

HE Reorg Process

The HE Reorg process was developed to give campuses a way to process department reorganization in mass within PeopleSoft. The process will move a department from one department ID to another while updating the department budget table and position data accordingly. (Note: With PeopleSoft's Position Management functionality, when the department ID is updated in position data, a row will be added in job data with the same effective date to update the department ID.)

The navigation is: **ND HE Applications > Commitment Accounting > HE Reorg Process**. To begin a new process a new value needs to be added.

HE Reorg Process

Find an Existing Value | Add a New Value

Set ID:

Adjustment Date:

Prior Department ID:

New Department:

Add

[Find an Existing Value](#) | [Add a New Value](#)

Set ID: Enter your business unit.

Adjustment Date: Enter the effective date of the reorganization.

Prior Department ID: Enter the department number that is to be moved.

New Department: Enter the new department number the prior department number is moving to.

Once the data is entered, click Add. Each position number set up in the prior department ID will appear on the page. When the following page appears, it is recommended to first click **Save**. By iteratively saving the page, it allows the user to work with the information until they are ready to update the data.

Set ID WSC01
 Adjustment Date 06/01/2013
 Current Dept ID 3100 Bookstore
 New Dept ID 2790 Student Services

Process Monitor

[View DBTs not selected](#)

Positions in Current Dept				Personalize	Find	First	1-6 of 6	Last
Select	Position Number	Position Description	Position Data Eff Status	Name	Empl ID	Empl Record	Processed	
<input type="checkbox"/>	00010601	Pt Bookstore/Asst Mgr	Active				0	
<input type="checkbox"/>	00010614	PT Bookstore	Active				0	
<input type="checkbox"/>	00010754	Temporary Employee Bookstore	Active				0	
<input type="checkbox"/>	00023236	Student Dining/Coffee	Active				0	
<input type="checkbox"/>	00028072	Bookstore/Teton Java	Active				0	
<input type="checkbox"/>	00028394	Director of Auxiliary Services	Active				0	

[Select All](#) [Deselect All](#)

Select: Check this box to select the position for processing.

Position Number: Displays the position number.

Position Description: Displays the position number description.

Position Data Eff Status: Displays the status of the position which is from position data. If the position data effective status is inactive, the position is not eligible for processing. If it were to be selected a new row would be inserted thus activating the position.

Name: Displays the name of the incumbent. If the position is a pool or vacant then Pool or Vacant will be displayed.

Empl ID: Displays the empl id of the incumbent.

Empl Record: Displays the Empl Record of the incumbent.

Processed: Displays the date when the position was processed.

The criterion that was entered when a new value was added is displayed at the top of the page. The information in this grid comes from the department budget table. A full or partial reorg is possible by using the Select boxes. If only some positions are moving to the new department number, select them individually by clicking the box in the Select column. If all positions are moving to the new department number click Select All.

IMPORTANT NOTE: Remember to keep in mind the update incumbent flag in position data. When a new row is inserted into position data the update incumbent flag is automatically checked even if the previous row has the update incumbent unchecked. When the update incumbent flag is checked the current row from position data will automatically flow to job data updating all the fields. If this is not desired it is recommended to not select those positions for processing and manually update the department budget table, position data, and job data. This may affect more of the pool positions when the update incumbent flag is unchecked.

Once the positions have been selected, click Populate Funding to display the DBT fields. Only active DBT's will be populated. In the event there are inactive DBT's for that department, a hyperlink will appear upon saving the page. DBT's by appointment will also appear if any are setup that meets the criteria. DBT's that show up in the hyperlink is informational only. The next screenshot is an example of the information provided in the hyperlink popup window.

Set ID WSC01
Dept ID 3100

Personalize Find First 1 of 1 Last				
Fiscal Year	Status	Budget Level	Position Number	Empl ID
1	2013 Inactive	Position	00028632	

OK Cancel

When the effective date is 7/1/NFY (next fiscal year) for the adjustment date a message will display in place of the Populate Funding button. It states that no funding is needed when adjustment date is 7/1/NFY. Only position data is affected so it is not necessary to inactivate the DBT for the prior department id since DBT's are by fiscal year. The Budgeting Module will create the new department id DBT when that process is run.

The DBT information will be displayed in two screenshots. The first screenshot displays the current row data from the prior department id DBT, the department id that is being moved.

Mass Combo Cd Replace									
Replace									
With									
Replace									
Personalize Find First 1 of 7 Last									
	Fiscal Year	Position	Position Description	Name	Current Earnings Cd	Current Combo Cd	Current Budget Amount	Current Distribution %	Current Redirect Combo Cd
1	+	2013 00010601	Pt Bookstore/Asst Mgr			W105013100R	21216.000		
2	+	2013 00010614	PT Bookstore			W105013100R	18720.000		
3	+	2013 00010754	Temporary Employee Bookstore			W105013100O	5562.000		
4	+	2013 00023236	Student Dining/Coffee			W1050131003315O	6974.130		
5	+	2013 00028072	Bookstore/Teton Java			W105013100R	18720.000		
6	+	2013 00028394	Director of Auxiliary Services			W105013100R	32187.500		
7	+					W105053130R	32187.500		

Save Return to Search Previous in List Next in List

Mass Combo Cd Replace: This can be used to populate the new combo code field. This works similarly to the Find/Replace functionality in other software. The Replace field has a drop down where all the current combo codes can be found. The With field has a lookup glass where a new combo code can be chosen. If the funding source is not changing then the Replace and With fields can be the same.

Position: Displays the position number.

Position Description: Displays the position description.

Name: Displays the incumbent in single positions. If the position number is a pool or vacant position, Pool or Vacant will be displayed.

Current Earnings Cd: Displays an earnings code from the prior department id DBT. Work study, H14 is an example that may appear in this column.

Current Combo Cd: Displays the combination code from the prior department id DBT. If split funding exists the information will be blank for the columns fiscal year, position, position description, and name. This will group the rows for a position with split funding and can be easier to identify when there is split funding. In the screenshot above position number 00028394 has split funding.

Current Budget Amount: Displays the budgeted salary from the prior department id DBT. If no budgeted salary exists, this column will be blank.

Current Distribution %: Displays the distribution percent from the prior department id DBT. If no distribution percent exists, this column will be blank.

Current Redirect Combo Cd: Displays the redirect combo code from the prior department id DBT. If no redirect combo code exists, this column will be blank.

New Earnings Code	New Combo Cd	New Budget Amount	Allow Overspend	New Distribution %	New Redirect Combo Code	Override Deductions	Override Taxes	Do Not Use Funding	Processed
		21216.000	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		18720.000	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		5562.000	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		6974.130	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		18720.000	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		32187.500	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		32187.500	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

New Earnings Code: Enter an earnings code if one is necessary to create the new DBT. This column will be automatically populated if an earnings code existed in the prior department id.

New Combo Cd: Enter a combination code for the new department DBT. This column is not automatically populated. The Mass Combo Cd Replace can be used to populate this column. The lookup glass also works to find a combo code.

New Budget Amount: This column is automatically populated with the amount from the current budget amount. This can be updated or changed as necessary. If none exists, this field will be blank.

Allow Overspend: Check this box if the new DBT should be created with the setting of allow to overspend the budgeted salary.

New Distribution %: This column is automatically populated with the information from the current distribution percent. This can be updated or changed as necessary. If none exists, this field will be blank.

New Redirect Combo Code: This column is automatically populated if a redirect combo code existed on the current DBT. If none exists, this field will be blank. This can be updated or changed as necessary. When this field is populated HEBEN is automatically assigned when the new DBT is created. The Mass Combo Cd Replace does not work with the redirect combo code. This column needs to be manually updated.

Override Deductions: Check this box if this applies to the new DBT.

Override Taxes: Check this box if this applies to the new DBT.

Do Not Use Funding: Check this box if this row of funding is no longer valid for the new DBT. If a row is checked for do not use funding, when the new DBT is created the row will be ignored. Rows are not allowed to be deleted for audit and troubleshooting purposes. New rows can be added by clicking the plus sign which is displayed at the beginning of each row.

Processed: This box will become checked once the process is run per position.

The page can be saved without entering all the required fields. This allows the user to start and stop at various times without receiving error messages. There are edits built in with the Run button once Run is selected. Some of the edits include:

1. New combo code fields completed and none are blank
2. New budgeted salary amount or distribution % fields are complete (one or the other for each row of funding)
3. Duplicate combo codes may not exist for a position
4. When distribution % is used the percent must equal 100%

A message will display when the Run button is selected and all errors are resolved. The message displayed is: *You are going to run the reorg process. Press OK to continue or Cancel to return to the reorg page.* Only click the Run button once. Once it's clicked the page is not redirected to the process monitor, unlike other processes in the HRM System. Once the Run button is selected, then click on the

Process Monitor hyperlink to view the process and status. The reason this process functions this way is because when Run is selected it creates a unique run control id. This unique run control id will allow other users that have access to the HE Reorg Process to see other users reorg processes within the same business unit.

If the process ends in No Success, the errors can be resolved and the process can be restarted. However, if the process runs successfully and some errors occur during the process, those positions will need to be manually updated since they will be flagged as processed. Here is an example of the output log:

```

          Set ID: WSC01
        Fiscal Year: 2013
    Adjustment Date: 2013-06-01
    Current Dept ID: 3100
        New Dept ID: 2790

*****
* Legend *
* ----- *
* E = Error (did not load successfully) *
* N = Not Applicable *
* Y = Loaded Successfully *
*****

Position      DBT      Position      DBT
Number      Inactivated   Updated      Created
-----
00010601         Y           Y           Y
00010614         Y           Y           Y
00010754         Y           Y           Y
00023236         Y           Y           Y
00028072         Y           Y           Y
00028394         Y           Y           Y

```

The output log displays what the process updated. The legend displays the definition of the characters used to show what the process completed. Not applicable will be used when the adjustment date is 7/1/NFY. The reason is because the old DBT does not need to be inactivated and the new DBT does not need to be created since that will be created with the Budgeting Module.

When the process is complete and all positions have been moved to the new department id the page will be displayed as:

Set ID WSC01 Process Monitor

Adjustment Date 06/01/2013 **All positions have been processed; Page deactivated**

Current Dept ID 3100 Bookstore

New Dept ID 2790 Student Services View DBTs not selected

Positions in Current Dept							
Position Number	Position Description	Position Data Eff Status	Name	Empl ID	Empl Record	Processed	
100010601	Pt Bookstore/Asst Mgr	Active	Kayleen Anderson	0406119		0 05/06/2013	
200010614	PT Bookstore	Active	Amy Johnson	0347633		0 05/06/2013	
300010754	Temporary Employee Bookstore	Active	POOL POSITION			0 05/06/2013	
400023236	Student Dining/Coffee	Active	POOL POSITION			0 05/06/2013	
500028072	Bookstore/Teton Java	Active	Marlene Sandaker	7018088		0 05/06/2013	
600028394	Director of Auxiliary Services	Active	Andrea Heller	0392530		0 05/06/2013	

A message is displayed that says *All positions have been processed; Page deactivated*. The processed column shows the date the position was moved to the new department id. The DBT section will display the processed column as:

Processed
<input checked="" type="checkbox"/>

This completes the HE Reorg Process!