* *Used LEG & COURTS only*		X	X
Distrb %		X	X
Fund Code			X
Appropriations			X
CF Department		X	X
Account		X	X
Program Code		X	X
Operating Unit		X	X
Product		X	X
PC Business Unit		X	X
Project		X	X
Activity		X	X
Source Type		X	X
Category		X	X
Subcategory		X	X

Where to Find Mass Position in HCM

Navigation:

Mass position is attached to the same page used for the single-position form as shown below.

Main Menu > State of Wisconsin (STAR) > Human Resources > Process > WI Position Requests > WI Position Request Home

This functionality can also be found on the Workforce Administrator tile under Position & Tile Maintenance as well:

Creating Mass Position Update Requests – Search for Positions

Click **New Mass Request** if accessing from the single-position page.

If navigating to the WI Mass Position Request Home from the Position & Task Maintenance tile, the page will appear as shown below.

In order to begin a mass position update, the following fields are required when initiating a search:

- Load EFFDT
- Request Type
- One item from the list of fields available for search is also required

- Enter the effective date of the change using the magnifying glass behind **Load EFFDT**
- Select the **Request Type**
  - Dependent on what changes are being made

- Determines what the approval workflow will be

Field Updated	HR Agency Only	HR/Bdgt Agency Only	Agency/SBO Budget
HR Department		X	X
Job Code		X	X
Location Code	X	X	X
Reports To Position Number	X	X	X
Regular/Temporary* *Used LEG & COURTS only		X	X
Distrb %		X	X
Fund Code			X
Appropriations			X
CF Department		X	X
Account		X	X
Program Code		X	X
Operating Unit		X	X
Product		X	X
PC Business Unit		X	X
Project		X	X
Activity		X	X
Source Type		X	X
Category		X	X
Subcategory		X	X

- Use the available search fields to help narrow down your returned values
- Click **Search**

- Once you have the positions you need for your mass update, click **Save**

Additional items of note:

- Be sure to select the correct **Request Type**. The fields will open in the request based on the Request Type chosen. Once the request is Saved, the **Request Type** cannot be updated.

- Be sure to review the list to ensure all necessary positions are displayed. Positions cannot be added once the request is Saved.

  - *The form does allow additional rows to be added to split funding, as needed.*

- A new search will replace the existing search results.

- You can use a broader search and remove positions you do not want to update.

  - You may uncheck or delete rows to process, so additional lines are not an issue →

- Click **OK**

Creating Mass Position Update Requests – Using Find and Replace

7 Field Name [⌄]

Find Value [🔍]

Replacement Value [🔍]

- Use the **Field Name** dropdown to apply your mass update(s)
  - **Find Value** finds the old value in the displayed positions that you want to change
  - **Replacement Value** is the new value you want to replace the **Find Value** with
  - Updates can also be completed manually by entering the data directly in the field

  UPD is the default reason; this is not a valid value for submission. If you do not update the field to reflect the type of update you are making before clicking Submit, the system displays an invalid value pop-up error and will not allow you to submit until this field is changed.

8 Replace

- Click **Replace** to apply your update
  - A pop-up displays the number of replacements made:

    4 Replacements were made. (21012,12)

    OK

Repeat #7 & 8 until you have applied all your requested changes

Load EFFDT 06/15/2025 🔍   Search   **9**

Request Type Agency/SBO Budget ⌄   Clear Search

Creating Mass Position Update Requests – Split Funding

This functionality allows for split funding. Use the buttons at the end of the screen to add rows for split funding.

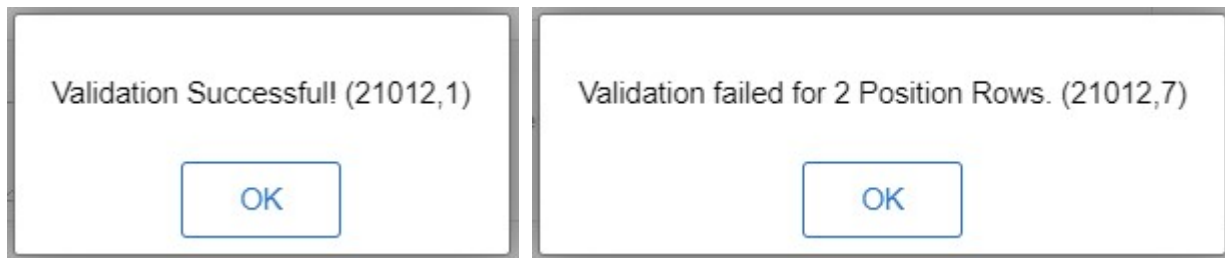Once the row is added and duplicated, update the distribution % and chartfield.

Be sure distribution %s add up to 100%. The following error message will appear if this part of the validation fails.
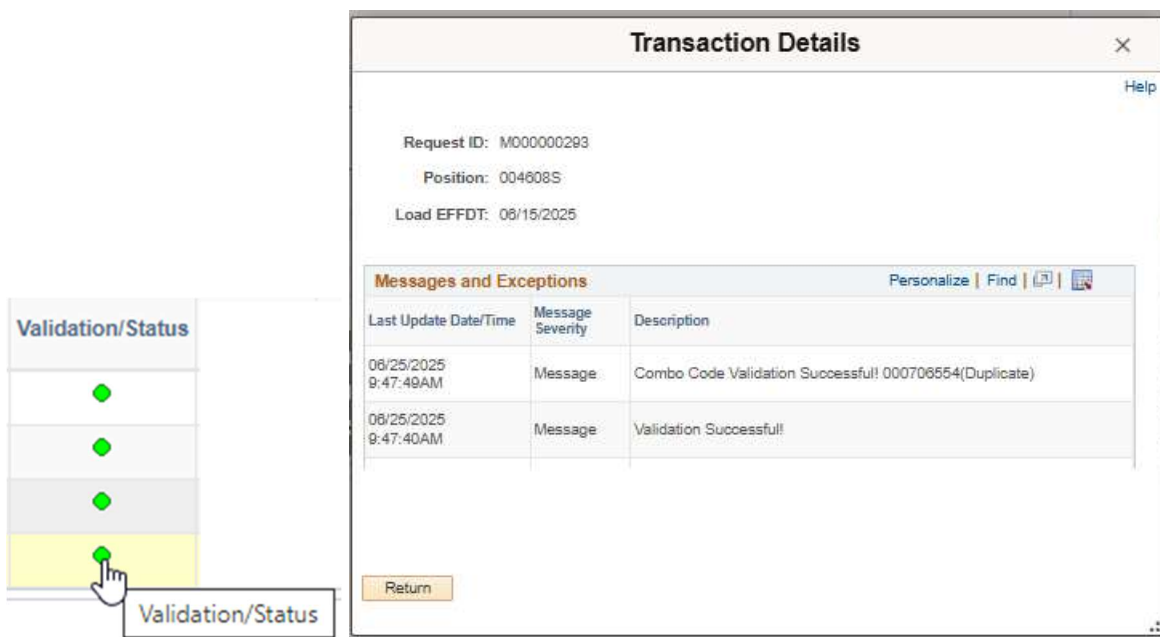

Additionally, to remove split funding, simply use the '-' button to remove any excess rows that aren't needed and update the funding and distribution % to 100%.

Creating Mass Position Update Requests – Validating/Fixing Data Errors

- Once you have applied your mass update(s), click **Validate** to check the logic
  - Logic checks for any open requests already pending
  - Logic validates **Load EFFDT** against existing Position and Job rows
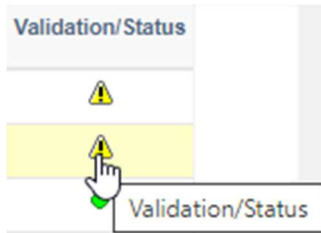 - A pop-up will display results (either all success or with errors):

Validation Successful! (21012,1)

OK

Validation failed for 2 Position Rows. (21012,7)

OK

- **Validation/Status** column
  - will display the "green light" for success; click for more details:

Transaction Details   ×

Help

Request ID: M000000293

Position: 004608S

Load EFFDT: 06/15/2025

Messages and Exceptions   Personalize | Find | 回 | 圃

Last Update Date/Time	Message Severity	Description
06/25/2025 9:47:49AM	Message	Combo Code Validation Successful! 000706554(Duplicate)
06/25/2025 9:47:40AM	Message	Validation Successful!

Return

Validation/Status

Validation/Status

  - will display "warning" for errors; click for more details:

Messages and Exceptions   Personalize | Find | 回 | 圃

Last Update Date/Time	Message Severity	Description
12/01/2022 11:05:48AM	Error	Invalid effective date, a Position data row exists with effective date 2022-10-09.
12/01/2022 11:05:48AM	Error	Invalid effective date, a Job data row exists with effective date 2022-10-09.

Return

Validation/Status

Validation/Status

- o These warnings can be resolved by selecting a later **Load EFFDT**, if possible, than the date indicated in the error message(s). Once you update the **Load EFFDT** you can re-validate, and the "warning" should flip to a "green light". If not, it will produce a new error message row to help you troubleshoot.
- o If a position is currently being updated in a single position request or another mass position request, the validation will fail on that position. The existing request will either have to be cancelled or completed to continue updating the current position request.

- o Warnings for invalid combo codes or invalid budget information will need to be corrected by contacting HR Budget or SBO to confirm the correct funding stream.

NOTE: The Validate button creates a message every time you click it. Additionally, any time data is updated, the validation must be done to ensure no errors exist

- • Enter a **Comment**. This field is required, just like in the single position request.
  - • If you do not enter a comment, you will receive a pop-up message:

- Click **Submit**
  - Once submitted, the workflow will appear as shown. The workflow for mass updates are the same as single updates.

At any time during this process, if it is decided that the request is invalid or no longer needed, you may click the **Cancel Request** button.

This process no longer requires the user to run an update to push these changes to position and job data. Once the final approval is completed, updates will be completed and pushed to the position and job data.