

Position Management: Creating a Position Transaction (ATPM)

The **ATPM transaction** can be used by the Financial Officer to **add (fast) all standing or fixed-term** positions.

> Note:

If the position is split with another administrative area that you are not responsible for, you must use one of the forms (AAPM or AEPM) to create the position.

```
12/10/98          INTEGRATED BUSINESS INFORMATION SYSTEM          M1M1
11:07:54.1                                             DAM3

Any of the functions included in this system can be invoked by
entering the corresponding function code on the command line next
to 'NEXT FUNCTION:'. The following functions are available:

FUNCTION          DESCRIPTION          FUNCTION          DESCRIPTION
-----          -
FORM             Help Selecting HRS Forms      M2PI             Property Inventory
M2AH             IBIS Adhoc Functions          M2PR             Purchasing System
M2AS             EASY Elec. Appr. System       M2VA             Vendor System
M2BG             Budgeting System              BAMM             Budget Planning: BudAuto
M2FN             Financial System              M2IM             Inventory Management
M2FS             Facilities System             CODE             Codeset Maint. System
M2HR             Human Resources System        M2NC             Nat Conn. Applications
M2PA             Payroll System                M2PE             Pay & Effort Functions

NEXT FUNCTION: atpm 1          PREV MENU: NONE
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      HELP  MENU  CMPS  END  .  .  .  .  .  .  KEYS  PRNT  .
```

1. At **Next Function** on **M1M1**, type **ATPM**.

Press **Enter**.

> Note:

If you do not know the function to fast path, type in **M3PM** for a list of the Position Management functions.

If this position is split with another administrative area that you are not responsible for, you must use one of the forms (AEPM or AAPM) to create the position.

```

COMPLETE REQUIRED FIELDS AND PRESS ENTER KEY
12/10/98                               POSITION MANAGEMENT TRANSACTION          Screen 1.0
11:08:35.5                             ADD POSITION                                     ATPM
                                                                                               DAM3

H Admin Area:  _____  Pos #:  _____ - 000  ① Pos Type:  E
② Home Budget:  _ - _ - _  UP ③ App Salary:  _____  Pos Status:  UN
Annualz Sal:  _____  Name:  _____
④ Class:  _____  ⑤ Pos Apt Type:  _____  Rank:  _____
⑥ Ex/Nonex:  _  Job Desc #:  _____ - _____  Pos FTE:  _____
Grade:  _____  ACAM/EXEC T1:  _____  Clsf Rvwd:  N
Sal Plan:  _____  ACAM/EXEC T2:  _____
Per Rep #:  _____  Job Desc Ttl:  _____
Work Loc:  _ - 000  Acad Title:  _____
Work Unit:  _____
Collapse Pos:  N  Adm Pos Hld:  N  Mult-apt Pos:  N
Cen Pos Hld:  N  Clsf Pos Hld:  N  Sal Red Crcl:  N
Pos Beg Dte:  12 / 10 / 1998  Pos End Dte:  / /  Fndg Hld:  N
Prt Form:  _  Pos Stat Dte:  / /  Submit Cls:  N

NEXT KEY:
NEXT FUNCTION:  _____  (HELP, MENU, END)

```

Enter the following information:

1. At **Pos Type**, type in a **P** for a **permanently funded** position *or* a **T** for a **temporary funded** position.

> Note:

Standing and fixed-term multi-year positions must be permanently funded.

2. At **Home Budget**, type in the budget number that is the administrative home of the position.
3. At **App Salary** (if funding is to be committed at this time), type in the annual salary.
4. At **Class**, type in the personnel class.

> Note:

Press **PF1** to view the appropriate class codes.

5. At **Pos Apt Type**, type in the budget position appointment type.

> Note:

Press **PF1** to view the appropriate appointment type codes.

6. At **Ex/Nonex**, if Class = STFF, type in an **E** for Exempt or an **N** for non-exempt.

Press the **Enter** key to establish the edits for the position being created.

Required fields may vary depending upon the class and appointment type:

Executive/Academic Administrators:

```
COMPLETE REQUIRED FIELDS AND PRESS ENTER KEY
12/10/98                               POSITION MANAGEMENT TRANSACTION          Screen 1.0
11:11:48.1                             ADD POSITION                                     ATPM
                                                                                               DAM3

H Admin Area: 028                        Pos #: __935 - 000                        Pos Type: P
Home Budget: 02 - 028 - 28 UP           App Salary: 35000.00__                   Pos Status: UN
Annualz Sal:                             Name:
Class: ACAM                             Pos Apt Type: STN                        1 Rank: __
Ex/Nonex: _                             Job Desc #: ____ - ____                 Pos FTE: ____
Grade: __                               3 ACAM/EXEC T1: ____                    Clsf Rvwd: N
4 Sal Plan: __                           5 ACAM/EXEC T2: ____
6 Per Rep #: 320                         Job Title: _____
8 Work Loc: UP - 000                     Acad Title: _____

Collapse Pos: N                          Adm Pos Hid: N                          Mult-apt Pos: N
Cen Pos Hid: N                          Clsf Pos Hid: N                         Sal Red Crcl: N
11 Pos Beg Dte: 12 / 10 / 1998          Pos End Dte: / /                        Fndg Hid: N

Prt Form: _                             Pos Stat Dte: / /                       Submit Cls: N

NEXT KEY:
NEXT FUNCTION: _____ <HELP, MENU, END>
```

1. At **Rank**, type in the rank if applicable.

> Note:

Press **PF1** for a list of valid rank codes.

3. At **Acam/Exec T1**, type in the code for the primary University title.

> Note:

Press **PF1** for a list of valid title codes.

4. At **Sal Plan**, type in the number of months for executive (ex. 12M) or the number of weeks for academic administrators (ex. 36W).

5. At **Acam/Exec T2**, type in the code for the secondary or dual University title.

> Note:

Press **PF1** for a list of valid title codes.

- At **Per Rep #**, verify that the Human Resource Representative number is correct. If it is incorrect, type in the correct Human Resource Representative number.

> Note:

Press **PF1** for a list of Human Resource Representative numbers.

- At **Work Loc**, verify the physical work location. If it is incorrect, type in the correct location code.

> Note:

Press **PF1** to list the valid location codes.

- At **Pos Beg Dte**, type in the position begin date.

> Note:

The position begin date must be the same or earlier than the appointment begin date of the employee filling the position.

Academic:

COMPLETE REQUIRED FIELDS AND PRESS ENTER KEY		
12/10/98	POSITION MANAGEMENT TRANSACTION	Screen 1.0
11:37:37.7	ADD POSITION	ATPM
		DAM3
H Admin Area: 028	Pos #: __936 - 000	Pos Type: P
Home Budget: 02 - 028 - 28 UP	App Salary: 35000.00__	Pos Status: UN
Annualz Sal:	Name:	
Class: ACAD	Pos Apt Type: STN	① Rank: __
Ex/Nonex: _	Job Desc #: ___ - ___	Pos FTE: ___
Grade: __	ACAM/EXEC T1: __	Clsf Rvwd: N
④ Sal Plan: __	ACAM/EXEC T2: __	
⑥ Per Rep #: 320	Job Title: _____	
⑧ Work Loc: UP - 000	⑨ Acad Title: _____	
Work Unit: NA_		
Collapse Pos: N	Adm Pos Hid: N	Mult-apt Pos: N
Cen Pos Hid: N	Clsf Pos Hid: N	Sal Red Crcl: N
⑪ Pos Beg Dte: 12 / 10 / 1998	Pos End Dte: / /	Fndg Hid: N
Prt Form: _	Pos Stat Dte: / /	Submit Cls: N
NEXT KEY:		
NEXT FUNCTION: _____ <HELP, MENU, END>		

- At **Rank**, type in the rank.

> Note:

Press **PF1** for a list of valid rank codes.

4. At **Sal Plan**, type in the number of weeks in the contract (ex. 36W).
6. At **Per Rep #**, verify that the Human Resource Representative number is correct. If it is incorrect, type in the correct Human Resource Representative number.

> Note:

Press **PF1** for a list of Human Resource Representative numbers.

8. At **Work Loc**, verify the physical work location. If it is incorrect, type in the correct location code.

> Note:

Press **PF1** to list the valid location codes.

9. At **Acad Ttl**, type in the discipline.
11. At **Pos Beg Dte**, type in the position begin date.

> Note:

The position begin date must be the same or earlier than the appointment begin date of the employee filling the position.

Administrators, Staff and Technical Service:

COMPLETE REQUIRED FIELDS AND PRESS ENTER KEY		
12/10/98	POSITION MANAGEMENT TRANSACTION	Screen 1.0
11:41:08.5	ADD POSITION	ATPM
		DAM3
H Admin Area: 028	Pos #: 937 - 000	Pos Type: P
Home Budget: 02 - 028 - 28 UP	Bud Salary: 35000.00	Pos Status: UN
Annualz Sal:	Name:	
Bud Class: STFF	Pos Apt Type: STN	1 Rank: _____
Ex/Nonex: E	Job Desc #: _____ - _____	Pos FTE: _____
2 Bud Grade: _____	ACAM/EXEC T1: _____	Clssf Rvwd: U
4 Sal Plan: _____	ACAM/EXEC T2: _____	
6 Per Rep #: 320	7 Bud Job Title: _____	
8 Work Loc: UP - 000	Acad Title: _____	
10 Work Unit: 320		
Collapse Pos: N	Adm Pos Hid: N	Multi-apt Pos: N
Gen Pos Hid: N	Clssf Pos Hid: N	Sal Red Crcl: N
11 Pos Beg Dte: 12 / 10 / 1998	Pos End Dte: / /	Fndg Hid: N
Prt Form: -	Pos Stat Dte: / /	12 Submit Cls: N
NEXT KEY:		
NEXT FUNCTION: _____ <HELP, MENU, END>		

1. At **Rank**, type in the rank for Agricultural Extension Agents and Administrators, if applicable.

> **Note:**

Press **PF1** for a list of valid rank codes.

2. At **Bud Grade**, type in the grade requested.

> **Notes:**

- o For Administrators, type **NA**.
- o Press **PF1** to list the valid grades.

4. At **Sal Plan**, type in the appropriate monthly plan for Administrators and Staff. For Technical Service, type in the weekly plan (ex. 52W).

6. At **Per Rep #**, verify that the Human Resource Representative number is correct. If it is incorrect, type in the correct Human Resource Representative number.

> **Note:**

Press **PF1** for a list of Human Resource Representative numbers.

7. At **Bud Job Titl**, type in the requested personnel job title.

8. At **Work Loc**, verify the physical work location. If it is incorrect, type in the correct location code.

> Note:

Press **PF1** to list the valid location codes.

10. At **Work Unit**, verify the work unit. If it is incorrect, type in the correct work unit.

> Note:

Press **PF1** to list the valid work unit codes.

11. At **Pos Beg Dte**, type in the position begin date.

> Note:

The position begin date must be the same or earlier than the appointment begin date of the employee filling the position.

12. At **Submit Clsf**, if you want the classification to begin, type in a **Y**. This will create a **UEPY** form and submits it to the approval path for **UEPY**. If you do not want the position classified at this time, type in an **N**.

Press **PF8**.

If funding is going to be committed, the Salary Budget Distribution and Source/Destination of Funds screens must be completed.

This screen is the increase side of your budget amendment.

To complete the Salary Budget Distribution screen, do the following:

- If a position has split budget distributions, a line must be completed for each.

```

12/10/98                POSITION MANAGEMENT                Screen 2.0
11:45:52.3             SALARY BUDGET DISTRIBUTION        ATPM
                                                                DAM3
H Admin Area: 028                Pos #: 00938-000        Pos Type: P
Home Budget: 02-028-28 UP      New Pos Salary: 35000.00    Pos Status: UN

Temp Pos BA: N                Old Pos Salary:                Obj Code: 104

   Budget Fund  RA# Trn Cd  Sal %  Sal Amnt | Net Change
1.  0202828 UP  10010  028  10  85.7  30000 |
2.  0402828 UP  10010  028  10  14.3  5000  |
3.  _____ |
4.  _____ |
5.  _____ |
6.  _____ |
7.  _____ |
8.  _____ |
9.  _____ |
10. _____ |

NEXT KEY:
NEXT FUNCTION: _____ (HELP, MENU, END)

```

- For each budget distribution, complete as follows:

1. At **Budget**, type in the budget number for this distribution. The first distribution line must be the home budget and general funds. If there is no general fund charge to this budget and fund, enter a zero in the salary amount column or leave it blank.

> Note:

ARL is an exception to the general funds requirement.

- At **Fund**, type in the fund number associated with the budget for this distribution.
- At **Trn Cd**, type in the transaction code indicating the source of funds.

> Note:

For miscellaneous funds, leave this blank for they do not require a budget amendment.

- At **Sal%**, **DO NOT** type in this column.
- At **Sal Amnt**, type in the amount to be budgeted to this budget and fund.

Press **PF8**.

> Note:

A funding hold will be placed on this position if the Salary Budget Distribution and Source/Destination of Funds screens are not completed.

If the Salary Budget Distribution screen has been completed, the Source/Destination of Funds screen will appear. This screen must be completed when the Salary Budget screen is completed.

> Note:

This screen will not appear for miscellaneous funds.

This screen is the decrease side of the budget amendment.

```
12/10/98                               POSITION MANAGEMENT                               Screen 3.0
11:48:03.8                             SOURCE/DESTINATION OF FUNDS                             ATPM
                                                                                               DAM3
H Admin Area: 028                       Pos #: 00938-000                               Pos Type: P
Home Budget: 02-028-28 UP               New Pos Salary: 35000.00                       Pos Status: UN

GENERAL FUNDS: 35000                               BA#:
AG FED. FUNDS:                               Fndg Eff Dte: 12 / 10 / 1998                   BA#:
AUXILIARY ENT:                               Auto/Bat BA(A/B): A                             BA#:
  UNIV SERV:                               P.L. 94-482:                                     BA#:
  P.L. 94-482:                               BA#:

SOURCE/DESTINATION                               Obj Trn   Incr /                               Position
          Budget   Fund   Cd   Cd   (-)Decr   AA#   #   Suf   Pos   BA
          Budget   Fund   Cd   Cd   (-)Decr   AA#   #   Suf   Amount Typ
1.    ① 0202828 U ② 10010 ③ 1B ④ 10 ⑤ -30000 028 ⑥ -   -   -   P
2.    0402828 UP 10010 11B 10 -5000 028 -   -   -   P
3.    _____  _____  _____  _____  _____  _____  _____  _____  _____  -
4.    _____  _____  _____  _____  _____  _____  _____  _____  _____  -
5.    _____  _____  _____  _____  _____  _____  _____  _____  _____  -
6.    _____  _____  _____  _____  _____  _____  _____  _____  _____  -
7.    _____  _____  _____  _____  _____  _____  _____  _____  _____  -

NO MORE BUDGETS : N
NEXT KEY:
NEXT FUNCTION: _____ <MENU, KEYS, END>
```

To complete the Source/Destination of Funds screen, do the following:

- Enter one line for each budget, fund and object category funding source.
 1. At **Budget**, type in the budget number to be decreased.
 2. At **Fund**, type in the fund number to be decreased.
 3. At **Obj Cd**, type in the University object code to be decreased.
 4. At **Trn Cd**, type in the transaction code. This code must be the same transaction code

entered on the previous screen - Salary Budget Distribution.

5. At **Incr/(-)Dec**, type in the amount. This amount will be a decrease to this budget, fund and object code
6. At **Position #**, if you are reducing an unfilled position to fund this position, type in the position number your are reducing.

Press **PF12** to complete the transaction and update the database. A budget amendment will be created via a batch process that evening and submitted to your approval path for **AABP**. The **AABP** will appear as an item on the **BAFM** screen for the first approver.

The following message will appear:

"POSN # created and Budget Amendment submitted."

To ensure that your position was created, use **IQPM** to view the position and **IQBA** to view the budget amendment information.

If you are reducing a position to provide the funding for the position being created, the position being reduced will be updated when the budget amendment has completed the approval cycle.

Last Revised: 10/26/2003