Training Guide
Position Management

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Position Management

To Access the Position Management Module, Click the Main Menu button and select the Position Management option. This module includes the position description and, for unclassified positions, it includes the request for authorization to hire (PER 1).

Position Management maintains position descriptions on classified, unclassified, and faculty positions. In the Position Management and Applicant Tracking modules of PeopleAdmin, faculty positions with administrative duties are included in the “Unclassified” grouping because these use a similar hiring process. These are the positions that required a PER 1. At launch of PeopleAdmin in November 2019, we will only be using the Position Management module for these “Unclassified” roles, including Administrative Faculty.

From this screen, any user can view position descriptions within their span of control by clicking the classification type. The “… Position Request” options displays the current status/step of positions which have an open or completed action.

Individuals with Initiator, Department Approver, or Human Resource roles may also modify existing position descriptions and create new ones. When creating new positions, the initiator can either clone an existing position with similar attributes or create from a blank screen. For any changes to the position description, the user will be asked to provide what action is being requested and a justification. This will replace the justification memo for filling positions or creating new ones.
Parts of the Position Description

The Position Description is comprised of the following sections:

- Position Justification
- Position Information
- Duties and Responsibilities
- Physical and Mental Requirements
- Budget Information
- Incumbent
- Position Reports To
- Position Documents
- Position Request Summary

General Notes on PeopleAdmin
- Moving from screen to screen with the Next button will save your work. Hit the Save button if you need to log off the system or walk away before completing a screen.
- All fields denoted with an asterisk (*) are required fields.
- Once positions are created, changes to the position summary, duties, and qualifications cannot be updated without going through the approvals again.
Modify Existing Unclassified Position Description

This action may be initiated to update job duties for an existing position, request a re-evaluation of a position, or to replace an open position.

1. Click the **Position Descriptions** link.

2. Click the employee group link, for example “Unclassified”.

3. Enter the position title, position number, or incumbent name into the **Search Keyword** field.

4. Click the **Search** button.

5. Click the **Functional Position Title** for the position you wish to modify from the list.
6. Click the **Modify Position Description** link.

7. Click the **Start** button.

8. Click the **Action Requested** option.
9. Enter the rationale into the **Justification of Need** field. Click the **Next** button.

10. Review the **Position Information** and update as necessary. Required fields contain a red *.* Appointment Type and Location City do not feed from PeopleSoft so will need to be added for each position. Attention should be paid to these fields:
   - The Position Summary on this page will feed directly to the job posting so it is imperative that you review the content as well as spelling and grammar.
   - Initiator Access will allow someone else to update the position description in the event you are not available for updates.

11. Review the **Duties and Responsibilities** tab for any updates. The total percent of time should equal 100% when the additional duties are included.

12. **Physical and Mental Requirements** are preset to minimally and will need to be input as positions are updated.

13. The **Budget Information** can be entered into the form on the page by clicking the **Add Budget Information** buttons. If multiple budget sources are required or for convenience, a “Funding Source Template” spreadsheet similar to the old PER 1 is available to be completed and uploaded later under **Position Documents**.

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**Budget Information**

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**Check spelling**

- **Budget Information - Base**
  - **Funding Source Template**
  - Add Budget Information - Base Entry

- **Budget Information - Supplement**
  - Add Budget Information - Supplement Entry

**Salary Information**

- **Incumbent Salary**
- **Budgeted Salary**

Budget information can be added by either using the Funding Source Template or by clicking the **Add Budget Information - Base Entry** button. This information is not always readily available, and can be added later in the workflow process.

Enter the current or prior incumbent’s salary here. If the Initiator has **Budget Salary** information available, it will be entered here.
14. If using the Funding Source Template, this file should be completed similar to the old PER 1. This file does the calculations. Once completing it, the excel file should be saved to your computer to be uploaded later.

15. The Incumbent and Position Reports To tabs should not be updated. Incumbent and position data feeds from PeopleSoft to PeopleAdmin each night. If a change to the supervisor is required, contact HR or include that in the notes when the position is submitted.

16. Under Position Documents, upload a current organizational chart that includes at least a level above, peers, and a level below the current position. If you have chosen this option for the budget information, upload the funding source spreadsheet. Any other relevant documents may also be attached here.

17. Review the request on the Position Request Summary page.

A green check indicates all required fields are complete.

An orange circle with exclamation point indicates something needs attention.

To make changes click on the Edit link.
18. Click to the link and select to submit to the next level approver. Click the Submit button.

19. If any required fields were omitted, you will receive a pink band across the top of the screen notifying you of what updates are required. Go back to that section using the edit button above that section of the summary.

20. If the request was completed successfully, a pop up window will provide you an opportunity to add comments, which will be included in the email. Any comments will be saved in the position history. Click Submit to send to the next level.
21. Once submitted, you will receive a blue band notifying you it has been transitioned.

22. You can follow the progress of the position approvals through the Unclassified Position Request option.

23. Clicking on the position, then History, you can see where it went and when each step approved.
Clone Existing Unclassified Position Description

This action may be initiated to create a new position similar to an existing position. From an existing position description within your access, you can copy or ‘clone’ that position description. This will pull in pertinent information from the ‘cloned’ position description into this action and allow for edits. As an example, the work in the group has increased and leadership is requesting another Research Associate 1 position. If the position you want to duplicate is not within your span of control, contact the Compensation department for assistance.

1. Click the Position Descriptions link.
2. Click the employee group link, for example “Unclassified”.
3. Click the Create New Position Description link.
4. When cloning a position, leave the title and organizational information blank.
5. Use the Search feature or select a position to clone from the list. Click the circle next to the position.

**Clone an existing Position Description?**

<table>
<thead>
<tr>
<th>Functional Position Title</th>
<th>Position Number</th>
<th>Last Name</th>
<th>First Name</th>
<th>Super</th>
</tr>
</thead>
<tbody>
<tr>
<td>RESEARCH ASSOCIATE 1</td>
<td>00023113</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RESEARCH ASSOCIATE 2</td>
<td>00022043</td>
<td></td>
<td></td>
<td>ASSOC (Liz Sir)</td>
</tr>
<tr>
<td>RESEARCH ASSOCIATE 1</td>
<td>00022158</td>
<td></td>
<td></td>
<td>ASSOC (Liz Sir)</td>
</tr>
</tbody>
</table>
6. Click the **Start Position Request** button.

7. Under **Position Justification**, select the **Action Requested** option. Cloning is used when creating and fill new position.

8. Enter the rationale into the **Justification of Need** field.

9. Click Next to move to the next screen.

10. In the **Position Information Section**, since we are creating a new position, you will enter **TBD** in the **Position Number** field.

11. Verify or make appropriate changes to all fields.

12. Click Next to move to **Duties and Responsibilities**. The information displayed is the same information from the existing position that you are cloning. Changes can be made as necessary. Click the **Next >>** button.

13. Update the **Physical and Mental Requirements** section. When considering the physical effort required for a job, focus on the duties. Click the **Next >>** button.

14. The Budget Information page will need to be input on the screen or can be uploaded using the Funding Source Spreadsheet. Click the **Next >>** button.

15. Skip the Incumbent page.

16. On the **Position Reports To** page, you will select the position the position you are creating will report. Click the **Next >>** button.
18. The **Position Documents** page will display. The Organizational Chart is required. If you elect to include the funding source by spreadsheet, this is where that document should be uploaded.

19. To attach the Organizational Chart file in Position Documents, click on Actions for the drop-down menu options. Click the **Upload New** link.

20. Enter the information into the **Description** field. Click the **Browse** button to select the file.

21. Click the **Open** button.

22. Click the **Submit** button.

23. Once you have attached all of the necessary documents, Click the **Next >>** button.

24. The **New Position Description** screen for the position you cloned will display. If all information has been input correctly, the position is ready to move on to the Department Approver.
25. Hover over the **Take Action On Position Request** button and click the **desired** link.

26. You may enter comments into the field if desired, but they are not required.

27. Click the **Submit** button.
Create New Unclassified Position Description

When a new position, unlike any existing position, is needed, the initiator will start from a blank template to create a new position description.

1. Click the **Position Descriptions** link.

2. Position Descriptions

3. Click the employee group link, for example “Unclassified”.

4. Click the **Create New Position Description** button in the upper right corner.

5. Enter the desired **Functional Position Title** * into the field.

6. The Organizational Unit information will default onto the page based on your user access. If you have responsibilities for more than one department, you will then select from the drop down list.

7. Click the **Start Position Request** button.
8. In the **Position Justification Section**, Click the appropriate box for the **Action Requested**.

9. Enter the rationale for the new position into the **Justification of Need** field. This replaces the Justification Memo previously required.

10. Click the **Next >>** button to move to the next screen.
11. Complete the **Position Information Section** with the basic demographic data about the position you are creating.

- **Position Information**

  - **Position Number**
    - The Position Number will be assigned by the system later in the process if you are creating a new position description. Enter "TBD" when creating a new position description.

  - **FTE**
    - If the position is a 40 hour per week position, the FTE = 1. If the position is less than 40, the FTE is the position's hours per week divided by 40. It should be entered in decimal format (e.g., 0.25, 0.5, etc.)

  - **Appointment Type**
    - Please select
    - This field is required.

  - **Location Code**
    - Please select
    - This field is required.

  - **Location City**
    - Please select
    - This field is required.

  - **Department**
    - Human Resource Management

  - **School/Division**
    - Human Resource Management

  - **Business Sector**
    - Please select
    - This field is required.

  - **No. of Direct Reports to this Position**
    - Please select
    - This field is required.

  - **No. of Indirect Reports to this Position**
    - This field is required.

  - **FLSA**
    - Please select

  - **Position Summary**
    - The Position Summary should be a few sentences, which describes the major purpose of the position.
    - **NOTE:** This summary is used in position postings.

  - **Initiator Access**
    - The Initiator Access field is an optional field where you can add the names of those people you wish to grant access to the Position Description (PD). No names are required to be added, but then no one else will be able to access the PD as initiator while it is in the approval process.
    - **NOTE:** An example of where this may be used is if you create a new position which will be routed while you are out of the office, assigning a second imitator access will allow that person to make changes to the PD while you’re out of the office. You may select as many options as you desire from the list.
12. The Minimum and Preferred Qualifications for the position are next.

**Minimum Qualifications** are those attributes a candidate must possess to be considered for the position. Information listed here will be used to **screen out** applicants from consideration for employment.

Minimum Qualifications

<table>
<thead>
<tr>
<th>Required Education</th>
<th>This field is required.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required Education: Check the minimum level of education required or acceptable.</td>
<td></td>
</tr>
<tr>
<td>If Other Required Education, please specify</td>
<td></td>
</tr>
<tr>
<td>Discipline(s)</td>
<td>Leave blank if degree field is not specific. Add &quot;OR RELATED&quot; to specific field(s) of study to maximize applicants.</td>
</tr>
<tr>
<td>Certifications/Licenses Required</td>
<td></td>
</tr>
<tr>
<td>Indicate the minimum number of years required to perform the job</td>
<td>This field is required.</td>
</tr>
<tr>
<td>Indicate the type of experience required to perform the job</td>
<td>This field is required.</td>
</tr>
</tbody>
</table>

If substitution for the degree, discipline, certification, and/or years experience can substitute, list specifically how this can be applied. As examples, “A Master’s degree can substitute for 2 years’ experience” or “Three additional years of work experience in accounting can substitute if the Bachelor’s degree is in another discipline.”

The Required Knowledge Skills & Abilities (KSAs) are measurable, realistic, minimum qualifications the applicant must possess to be considered for the position. Listing too many KSAs may limit your applicant pool, while listing too few may result in a very large applicant pool. Generally, up to 10 KSAs may be listed.

12. Similar fields are available for Preferred Qualifications. These are not required but candidates with the preferred qualifications may be given special consideration.
13. The next section is **Duties and Responsibilities**. Enter up to ten duties and responsibilities with each accounting for between 5% and 40% of effort.

14. Click the **Add Duties and Responsibilities Entry** button.

15. **Physical and Mental Requirements Section** focus on what is needed to get the job accomplished. Use the drop down arrow to update from the preset minimally.

16. Scroll down the page you will find the **Essential Skills for Lab and Clinical** section. This section will primarily be utilized for those positions pertaining to labs or clinics if applicable.
18. Next complete the **Budget Information Section**. As an alternative to entering the data on this screen, the department can complete a Funding Source Spreadsheet and attach it later in the **Position Documents** Section.

![Budget Information Section](image)

Budget information can be added by clicking the **Add Budget Information - Base Entry** button. This information is not always readily available, and can be added later in the workflow process. If it is available, the Initiator will enter it here.

19. The **Incumbent** screen will display next. This should be left with the message that “This position description is vacant.”

20. Next is the **Position Reports To** Section. You will select the **Functional Position Title** and employee the new position will report to. A list of active **Position Titles with Position Number and Incumbent** displays. If the correct Functional Position Title is not displayed, you can search for it using the **Position Descriptions - Filter these results** link.

21. Under the **Position Documents** Section, you should upload related documents.

22. Hover over the **Action** link to upload the **Organizational Chart**. This is required for all new positions. The organizational chart should contain at least what position this will report to, what other positions report to that leader, and which positions report into the new position.
23. The Funding Sources spreadsheet would be uploaded on this page if you elect not to enter the data on the Budget Information page.

24. Once all the information is input, you reach the Position Request Summary Section.

The New Position Description: with a Current Status: Draft displays in the window. Each section of the position description has an Edit link allowing you to make changes if needed. If no changes are required, you can move the position description forward in the workflow process.

25. For new positions which have not been graded by compensation, the initiator can save the description in this state and notify compensation to begin an evaluation. This will allow the pay range to be finalized before budget and dean approval is obtained. Eliminating the need to go back for approvals if the salary range is changed.
26. **NOTE:** Make sure that all information on the position description is complete, with the possible exception of Budget and Compensation, before initiating the approval process.

27. To take action, hover over the Take Action On Position Request button at the top right hand corner of the page and select one of the following:

   ![Take Action On Position Request](image)

   **NOTE:** Please note, to save this request and submit later, please select ‘Keep working on this Position Request’. If there are additional approvers within the department, you will need to select the appropriate action per the workflow.

28. You will receive a pop up window ‘Take Action’ which will send an email in Outlook to the next approver to notify them they have an action pending. Please note, comments will be tied to the historical record of this action.

29. Click the Submit button.

30. If any required fields were omitted, you will receive a pink band across the top of the screen notifying you of what updates are required. Go back to that section using the edit button above that section of the summary.

32. If the position was completed, a message display in the top left corner of the page that the Position Request was successfully transitioned.'
Approve a Position Description

You will receive an email, notifying you that a position description needs your approval. If you have multiple roles, you will want to note in the email what type of action needs your attention along with the position title.

Click the **Main Menu** button. (The three dots in the upper left corner)

Click the **Position Management** button.

The default **User Group** is **Employee**. You will need to change this to “**Department Approver**” or the appropriate approver level you have been assigned.

Use the down arrow next to **Position Description** and Click **Unclassified Position Requests** option.
From the list of active position request, click on the title of one with your role in the Workflow State.

Before approving the position description, you must read through it and make sure that no additions or modifications are necessary. If the initiator modified an existing position, you will note on the summary in grey what the current position description reads. In this case the initiator changed the number of Direct reports from 4 to 6.

If you find something needing to be changed, each section has an **Edit** feature that will allow you to make changes within that section.

You have the ability to make changes or to send it back to this Initiator to make changes.

**NOTE:** You must click the Save button to save any additions or modifications made to a section.
Click the **Take Action On Position Request** button.

The *Workflow Actions* will display. The position description can be moved forward or backward through the process depending on what actions or modifications were taken or need to be taken. For this example, the position description will move forward through the process to Budget.

Click the **Submit (move to Budget)** link.

Comments may be added in the Comments box, but are not required.

Click the **Submit** button.

A message will display at the top of the page 'Position request was successfully transitioned.'
View Status of Position Description

Click the **Main Menu** button. (three dots on upper left)

Click the **Position Management** button.

Select the appropriate **User Group**: from the list.

Click the **Position Descriptions** link.

Click the **Unclassified Position Requests** link.

Enter the desired title into the **Search Keyword** field.

Click the **Search** button.

The Workflow Status will let you know where it is in the process.

To view the current description, hover over the **Actions** link and click **View**.
Faculty and Classified Position Descriptions

Faculty Positions

Administrative Faculty positions are listed under “Unclassified Positions” because they are recruited for using full position descriptions.

Other Faculty positions are filled using posting templates on the Hire module. Faculty positions in PeopleAdmin have minimal information under the Position Description tab. This information comes over from PeopleSoft in nightly feeds so there is no need to do any input for Faculty Position Descriptions.

Classified Positions

We are not currently using PeopleAdmin for Classified Position Descriptions or Hiring so while there is some basic information in the system, much of it is not being maintained.