

## Guide for Creating Position Listings and Projecting Positions

This guide provides instructions which will be used to create a position listing needed for the annual department budget submission. Included in these instructions is how to export data to Excel and how to project position budgets for the current year.

To download Position information for projections

**Step 1: Step 1: Log on to Cal Poly Pomona Oracle PeopleSoft Enterprise System :**  
<https://cmsfin.cms.csupomona.edu/psp/FPOMPRD/>

**Step 2:** Click on Position Lookup

The screenshot shows the 'CAL POLY POMONA' header and a 'Menu' on the left. The 'Finance' section is expanded, showing various links. The 'HR' section is highlighted with a red box, and a red arrow points to the 'Position Lookup' link. A text box on the right says: 'Welcome to the Finance WebTools! If you have any questions regarding the data or the tools, please e-mail the support staff at [fw\\_t\\_support@mailman.csupomona.edu](mailto:fw_t_support@mailman.csupomona.edu).'

## Results

The screenshot shows the 'Position Lookup Result' page. On the left, there is a search form with fields for 'Dept Id:' and 'Job Code:', and a 'Submit' button. On the right, there is a table with the following columns: Position#, Job Code, Description, EmplID, Name, Rate of Pay, Distr%, Account Code, and RU. The table shows one row with a search icon in the 'Rate of Pay' column and the value '0.00' in the 'Distr%' column. The table also has a 'First' button and '1 of 1' in the top right corner.

**Step 3:** Enter Department Id and click on Submit .

**Results**

**Position Lookup Result**

Dept Id:

Job Code:

Enter Dept Id and click on Submit button

Position#	Job Code	Description	EmpID	Name	Rate of Pay	Distr%	Account Code	RU
					0.00			

**Results**

**Position Lookup Result**

Dept Id: 67700

Job Code: %

Position#	Job Code	Description	EmpID	Name	Rate of Pay	Distr%	Account Code	RU
00002218	1870	Student Assistant		Various	0.00	100%	9XXXX-POM01601303000000602	9XX
00003536	1871	Stdnt Trnee,On-Cmps Wrk Stdy		Various	0.00	25%	9XXXX-POM01602001000000602	9XX
00002357	1874	Brdg Student Assistant		Currently Vacant	0.00	100%	9XXXX-POM01601303000000602	9XX
00001285	1038	Admin Analyst/Spclst EI-12 Mo	*****1551	Bronco Billy	5097.00	100%	9XXXX-POM0160130000000602	9XX
00001292	1038	Admin Analyst/Spclst EII-12Mo	*****1149	Micky Mouse	4631.00	100%	9XXXX-POM0160130000000602	9XX
00001295	1038	Admin Analyst/Spclst EIII-12Mo	*****5097	Minnie Mouse	5888.00	100%	9XXXX-PRA0160130000001100	9XX
00002035	1038	Admin Analyst/Spclst EIII-12 M	*****7581	Donald Duck	3091.50	100%	9XXXX-POM0160130000000602	9XX

**Step 4:** To Export Data to Excel click on Download icon located on upper right hand corner of result screen.

**Position Lookup Result**

Dept Id: 67700

Job Code: %

Download to Excel icon

Position#	Job Code	Description	EmpID	Name	Rate of Pay	Distr%	Account Code	RU
00002218	1870	Student Assistant		Various	0.00	100%	9XXXX-POM01601303000000602	9XX
00003536	1871	Stdnt Trnee,On-Cmps Wrk Stdy		Various	0.00	25%	9XXXX-POM01602001000000602	9XX
00002357	1874	Brdg Student Assistant		Currently Vacant	0.00	100%	9XXXX-POM01601303000000602	9XX
00001285	1038	Admin Analyst/Spclst EI-12 Mo	*****1551	Bronco Billy	5097.00	100%	9XXXX-POM0160130000000602	9XX
00001292	1038	Admin Analyst/Spclst EII-12Mo	*****1149	Micky Mouse	4631.00	100%	9XXXX-POM0160130000000602	9XX
00001295	1038	Admin Analyst/Spclst EIII-12Mo	*****5097	Minnie Mouse	5888.00	100%	9XXXX-PRA0160130000001100	9XX
00002035	1038	Admin Analyst/Spclst EIII-12 M	*****7581	Donald Duck	3091.50	100%	9XXXX-POM0160130000000602	9XX

## Results

	A	B	C	D	E	F	G	H	I	J
1	Position#	Job Code	Description	EmplID	Name		Rate of Pay	Distr%	Account Code	RU
2										
3	8	1870	Assistant		us		0	100%	POM01	X
4	6	1871	Trnee,On-		us		0	25%	POM01	X
5	7	1874	Student		us		0	100%	UE0016	X
6	6	1038	Analyst/Sp	1551	o Billy		5097	100%	POM01	X
7	2	1038	Analyst/Sp	1149	y		4631	100%	POM01	X
8	5	1038	Analyst/Sp	5097	e		5888	100%	POM01	X
9	7	1038	Analyst/Sp	7581	d		3091.5	100%	POM01	X

**Step 5:** Adjust column widths

## Results

	A	B	C	D	E	F	G	H	I	J
1	Position#	Job Code	Description	EmplID	Name		Rate of Pay	Distr%	Account Code	RU
2										
3	00002218	1870	Student Assistant		Various		0	100%	9XX00-POM0160130300000602	9XX
4	00003536	1871	Stdnt Trnee,On-Cmps Wrk Stdy		Various		0	25%	9XX00-POM0160200100000602	9XX
5	00002357	1874	Brdg Student Assistant		Various		0	100%	9XX00-UE00160130350200602	9XX
6	00003456	1038	Admin Analyst/Spclst EI-12 Mo	*****1551	Bronco Billy		5097	100%	9XX00-POM0160130000000602	9XX
7	00001292	1038	Admin Analyst/Spclst EI-12 Mo	*****1149	Mickey Mouse		4631	100%	9XX00-POM0160130000000602	9XX
8	00001285	1038	Admin Analyst/Spclst EI-12 Mo	*****5097	Minnie Mouse		5888	100%	9XX00-POM0160130000000602	9XX
9	00003917	1038	Admin Analyst/Spclst III-12 Mo	*****7581	Donald Duck		3092	100%	9XX00-POM0160130000000602	9XX
10										

**Step 6:** Sort and total by account code

**Step 7:** Add a column to project annual salary

To project annual salary, multiply rate of pay times 12 unless there are known changes (change in employee, timebase change, leave without pay etc.)

**Step 8:** Totals for account code should be entered on the Budget Journal Import Template. The account code should be changed to the equivalent chartfield string before entering summary information on template. (See Guide to How to Prepare Budget Submission)

Account Code Sample:

DeptID Fund Account Class Prog  
67700 – POM01 601300 0000 0602

Chartfield String Sample:

Account Fund DeptID Prog Class  
601300 POM01 67700 0602 00000