



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.

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Notes Regarding Mass Position Updates

This page has been designed to submit position requests in mass, using approved workflow

- Allows for mass updates to positions without requiring a workbook
- Works the same as single position updates
- Allows for transactions that are only approved by HR Agency or HR/Budget Agency ONLY

| | HR Agency | HR/Budget Agency |
|--------------------|-----------|------------------|
| Department | | X |
| Job Code | | X |
| Location | X | X |
| Regular/Temporary* | | X |
| Reports To | X | X |

*Used by LEG & COURTS only



A Job Code change requires notification to both the HR Specialist and Payroll & Benefits Specialist to review FLSA Status and make Absence Eligibility Group changes and Entitlement changes as needed



*This page currently allows for changes that **DO NOT** affect budgets tied to positions. If those types of changes are needed, the single position update form should be used. Instructions can be found in the Maintain Position Data – Single Update Job Aid.*

Creating Mass Position Update Requests

Navigation:

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

The screenshot shows the 'WI Position Request' home page. It features a sidebar with buttons for 'Create New Position', 'Copy Existing Position', 'Create Surplus Position', 'Update Existing Position', and 'Update Existing Request'. There are search fields for 'Position Number' and 'Request ID'. The 'New Mass Request' button is highlighted with a red box.

Click **New Mass Request**

The screenshot shows the 'Mass Position Update' search form. It includes a 'Search' section with the following fields: 'Business Unit', 'Department', 'Position', 'Job Code', 'Location Code', 'Position Type', 'Reason Code', and 'Reports To'. There are also 'Load EFFDT' and 'Request Type' fields. The 'Search' button is highlighted with a red circle. A blue box highlights the search fields.

1. Enter the effective date of the change using the magnifying glass behind **Load EFFDT**

2. Select the **Request Type**

- Dependent on what changes are being made
- Determines what the approval workflow will be

| Request Type | Update Allowed/Reason Code |
|---------------------|--|
| HR Agency Only | Location Code Reports To |
| HR/Bdgt Agency Only | Department ID (Restructure/Reorganization) Job Code Location Code Reports To Regular / Temporary (LEG & Courts only) |

3. Use the available search fields to help narrow down your returned values

4. Click **Search**

Mass Request

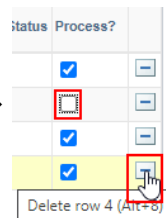
Request ID Request Status Request Type

| Request ID | Position Number | Name | Business Unit | Reason Code | Effective Date | Load EFFDT |
|------------|-----------------|----------------|---------------|-------------|----------------|------------|
| 1 | 000000 | Administrative | 000000 | UPD | 07/09/2021 | 12/04/2022 |
| 2 | 000000 | Administrative | 000000 | UPD | 01/27/2022 | 12/04/2022 |
| 3 | 000000 | Administrative | 000000 | UPD | 05/19/2021 | 12/04/2022 |
| 4 | 000000 | Administrative | 000000 | UPD | 02/17/2020 | 12/04/2022 |

5 Save

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

- You may uncheck or delete rows to process so additional lines are not an issue →
- Double-check your **Request Type** before saving because you can't change it later

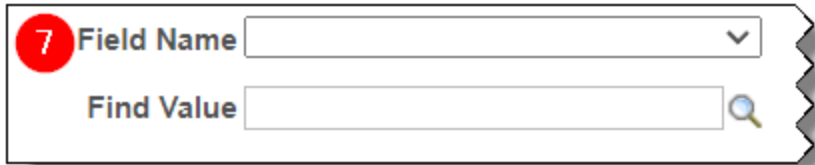




A new Mass Update Request will be created. (21012,6)


Press OK to proceed, or Cancel to return.

6

6. Click **OK**



7 Field Name 
Find Value 

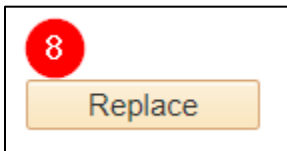


Replacement Value 

7. 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

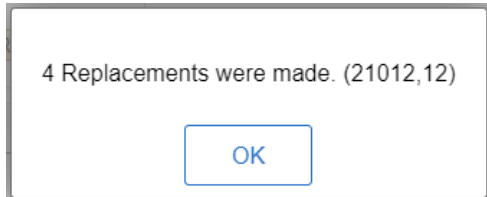


UPD is the default reason; this is not a valid value for submission. If you do not update the field to reflect the type of update you are making before clicking Submit, the system displays an invalid value pop-up error and will not allow you to submit until this field is changed.



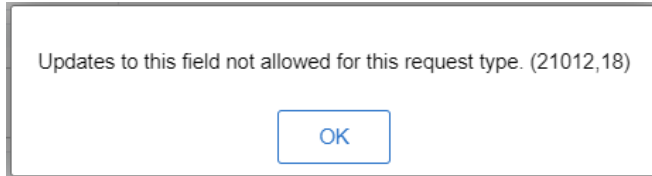
8

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



4 Replacements were made. (21012,12)

- If a field is chosen that is not allowed for the **Request Type**, a pop-up will let you know:



Updates to this field not allowed for this request type. (21012,18)

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

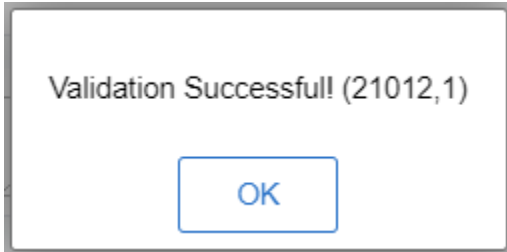
Load EFFDT

Request Type

9

9. 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/Status** column
 - will display the “green light” for success; click for more details:

| Validation/Status |
|-------------------|
| |
| |
| |
| |
| |

Messages and Exceptions Personalize | Find | 📄 | 🗨️

| Last Update Date/Time | Message Severity | Description |
|-----------------------|------------------|------------------------|
| 11/30/2022 4:37:19PM | Message | Validation Successful! |
| 11/30/2022 4:35:27PM | Message | Validation Successful! |

- will display “warning” for errors; click for more details:

| Validation/Status |
|-------------------|
| |
| |

Messages and Exceptions Personalize | Find | 📄 | 🗨️

| 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. |

- 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.
- 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.

| Messages and Exceptions | | |
|-------------------------|------------------|---|
| Last Update Date/Time | Message Severity | Description |
| 11/08/2022 8:07:04AM | Error | Another request M000000014 is in process for this position. Please cancel that request before proceeding. |

Return

NOTE: The Validate button creates a message every time you click it

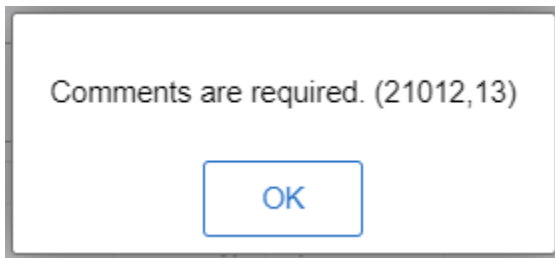
Mass Request

Request ID M000000003 Request Status Comments

Request Type HR Agency Only 10

10. 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:



Save 11 Submit

Cancel Request

11. Click **Submit**

- Once submitted, the workflow will appear as shown. The workflow for mass update is the same as workflow for single update.

Submit and Approve

Comment

Mass Position Approvals

▼ **WI_MREQUEST_ID=M000000003:Approved** View/Hide Comments

Mass Position Approvals

Self Approved

Happel, Stacie

Agency HR/Budget Posn Approver

✓ 12/01/22 - 12:03 PM

▶ **Comments**

[Return to Position Request Home](#)

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.

Apply the Updates to Position and Job Data

Unlike the single position requests, these changes will not be applied automatically. You must run the process to apply the updates to Position and Job Data.

Navigation: State of Wisconsin (STAR) > Human Resources > Process > Mass Position Load AE

1. Select **Add a New Value** the first time you run this. Use **Find an Existing Value** for all future runs.
2. Enter **MASS** for your Run Control ID
3. Click **Add**

4. Enter or search for the submitted **Request ID**
5. Click **Run**

Process Scheduler Request

User ID Run Control ID MASS

Server Name: Run Date: 12/01/2022

Recurrence: Run Time: 3:03:51PM

Time Zone:

| Select | Description | Process Name | Process Type | *Type | *Format | Distribution |
|-------------------------------------|--------------------|--------------|--------------------|-------|---------|--------------|
| <input checked="" type="checkbox"/> | Mass Position Load | WI_HR_POSMAS | Application Engine | Web | TXT | Distribution |

6. Click OK

Mass Posn Load

Run Control ID MASS

Report Manager

Process Instance: 4104543

7. Make note of the Process Instance number and click the **Process Monitor** link to monitor the progress of the process

Process List | Server List

View Process Request For

User ID: Type: Last 8 Hours

Server: Name: Instance From: Instance To: Report Manager

Run Status: Distribution Status: Save On Refresh

| Select | Instance | Seq. | Process Type | Process Name | User | Run Date/Time | Run Status | Distribution Status | Details |
|--------------------------|----------|------|--------------------|--------------|-----------|---------------------------|------------|---------------------|---------|
| <input type="checkbox"/> | 4104535 | | Application Engine | WI_HR_POSMAS | HAPPELXCE | 12/01/2022 12:25:04PM CST | Success | Posted | Details |

- 8. **User ID** defaults to your IAM and will display all processes you have run within the timeframe selected
- 9. You can narrow your search by entering WI_HR_POSMAS behind **Name** and clicking **Refresh**
- 10. Once the process runs to "Success" the mass position update is complete and the Position and Job Data updates should be reflected in HCM