Inserting a Position
into the Position Hierarchy
User Guide

| Overview | The Workforce Management Tool (WMT) builds upon our existing Human Resources (HR) information technology, leveraging current CHRIS functionality. The goal is to provide leaders and line managers with the real-time HR information and the tools they need to strategically plan the size, structure and capabilities of their workforce.

The WMT will increase the availability and usability of workforce information, and the capability to use it.
The initial focus of the WMT project is to provide leaders and managers with the capability to perform effective position management. What's position management? It's a series of steps that managers and supervisors go through to determine the type of organizational structure needed to accomplish the mission, how many positions are needed, and how positions should be designed.

The WMT will give you the capability to:
- Access workforce information by individual, position, and organization;
- Develop short- and long-term workforce planning strategies;
- Plan workforce size, structure and skill sets to support current and future business needs;
There has been no way to identify and manage positions, including simply tracking vacancies. As such, the WMT will provide that capability by moving CHRIS from an employee based to a position based hierarchy, and assigning a unique Position Control Number (PCN) to every encumbered and approved vacant position. Managers will be able to see and track all their positions, and get data to help structure and manage them. |
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User Guide Purpose: Illustrates the process of inserting vacant and/or encumbered positions into the position hierarchy.

Navigating to the Position Hierarchy Screen

Step 1 – Go to the CHRIS homepage gsa.gov/chris and logon.

Step 2 – From the Navigator window, click on the **"??? WMT Super User"** responsibility, then click on **"Hierarchy"** under Position.

Position
- Eliminate
- Hierarchy
- Obligation
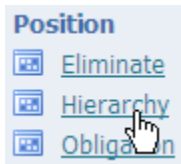
OR

click on the **"??? HRO WMT Super User"** responsibility, then click on **"Hierarchy"** under Position.

Position
- Eliminate
- Hierarchy
- Obligation
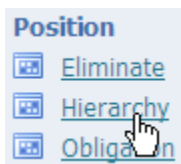
OR

click on the "**??? (HR or HR IG or HR CPC) WMT Super User"** responsibility, then click on **"Hierarchy"** under Position.

Position
- Update, Copy or Eliminate
- Hierarchy
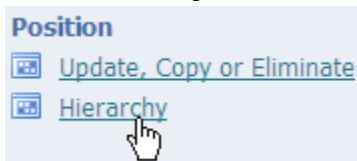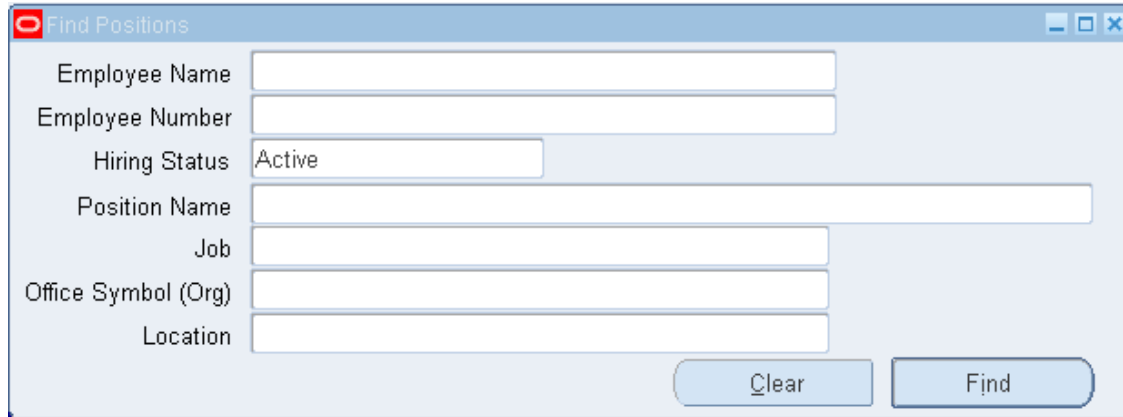
OR

click on the "**??? WMT Federal Personnelist"** responsibility, then click on **"Hierarchy"** under Work Structures : Position.

Work Structures : Position
- Create, Update, Delete
- Hierarchy

The **"Find Position"** window opens.

Find Positions		
Employee Name		
Employee Number		
Hiring Status	Active	
Position Name		
Job		
Office Symbol (Org)		
Location		
	Clear	Find
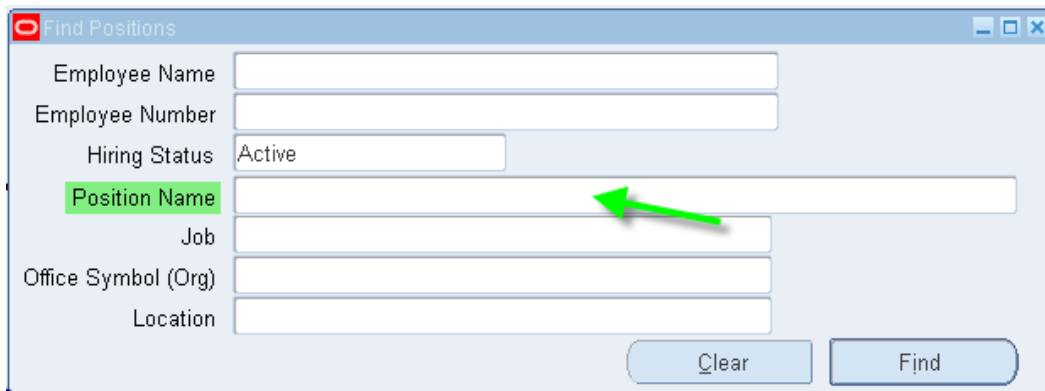
Querying a Vacant Position

The following steps cover the process of inserting a vacant position into the position hierarchy. For steps to insert an encumbered position into the position hierarchy please move on to the next section of this user guide.

NOTE: Use the CHRIS Alert entitled *"Update Position Hierarchy - Vacant"* to identify vacant positions that need to be inserted into the Hierarchy.
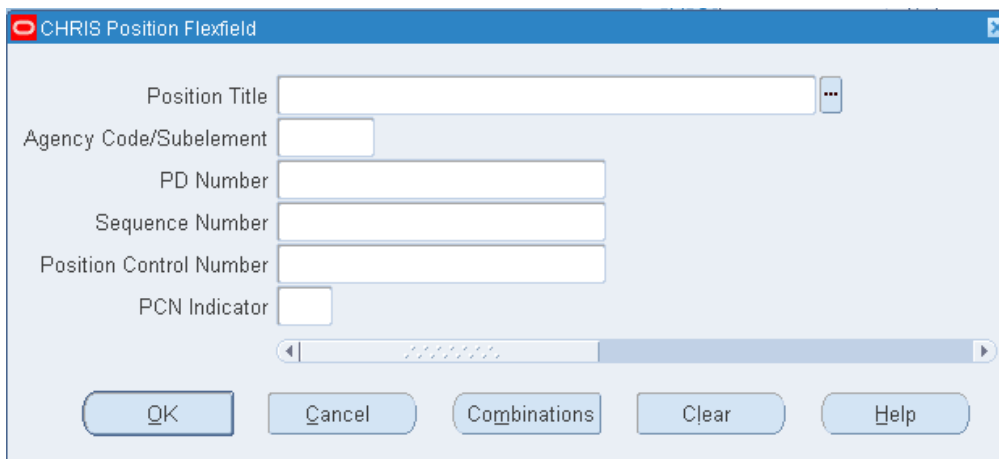
Step 1 – Since the vacant position does not have an incumbent, we will not be able to search by "**Employee Name**" or "**Employee Number**". Click in the "**Position Name**" field

The **"CHRIS Position Flexfield"** window opens.

Step 2 - Enter the Position Control Number of the vacancy from the *"Update Position Hierarchy - Vacant"* Alert, then click the **"OK"** ⬜ OK button.
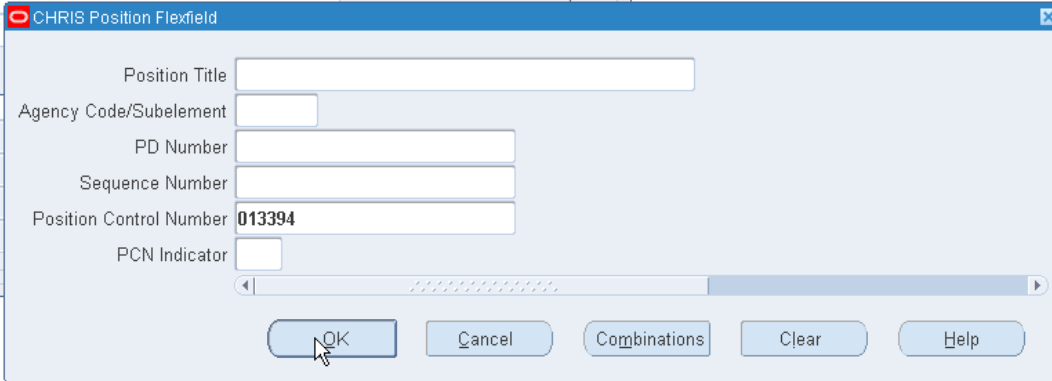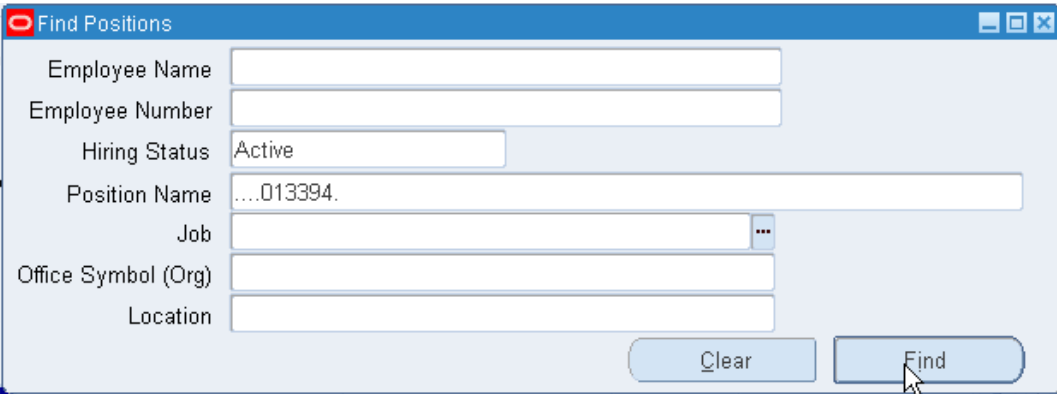
CHRIS Position Flexfield

Position Title	
Agency Code/Subelement	
PD Number	
Sequence Number	
Position Control Number	013394
PCN Indicator	

OK   Cancel   Combinations   Clear   Help

The **"Find Positions"** window populates.

Find Positions

Employee Name	
Employee Number	
Hiring Status	Active
Position Name	....013394.
Job	...
Office Symbol (Org)	
Location	

Clear   Find

Step 3 – You're now ready to run your query based on your PCN criteria. Click the **"Find"** Find button on the **"Find Positions"** window.

Find Positions

Employee Name	
Employee Number	
Hiring Status	Active
Position Name	....013394.
Job	...
Office Symbol (Org)	
Location	

Clear   Find

The "Position" section of the **"Position Hierarchy"** window populates with the position(s) that meet the PCN query criteria.

NOTE: To check to see If multiple positions meet the search criteria (i.e., 013394.C; 013394.D) you can use the up and down arrow keys on the keyboard to scroll through these positions.

Determining if a Position
is in the Position Hierarchy

Step 1- A position is not included in the hierarchy when the ☐ E_xists In Hierarchy box is not

checked and the ⬆ Up arrow is grayed out.

NOTE: The position will not have a "Team Lead" and/or "Supervisor" designated if it is not in the hierarchy.

Inserting a Vacant Position into the Position Hierarchy

Step 1 – Select and copy the entire **"Name"** field under **"Position"**.

Step 2 – We're now going to insert this vacant position into the hierarchy. Select the **"Find"** icon.

The **"Find Positions"** window will appear.

Step 3 – Search for a person or position in the hierarchy that you'd like to link the vacant position to. In this example, we're going to search by employee name.

NOTE: For more information on querying a person or position in the Position Hierarchy, reference the "*WMT User Guide - Position Hierarchy Navigation".*

Click in the **"Employee Name"** field and enter the name of the employee you want this vacancy to report to, and then click the **"Find"** [Find] button.

The **"Position"** section of the **"Position Hierarchy"** window populates with the position(s) that meet the "Employee Name" query criteria.

NOTE: You cannot insert a position into the hierarchy unless the parent position (Team Lead or Supervisor position) is in the hierarchy. The "Exists in Hierarchy" [✔ Exists In Hierarchy] **field will be checked if the parent position is in the hierarchy. If the box isn't selected, you'll have to correct the hierarchy working from the top down.**

Step 4 – To insert the vacant position into the position hierarchy, click on any of the entries under the **"Name"** field within the **"Subordinates"** section, then select the **"New"** [icon] icon in the top left corner.

A blank line appears under the selected record in the **"Subordinates"** section, which will allow you to insert a position into the position hierarchy.

Step 5 – In step 1, you copied the **"Name"** field of the vacant position you wanted to insert into the hierarchy. Now, paste what you had copied into the yellow **"Name"** field. Next, hit the tab key on the keyboard and the **"Name"** field will populate with **"**No Holders**"**. **"**No Holders**"** appears when a position is vacant.

For your information: If it turns out that you selected the **"New"** icon by accident, or need to remove the position that you've inserted to the hierarchy, select the row you'd like to delete and select the **"Delete"** icon.

A **"Decision"** window will appear. Click the **"Yes"** button.

Step 6 – Select the **"Save"** icon to complete the insertion of the vacant position into the hierarchy.

In the bottom left hand corner of your screen the

"FRM-40400: Transaction complete: 1 records applied and saved."

message will tell you that the transaction successfully completed.

NOTE: If you don't see this bar at the bottom of your screen, maximize your screen by selecting the **"Maximize"** icon in the top right corner of your screen.

Step 8 – Select the **"Down Arrow"** icon in the row of the vacant position that you just inserted.

You'll see that vacant position now exists in the hierarchy, and has a supervisor. You've successfully added a vacant position to the hierarchy. This completes this section of the user guide.

Querying an Encumbered Position

The following steps cover the process of inserting an encumbered position into the position hierarchy. For steps to insert a vacant position into the position hierarchy please reference the previous section of this user guide.
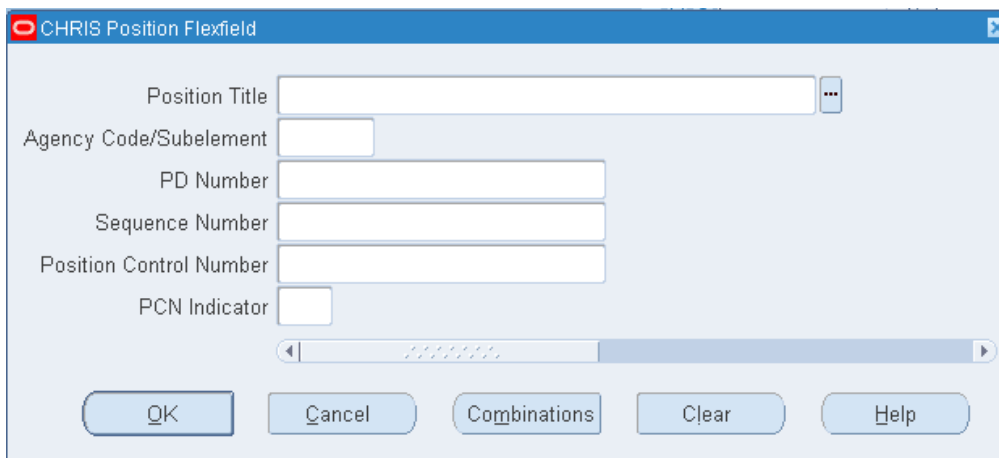
NOTE: Use the CHRIS Alert entitled *"Update Position Hierarchy - Encumbered"* **to identify encumbered positions that need to be inserted into the Hierarchy.**

Step 1 – Click in the "**Position Name**" field

The **"CHRIS Position Flexfield"** window opens.

Step 2 - Enter the Position Control Number of the vacancy from the ***"Update Position Hierarchy - Encumbered"*** Alert, then select the **"OK"** [OK] button.

The **"Find Positions"** window populates.

Step 3 – You're now ready to run your query based on your PCN criteria. Click the **"Find"** [Find] button on the **"Find Positions"** window.

The "Position" section of the **"Position Hierarchy"** window populates with the position(s) that meet the PCN query criteria.

NOTE: To check to see If multiple positions meet the search criteria (i.e., 003756C; 003756.D) you can use the up and down arrow keys on the keyboard to scroll through these positions.

Determining if a Position
is in the Position Hierarchy
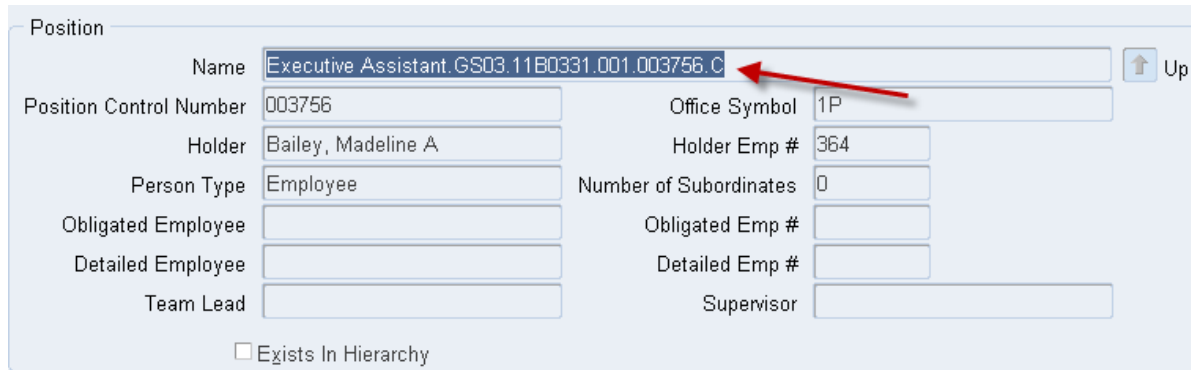
Step 1- A position is not included in the hierarchy when the ☐ Exists In Hierarchy box is not

checked and the [↑ Up] arrow is grayed out.

Position	
Name	Executive Assistant.GS03.11B0331.001.003756.C [↑ Up]
Position Control Number	003756
Office Symbol	1P
Holder	Bailey, Madeline A
Holder Emp #	364
Person Type	Employee
Number of Subordinates	0
Obligated Employee	
Obligated Emp #	
Detailed Employee	
Detailed Emp #	
Team Lead	
Supervisor	
☐ Exists In Hierarchy	

NOTE: The position will not have a "Team Lead" and/or "Supervisor" designated if it is not in the hierarchy.

Inserting an Encumbered Position into the Position Hierarchy

Step 1 – Select and copy the entire **"Name"** field under **"Position"**.

Step 2 – We're now going to insert this encumbered position into the hierarchy. Select the **"Find"** icon.

The **"Find Positions"** window will appear.

Step 3 – Search for a person or position in the hierarchy that you'd like to link the vacant position to. In this example, we're going to search by employee name.

NOTE: For more information on querying a person or position in the Position Hierarchy, reference the "*WMT User Guide - Position Hierarchy Navigation".***

Click in the **"Employee Name"** field and enter the name of the employee you want this vacancy to report to, and then click the **"Find"** [Find] button.

The **"Position"** section of the **"Position Hierarchy"** window populates with the position(s) that meet the "Employee Name" query criteria.

NOTE: You cannot insert a position into the hierarchy unless the parent position (Team Lead or Supervisor position) is in the hierarchy. The "Exists in Hierarchy" ☑ Exists In Hierarchy **field will be checked if the parent position is in the hierarchy. If the box isn't selected, you'll have to correct the hierarchy working from the top down.**

Step 4 – To insert the vacant position into the position hierarchy, click on any of the entries under the **"Name"** field within the **"Subordinates"** section, then select the **"New"** 🟩➕ icon in the top left corner.

A blank line appears under the selected record in the **"Subordinates"** section, which will allow you to insert a position into the position hierarchy.

Step 5 – In step 1, you copied the **"Name"** field of the vacant position you wanted to insert into the hierarchy. Now, paste what you had copied into the yellow **"Name"** field. Next, hit the tab key on the keyboard and the **"Name"** field will populate with the employee's name (i.e., Bailey, Madeline A).
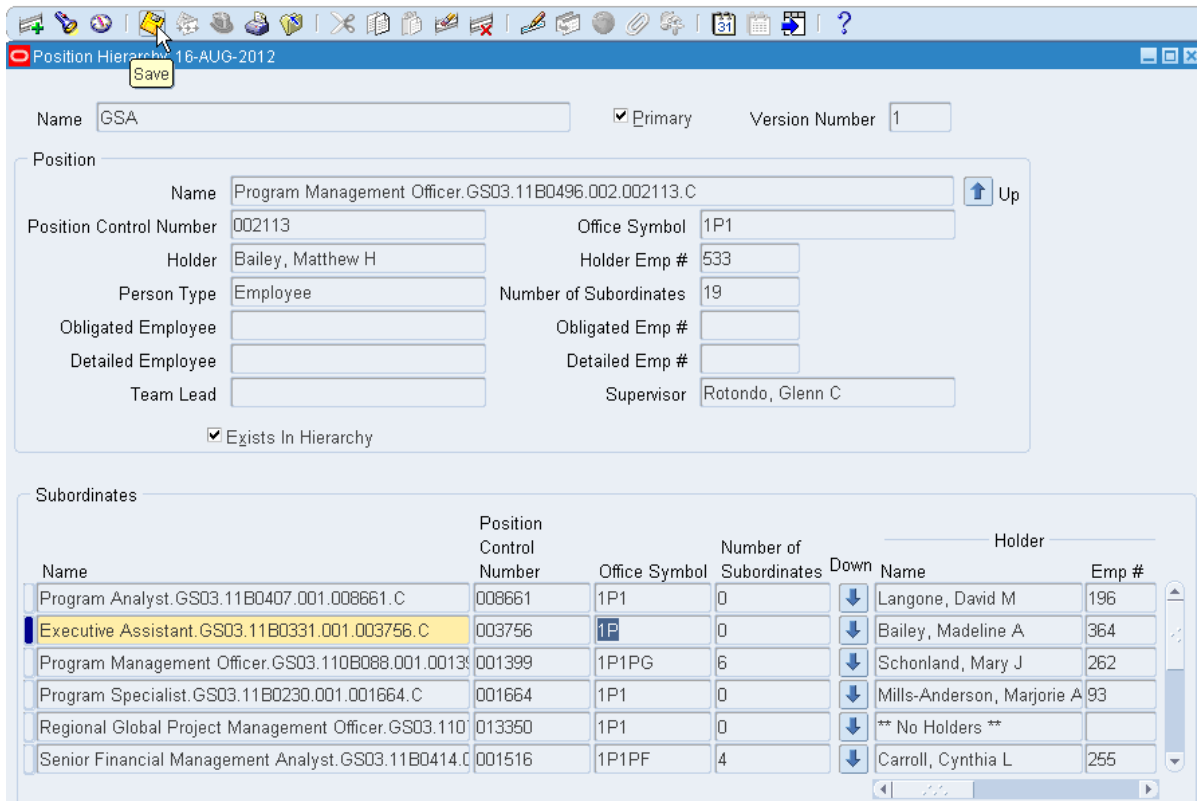

For your information: If it turns out that you selected the **"New"** icon by accident, or need to remove the position that you've inserted to the hierarchy, select the row you'd like to delete and select the **"Delete"** icon.

A **"Decision"** window will appear. Click the **"Yes"** button.

Step 6 – Select the **"Save"** icon to complete the insertion of the encumbered position into the hierarchy.

Step 7 – In the bottom left hand corner of your screen the

"FRM-40400: Transaction complete: 1 records applied and saved."

message will tell you that the transaction successfully completed.

NOTE: If you don't see this bar at the bottom of your screen, maximize your screen by selecting the **"Maximize"** icon in the top right corner of your screen.

Step 8 – Select the **"Down Arrow"** icon in the row of the encumbered position that you just inserted.

You'll see that vacant position now exists in the hierarchy, and has a supervisor. You've successfully added a vacant position to the hierarchy. This completes this section of the user guide

Closing the Position Hierarchy Window and Logging Out of CHRIS

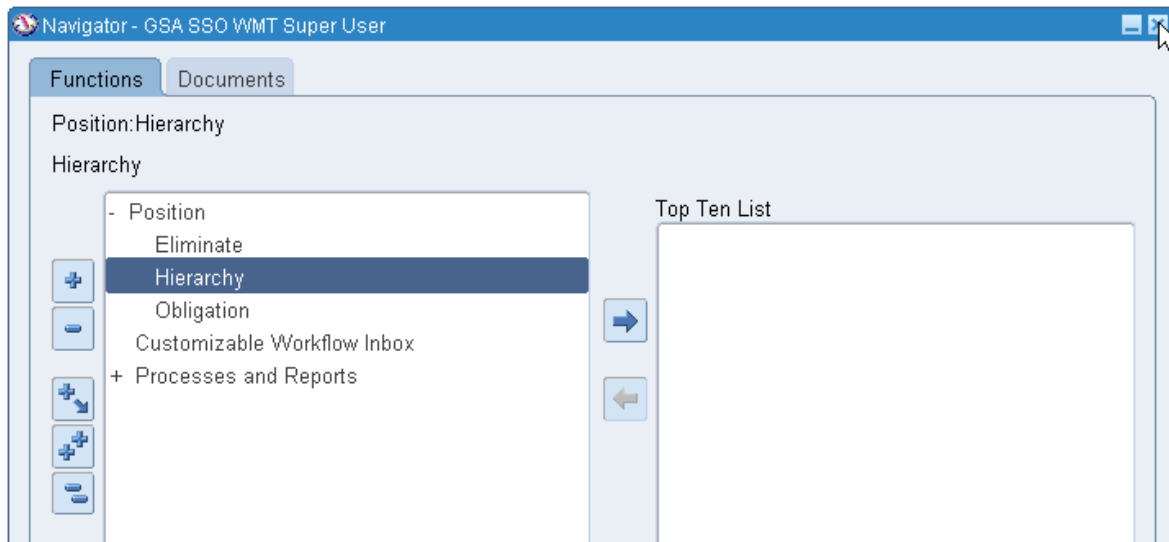**Step 1 -** To close the **"Position Hierarchy"** window, click on the **"x"** [icon] in the upper right corner of the window.

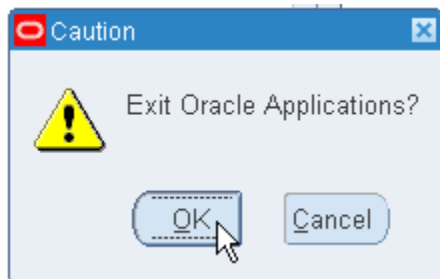It will return you to the **"Navigator"** window.
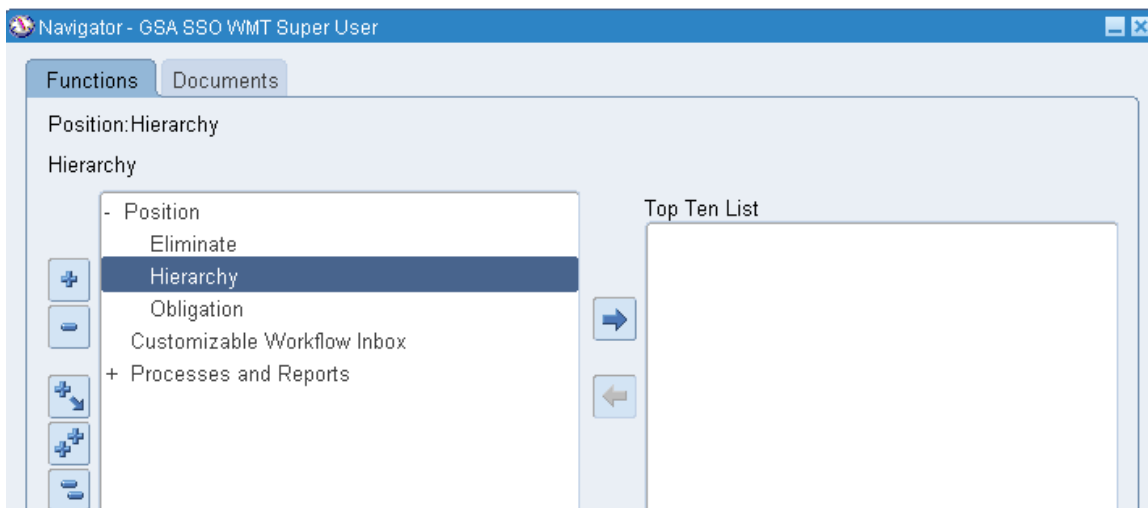
Step 2 - To close the **"Navigator"** window, click on the **"x"** ☐☒ in the upper right corner of the window.

A **"Caution"** window will appear.
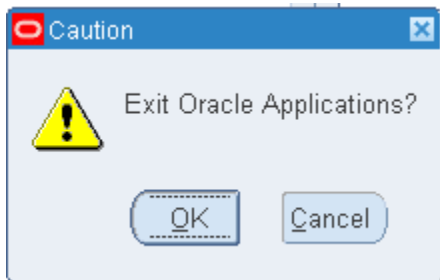
Step 3 - Click the **"OK"** [OK] button.

Step 4 – To close the remaining Oracle windows, click on the **"x"** [icon] in the upper right corner of each window.

Step 5 – Click **"Logout"** to logout of CHRIS.

Lead or Supervisor, field 10 will populate with that positions subordinate positions.