

# Reviewing Record History (who updated the record last) User Guide

<b>Overview</b>	<p>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.</p> <p>The WMT will increase the availability and usability of workforce information, and the capability to use it.</p> <p>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.</p> <p>The WMT will give you the capability to:</p> <ul style="list-style-type: none"><li>• Access workforce information by individual, position, and organization;</li><li>• Develop short- and long-term workforce planning strategies;</li><li>• Plan workforce size, structure and skill sets to support current and future business needs;</li></ul> <p>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.</p>
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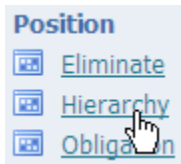
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**User Guide Purpose:** Illustrates the process of reviewing a record's history in the position hierarchy.

# Navigating to the Position Hierarchy Screen

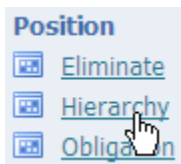
**Step 1** – Go to the CHRIS homepage [gsa.gov/chris](http://gsa.gov/chris) and logon.

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



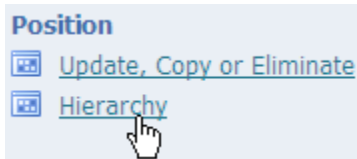
**OR**

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



**OR**

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

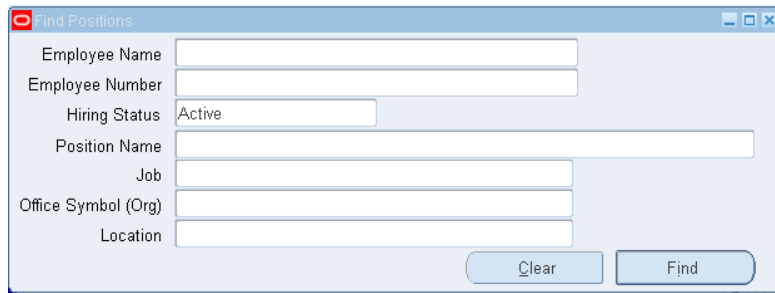


**OR**

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



The **“Find Position”** window opens.

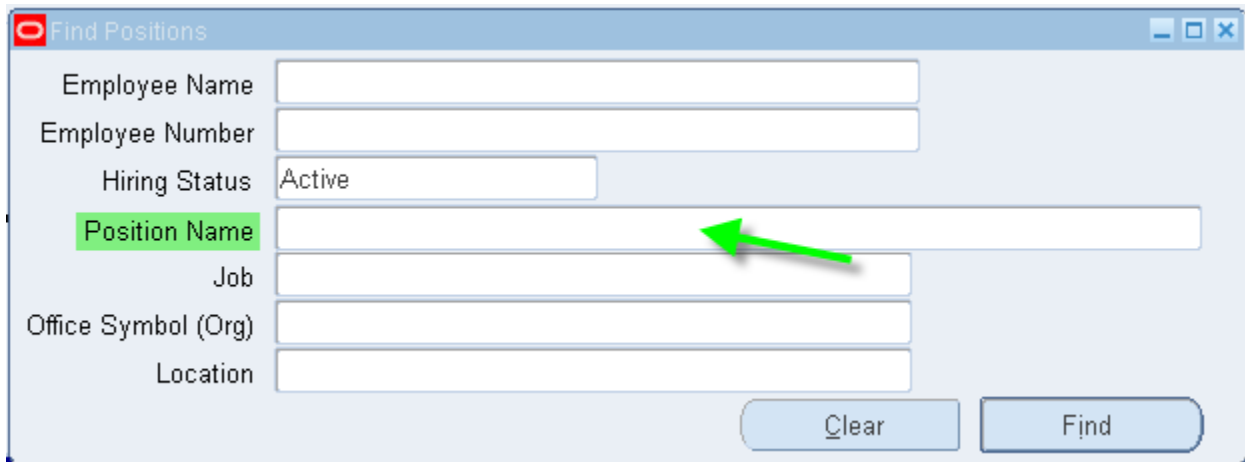


The screenshot shows a window titled "Find Positions" with a search form. The form includes the following fields and controls:

- Employee Name:
- Employee Number:
- Hiring Status:
- Position Name:
- Job:
- Office Symbol (Org):
- Location:
- Buttons: "Clear" and "Find"

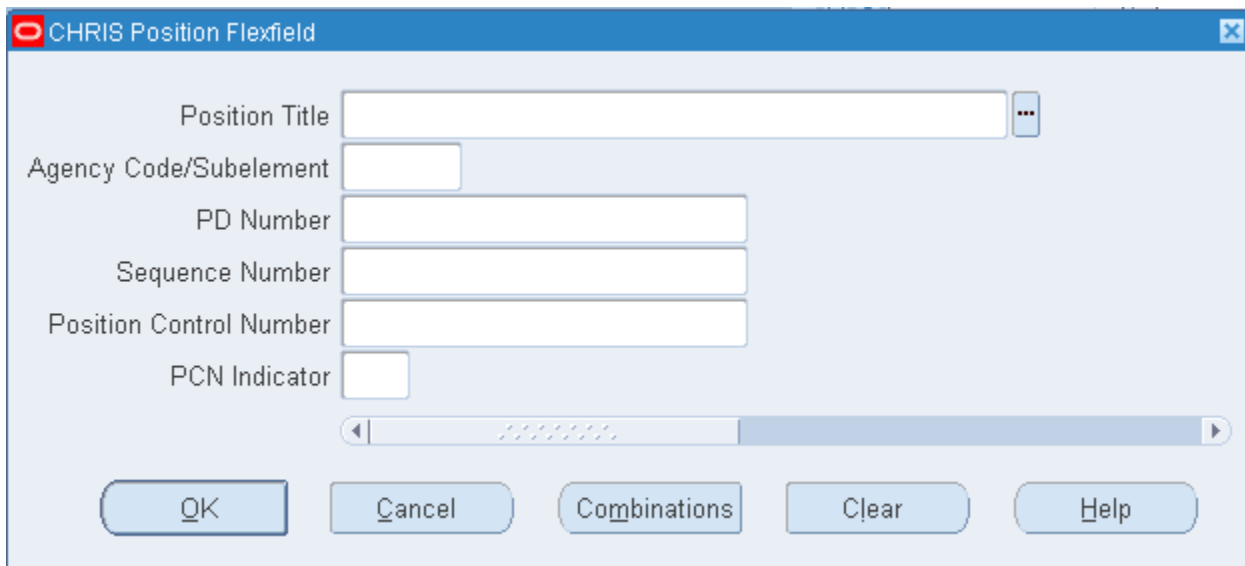
# Querying a Vacant Position

**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



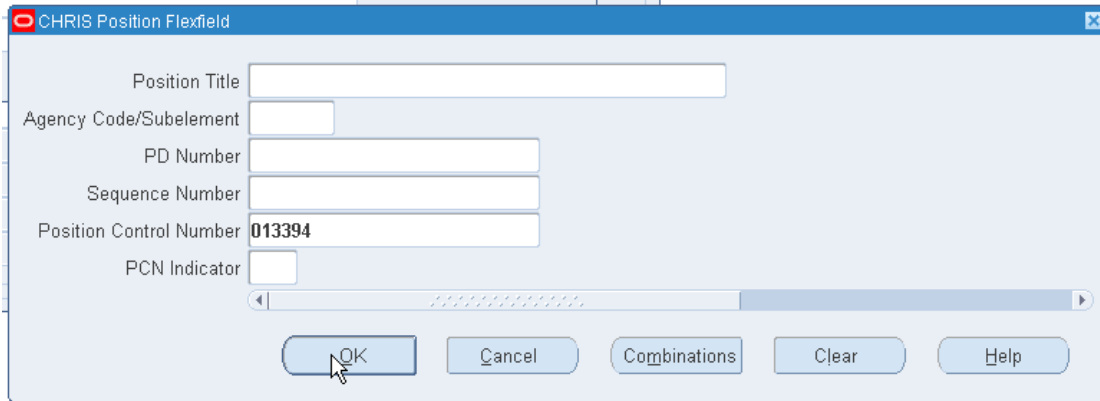
The screenshot shows a window titled "Find Positions" with several input fields. The "Position Name" field is highlighted in green, and a green arrow points to it. The other fields are: Employee Name, Employee Number, Hiring Status (set to Active), Job, Office Symbol (Org), and Location. At the bottom right, there are "Clear" and "Find" buttons.

The “**CHRIS Position Flexfield**” window opens.

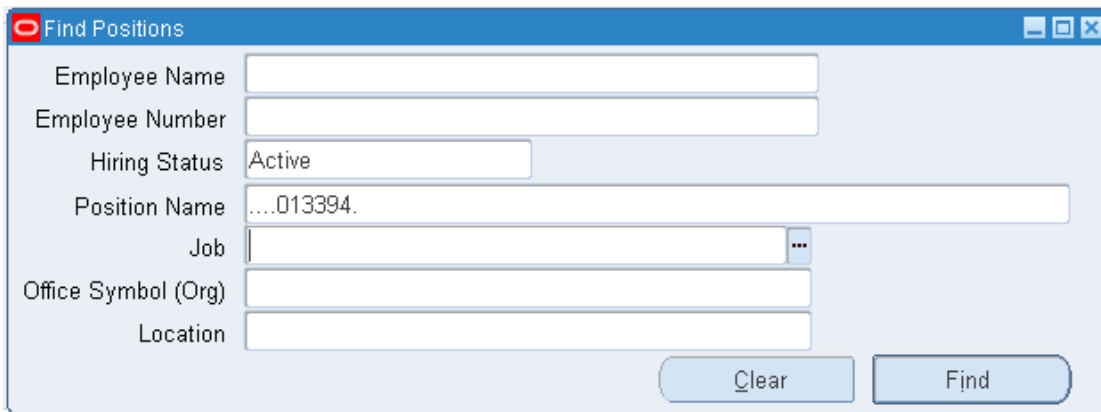


The screenshot shows a window titled "CHRIS Position Flexfield" with several input fields. The fields are: Position Title, Agency Code/Subelement, PD Number, Sequence Number, Position Control Number, and PCN Indicator. Below the PCN Indicator field is a scroll bar. At the bottom, there are buttons for "OK", "Cancel", "Combinations", "Clear", and "Help".

**Step 2** - Enter the Position Control Number of the vacancy you want to move, then click the “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” 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.

The screenshot shows a software window titled "Position Hierarchy". At the top, there is a search bar with "GSA" entered, a checked "Primary" checkbox, and a "Version Number" field with "1". Below this is a "Position" section containing several fields: "Name" (Special Assistant.GS03.11B0429.008.013394.C), "Position Control Number" (013394), "Office Symbol" (1P), "Holder" (\*\* No Holders \*\*), "Holder Emp #", "Person Type", "Number of Subordinates" (0), "Obligated Employee", "Obligated Emp #", "Detailed Employee", "Detailed Emp #", "Team Lead", and "Supervisor" (Rotondo, Glenn C). A checkbox "Exists In Hierarchy" is checked. Below the position details is a "Subordinates" section with a table header: "Name", "Position Control Number", "Office Symbol", "Number of Subordinates", "Down", "Name", "Holder", and "Emp #". The table currently contains one row with a "1" in the "Emp #" column.

**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 included in the hierarchy when the  Exists In Hierarchy box is checked, and the  Up arrow is not grayed out..

Position	
Name	Special Assistant.GS03.11B0429.008.013394.C 
Position Control Number	013394
Office Symbol	1P
Holder	** No Holders **
Holder Emp #	
Person Type	
Number of Subordinates	0
Obligated Employee	
Obligated Emp #	
Detailed Employee	
Detailed Emp #	
Team Lead	
Supervisor	Rotondo, Glenn C
<input checked="" type="checkbox"/> Exists In Hierarchy	


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




# Reviewing a Vacant Positions Record History (who updated the record last)

**Step 1** – Click the “Up”  button on the vacant position you want to review the record history on.

Position

Name **Special Assistant.GS03.11B0429.008.013394.C**  Up

Position Control Number 013394 Office Symbol 1P  Up

Holder \*\* No Holders \*\* Holder Emp #

Person Type Number of Subordinates 0

Obligated Employee Obligated Emp #


Detailed Employee Detailed Emp #

Team Lead Supervisor Rotondo, Glenn C

Exists In Hierarchy

You are now viewing the position that the vacant position reports to.

Position

Name **Regional Commissioner for PBS.GS03.X1ES130.002.002066.C**  Up

Position Control Number 002066 Office Symbol 1P

Holder Rotondo, Glenn C Holder Emp # 459

Person Type Employee Number of Subordinates 631







Obligated Employee Obligated Emp #

Detailed Employee Detailed Emp #

Team Lead Supervisor Zametske, Robert C

Exists In Hierarchy

Subordinates

Name	Position Control Number	Office Symbol	Number of Subordinates	Down	Holder Name	Emp #
Client Solutions Division Director.GS03.110Y047.001.01	010013	1PA	11		Thibodeau, Denis J	17443
Client Solutions Division Director.GS03.110Y047.002.01	013391	1PA	0		** No Holders **	
Portfolio Manager.GS03.1100036.006.010014.C	010014	1PT	10		Ditrapano, Katherine F	259
Program Management Officer.GS03.11B0496.002.0021	002113	1P1	21		Bailey, Matthew H	533
Program Operations Officer.GS03.110B074.002.001546	001546	1PS	105		Palladino, Karen A	335
Program Operations Officer.GS03.11B0493.001.002169	002169	1PM	29		Perez, Walter	16587

**Step 2** – If needed, use the scroll bar on the right side of the “Subordinates” section of the Position Hierarchy window to find your vacant position.

Name	Position Control Number	Office Symbol	Number of Subordinates	Down	Holder Name	Holder Emp #
Regional Customer Services & Leasing Director (RCSL)	005220	1PR	585	↓	Richards, Kevin	341
Regional Recovery Executive.GS03.11B0469.001.0016E	001663	1P	0	↓	Conard, Gianne P	16301
Special Assistant.GS03.11B0429.007.010586.C	010586	1P	0	↓	Santos, Michael	20028
Special Assistant.GS03.11B0429.008.013394.C	013394	1P	0	↓	** No Holders **	
Supervisory Project Manager.GS03.11B0130.005.0056E	005692	1PC	38	↓	Ramsey, Janice C	280
Unclassified Set of Duties.GS03.0000000.194.010176.C	010176	1PR	0	↓	** No Holders **	

**Step 3** - Click in the “Name” field on the vacant position.

Name	Position Control Number	Office Symbol	Number of Subordinates	Down	Holder Name	Holder Emp #
Regional Customer Services & Leasing Director (RCSL)	005220	1PR	585	↓	Richards, Kevin	341
Regional Recovery Executive.GS03.11B0469.001.0016E	001663	1P	0	↓	Conard, Gianne P	16301
Special Assistant.GS03.11B0429.007.010586.C	010586	1P	0	↓	Santos, Michael	20028
Special Assistant.GS03.11B0429.008.013394.C	013394	1P	0	↓	** No Holders **	
Supervisory Project Manager.GS03.11B0130.005.0056E	005692	1PC	38	↓	Ramsey, Janice C	280
Unclassified Set of Duties.GS03.0000000.194.010176.C	010176	1PR	0	↓	** No Holders **	

**Step 4** – Click on “Help” above the “Position Hierarchy” window.

File Edit View Folder Tools Window **Help**

Position Hierarchy: 16-AUG-2012

Name:   Primary Version Number:

Position

Name:

Position Control Number:  Office Symbol:

Holder:  Holder Emp #:

Person Type:  Number of Subordinates:

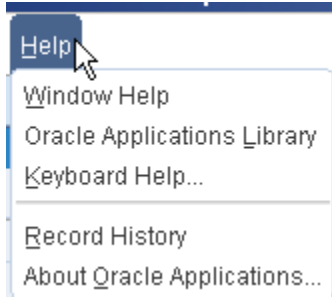
Obligated Employee:  Obligated Emp #:

Detailed Employee:  Detailed Emp #:

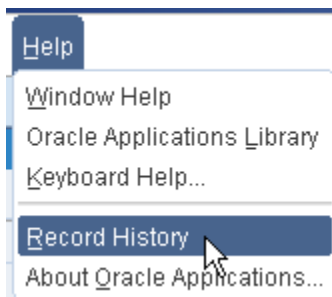
Team Lead:  Supervisor:

Exists In Hierarchy

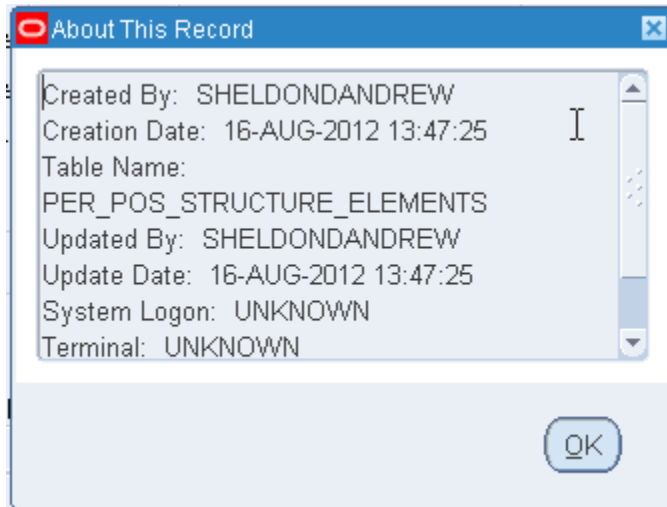
A drop down list appears.



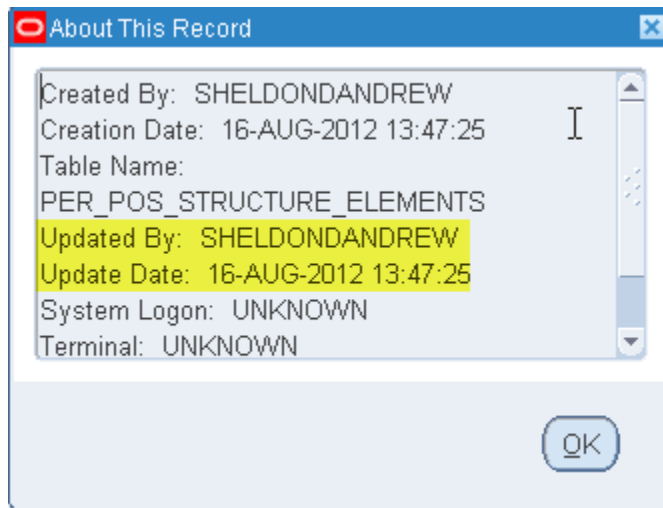
**Step 5 – Select “Record History”.**



An **“About this Record”** window opens.



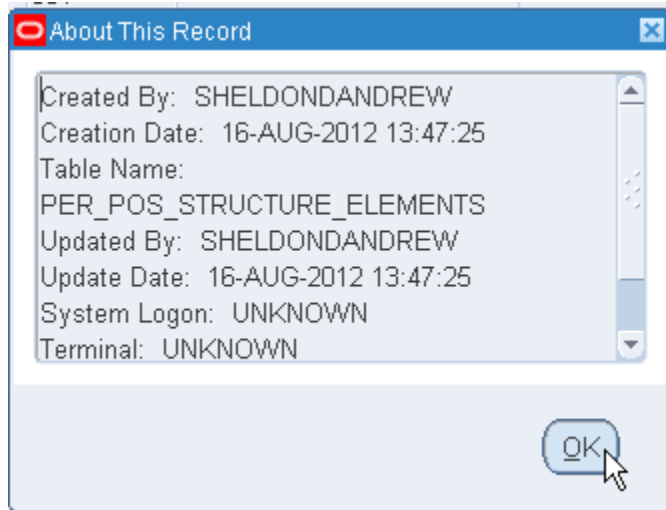
**Step 6** – Look at the “**Updated By**” and “**Update Date**” to see who last modified the record.



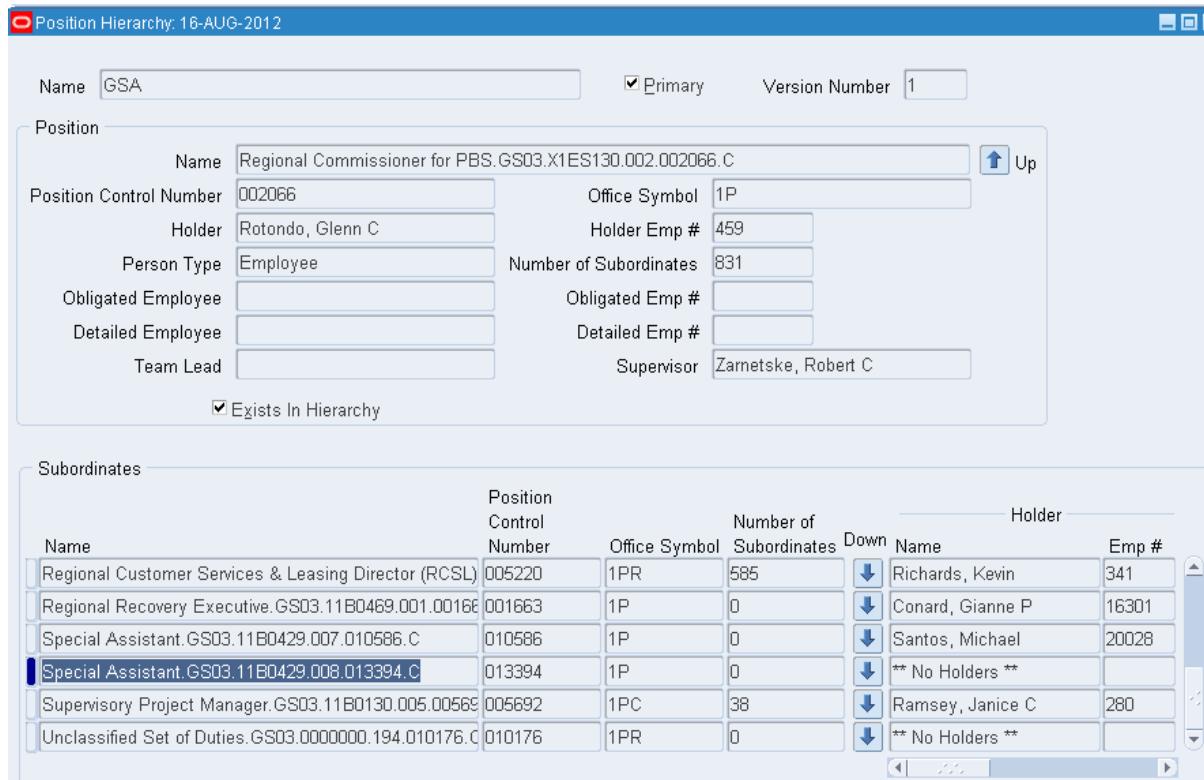
**NOTE:** If you see “**Updated By: GSACONTROL**”, this means that no one has modified the record since it was originally placed in the hierarchy.



**Step 7** – To close the “About This Record” window, click the “OK”  button.

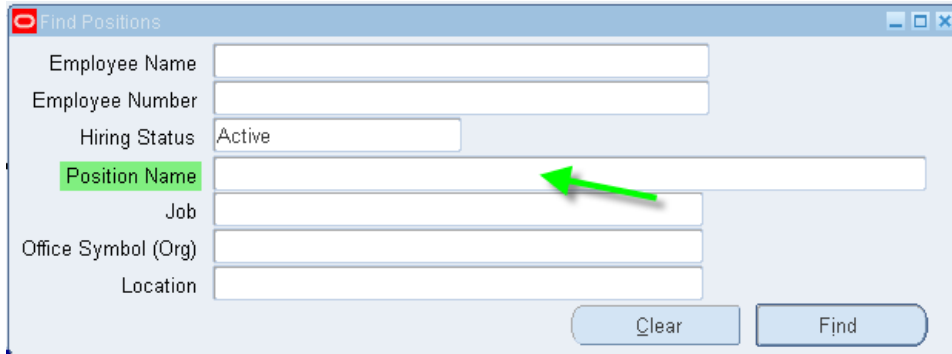


You're returned to the “Position Hierarchy” screen.



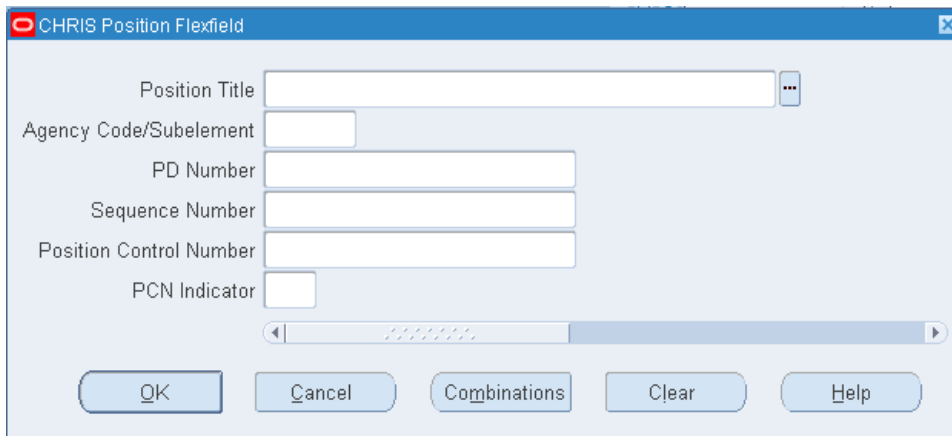
# Querying an Encumbered Position

**Step 1** – Click in the “Position Name” field

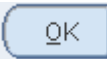


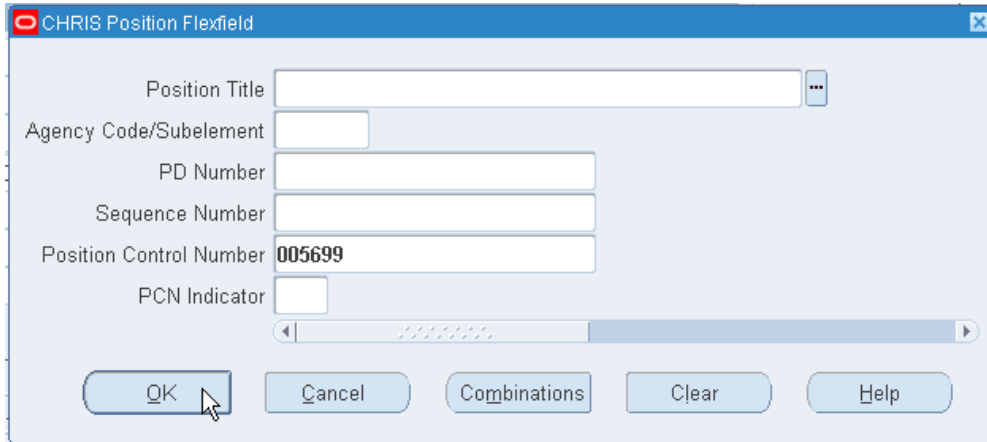
The screenshot shows a window titled "Find Positions" with several input fields. The "Position Name" field is highlighted in green, and a green arrow points to it. The other fields are: Employee Name, Employee Number, Hiring Status (set to "Active"), Job, Office Symbol (Org), and Location. At the bottom right, there are "Clear" and "Find" buttons.

The “CHRIS Position Flexfield” window opens.



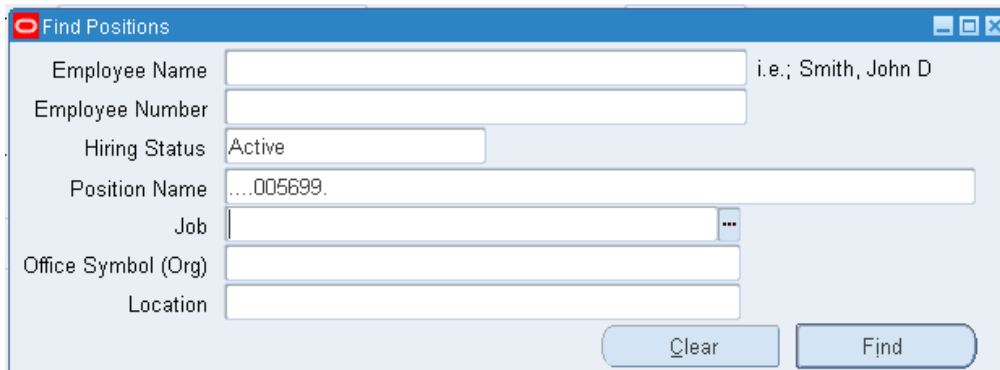
The screenshot shows a window titled "CHRIS Position Flexfield" with several input fields. The fields are: Position Title (with a dropdown arrow), Agency Code/Subelement, PD Number, Sequence Number, Position Control Number, and PCN Indicator. At the bottom, there are buttons for "OK", "Cancel", "Combinations", "Clear", and "Help".

**Step 2** - Enter the Position Control Number of the encumbered position you want to move, then click the “OK”  button.

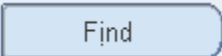


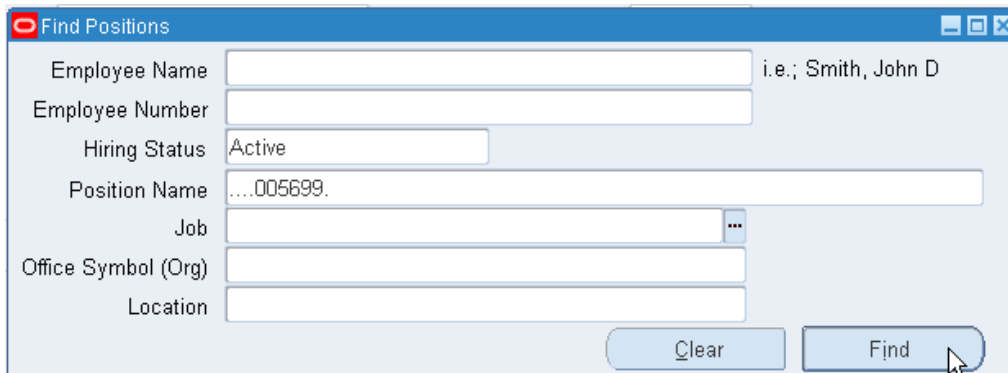
The image shows a dialog box titled "CHRIS Position Flexfield". It contains several input fields: "Position Title" (empty), "Agency Code/Subelement" (empty), "PD Number" (empty), "Sequence Number" (empty), "Position Control Number" (filled with "005699"), and "PCN Indicator" (empty). Below the fields is a horizontal scrollbar. At the bottom, there are five buttons: "OK" (with a mouse cursor over it), "Cancel", "Combinations", "Clear", and "Help".

The “Find Positions” window populates.



The image shows a dialog box titled "Find Positions". It contains several input fields: "Employee Name" (empty, with "i.e.; Smith, John D" to its right), "Employee Number" (empty), "Hiring Status" (filled with "Active"), "Position Name" (filled with "...005699."), "Job" (empty), "Office Symbol (Org)" (empty), and "Location" (empty). At the bottom, there are two buttons: "Clear" and "Find".

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



The image shows the same "Find Positions" dialog box as above, but with a mouse cursor over the "Find" button at the bottom right.


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


The screenshot shows a window titled "Position Hierarchy: 16-AUG-2012". At the top, there is a search field with "GSA" entered, a checked "Primary" checkbox, and a "Version Number" field with "1". Below this is a "Position" section containing several fields: "Name" (Civil Engineer.GS03.WW0M148.005.005699.C), "Position Control Number" (005699), "Office Symbol" (WPCB), "Holder" (Hudson-Boyd, Christopher L), "Holder Emp #" (24843), "Person Type" (Employee), "Number of Subordinates" (0), "Obligated Employee", "Obligated Emp #", "Detailed Employee", "Detailed Emp #", and "Team Lead". A "Supervisor" field contains "Battles, Scott L". A checkbox labeled "Exists In Hierarchy" is checked. Below the "Position" section is a "Subordinates" section with a table header: "Name", "Position Control Number", "Office Symbol", "Number of Subordinates", "Down", "Name", and "Emp #". The table is currently empty.

**NOTE: To check to see if multiple positions meet the search criteria (i.e., 005699.C; 005699.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 included in the hierarchy when the  Exists In Hierarchy box is checked, and the  Up arrow is not grayed out..


Position			
Name	Civil Engineer.GS03.WWDM148.005.005699.C	 Up	
Position Control Number	005699	Office Symbol	WPCB
Holder	Hudson-Boyd, Christopher L	Holder Emp #	24843
Person Type	Employee	Number of Subordinates	0
Obligated Employee		Obligated Emp #	
Detailed Employee		Detailed Emp #	
Team Lead		Supervisor	Battles, Scott L
<input checked="" type="checkbox"/> Exists In Hierarchy			


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

# Reviewing an Encumbered Positions Record History (who updated the record last)

**Step 1** – Click the “Up”  button on the vacant position you want to review the record history on.

Position

Name  

Position Control Number  Office Symbol  

Holder  Holder Emp #

Person Type  Number of Subordinates

Obligated Employee  Obligated Emp #


Detailed Employee  Detailed Emp #

Team Lead  Supervisor

Exists In Hierarchy

You are now viewing the position that the encumbered position reports to.

Position

Name  

Position Control Number  Office Symbol

Holder  Holder Emp #

Person Type  Number of Subordinates







Obligated Employee  Obligated Emp #

Detailed Employee  Detailed Emp #

Team Lead  Supervisor

Exists In Hierarchy

Subordinates

Name	Position Control Number	Office Symbol	Number of Subordinates	Down	Holder Name	Emp #
Civil Engineer.GS03.WW0M148.005.005699.C	005699	WPCB	0		Hudson-Boyd, Christopher	24843
Civil Engineer.GS03.WW29580.133.004250.C	004250	WPCB	0		Vaughn, Robert C	20814
General Engineer.GS03.WW0M148.008.008088.C	008088	WPCB	0		Scarlett, Nadiyah A.	26104
						
						
						

**Step 2** – If needed, use the scroll bar on the right side of the “Subordinates” section of the Position Hierarchy window to find your encumbered position.

Subordinates						
Name	Position Control Number	Office Symbol	Number of Subordinates	Down	Holder Name	Emp #
Civil Engineer.GS03.WW0M148.005.005699.C	005699	WPCB	0	↓	Hudson-Boyd, Christopher	24843
Civil Engineer.GS03.WW29580.133.004250.C	004250	WPCB	0	↓	Vaughn, Robert C	20814
General Engineer.GS03.WW0M148.008.008088.C	008088	WPCB	0	↓	Scarlett, Nadiyah A.	26104
				↓		
				↓		
				↓		

**Note:** In this example the scroll bar is not needed.

**Step 3** - Click in the “Name” field on the encumbered position.

Subordinates						
Name	Position Control Number	Office Symbol	Number of Subordinates	Down	Holder Name	Emp #
Civil Engineer.GS03.WW0M148.005.005699.C	005699	WPCB	0	↓	Hudson-Boyd, Christopher	24843
Civil Engineer.GS03.WW29580.133.004250.C	004250	WPCB	0	↓	Vaughn, Robert C	20814
General Engineer.GS03.WW0M148.008.008088.C	008088	WPCB	0	↓	Scarlett, Nadiyah A.	26104
				↓		

**Step 4** – Click on “Help” above the “Position Hierarchy” window.

File Edit View Folder Tools Window **Help**

Position Hierarchy: 16-AUG-2012

Name:   Primary Version Number:

Position

Name:

Position Control Number:  Office Symbol:

Holder:  Holder Emp #:

Person Type:  Number of Subordinates:

Obligated Employee:  Obligated Emp #:

Detailed Employee:  Detailed Emp #:

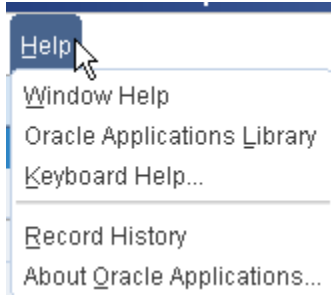
Team Lead:  Supervisor:

Exists In Hierarchy

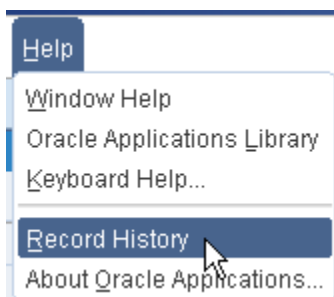
Subordinates

Name	Position Control Number	Office Symbol	Number of Subordinates	Down	Holder Name	Emp #
Civil Engineer.GS03.WW0M148.005.005699.C	005699	WPCB	0	↓	Hudson-Boyd, Christopher	24843
Civil Engineer.GS03.WW29580.133.004250.C	004250	WPCB	0	↓	Vaughn, Robert C	20814
General Engineer.GS03.WW0M148.008.008088.C	008088	WPCB	0	↓	Scarlett, Nadiyah A.	26104

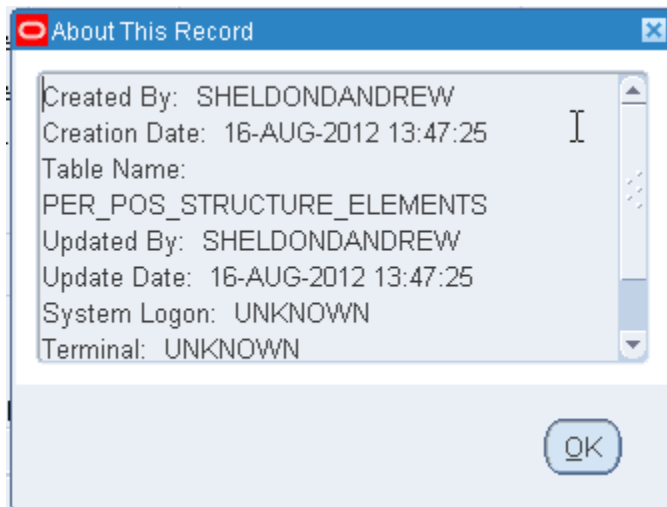
A drop down list appears.



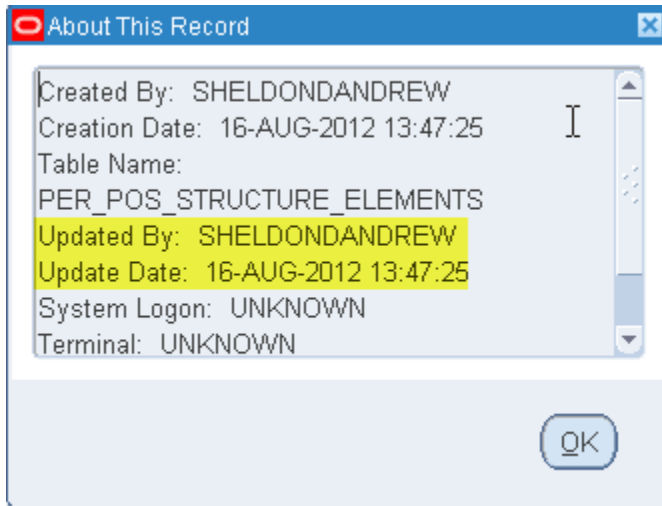
**Step 5 – Select “Record History”.**



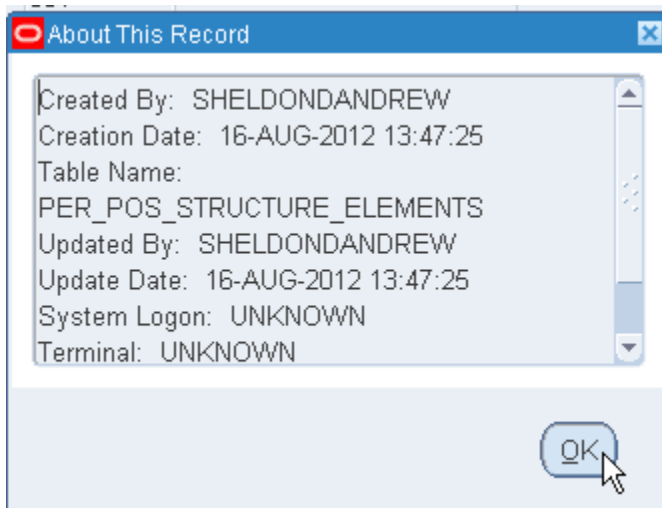
An **“About this Record”** window opens.



**Step 6** – Look at the “**Updated By**” and “**Update Date**” to see who last modified the record.



**Step 7** – To close the “**About This Record**” window, click the “**OK**”  button.



You're returned to the "Position Hierarchy" screen.

Position Hierarchy: 16-AUG-2012

Name:   Primary Version Number:

**Position**

Name:

Position Control Number:  Office Symbol:

Holder:  Holder Emp #:

Person Type:  Number of Subordinates:

Obligated Employee:  Obligated Emp #:

Detailed Employee:  Detailed Emp #:


Team Lead:  Supervisor:

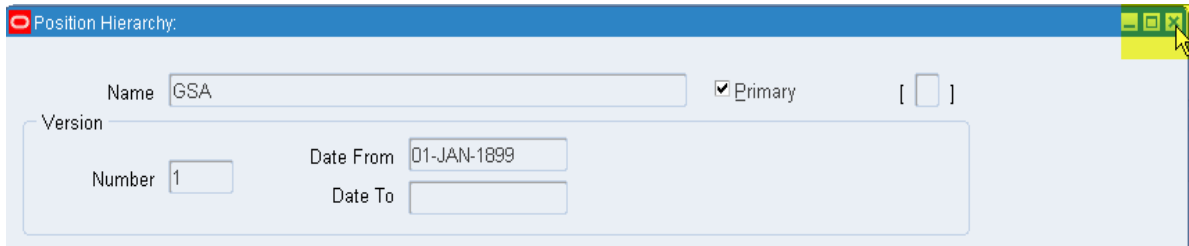
Exists In Hierarchy

**Subordinates**

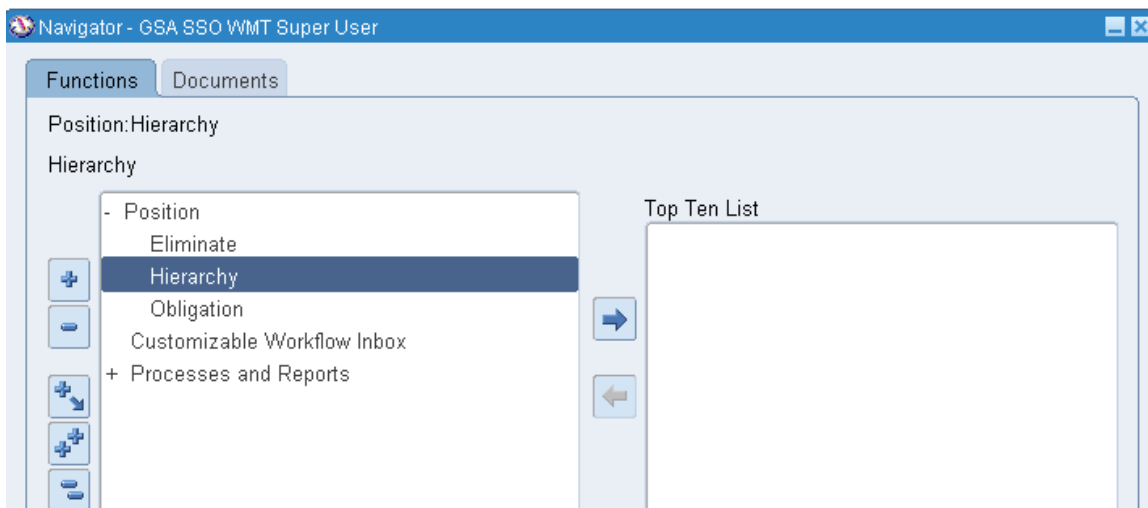
Name	Position Control Number	Office Symbol	Number of Subordinates	Holder Name	Holder Emp #
<input type="text" value="Civil Engineer.GS03.WW0M148.005.005699.C"/>	<input type="text" value="005699"/>	<input type="text" value="WPCB"/>	<input type="text" value="0"/>	<input type="text" value="Hudson-Boyd, Christopher"/>	<input type="text" value="24843"/>
<input type="text" value="Civil Engineer.GS03.WW29580.133.004250.C"/>	<input type="text" value="004250"/>	<input type="text" value="WPCB"/>	<input type="text" value="0"/>	<input type="text" value="Vaughn, Robert C"/>	<input type="text" value="20814"/>
<input type="text" value="General Engineer.GS03.WW0M148.008.008088.C"/>	<input type="text" value="008088"/>	<input type="text" value="WPCB"/>	<input type="text" value="0"/>	<input type="text" value="Scarlett, Nadiyah A."/>	<input type="text" value="26104"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>


# Closing the Position Hierarchy Window and Logging Out of CHRIS

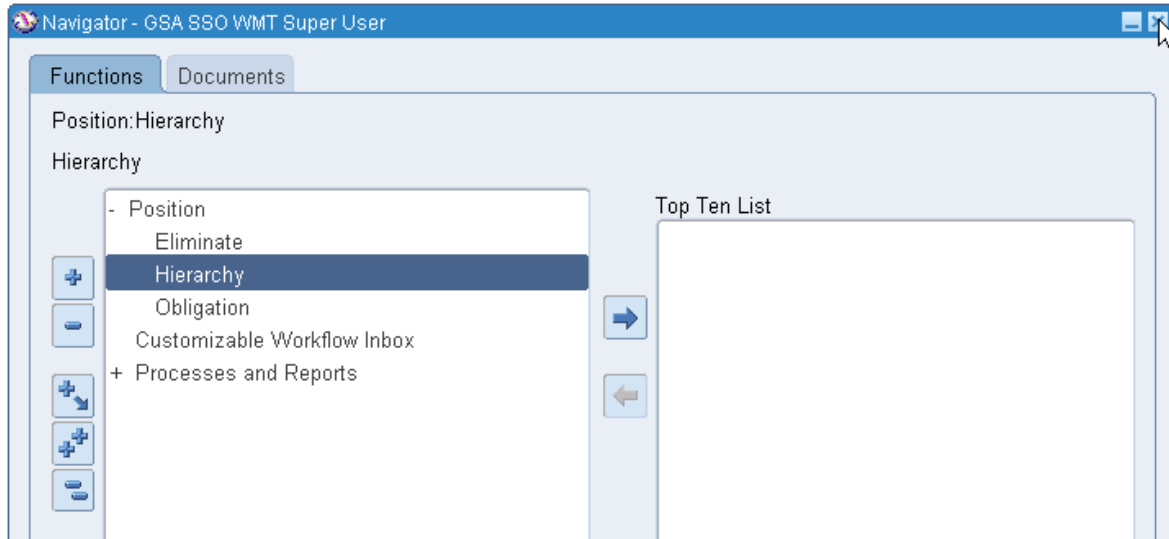
**Step 1** - To close the “Position Hierarchy” window, click on the “x”  in the upper right corner of the window.



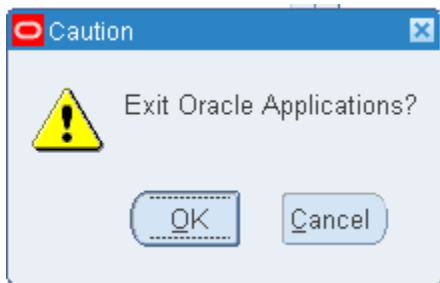
It will return you to the “Navigator” window.



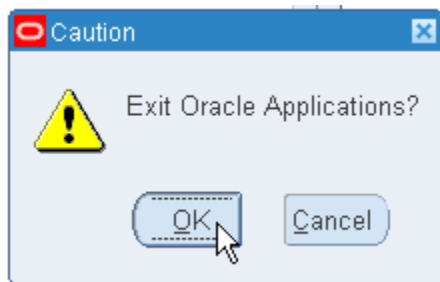
**Step 2** - To close the “Navigator” window, click on the “x”  in the upper right corner of the window.




A “Caution” window will appear.

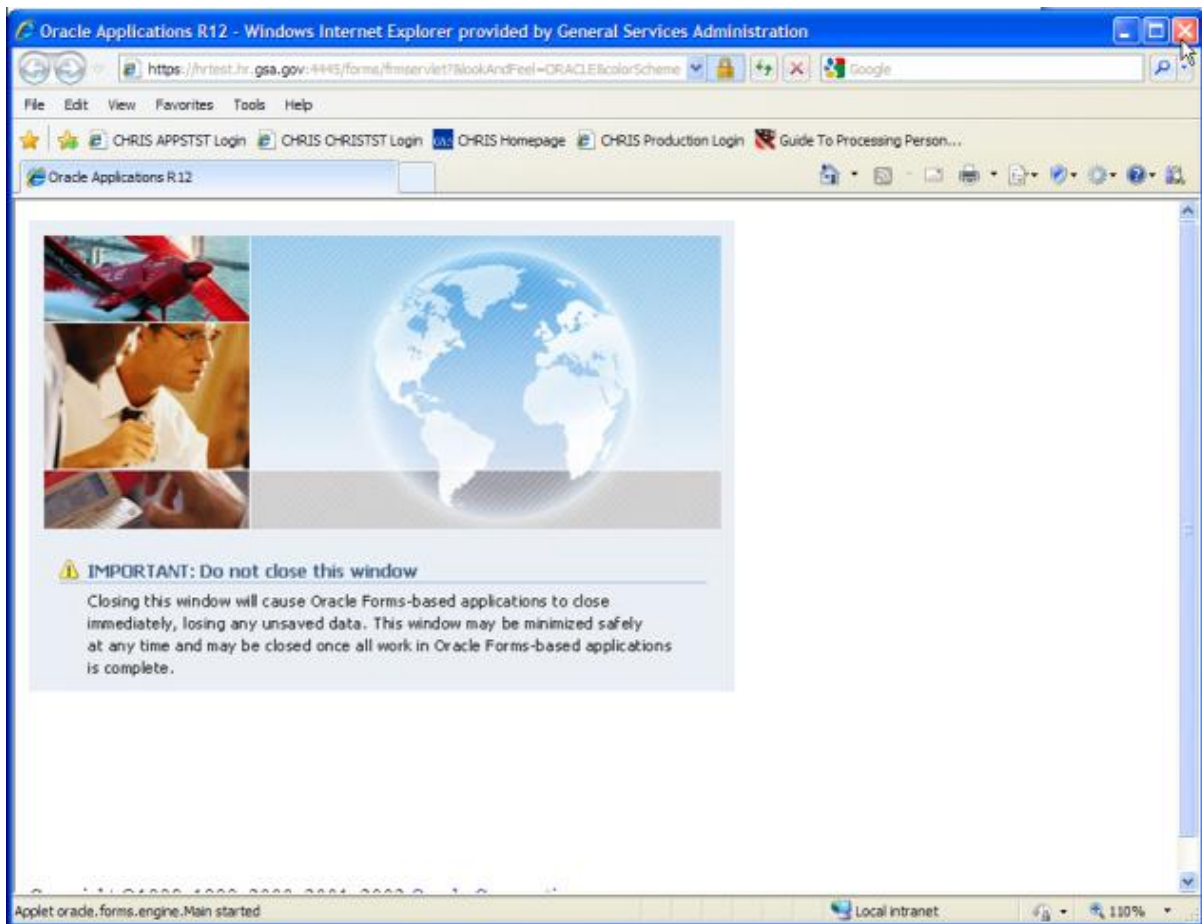


**Step 3** - Click the “OK”  button.





**Step 4** – To close the remaining Oracle windows, click on the “x”  in the upper right corner of each window.



**Step 5** – Click “Logout” to logout of CHRIS.

