Position Management

Instructional or Executive Position Descriptions

COLLEGE OF WILLIAM AND MARY

Human Resources

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Create a New Position Description
Instructional or Executive

Login to PeopleAdmin at https://jobs.wm.edu/hr. Select the Position Management module by hovering over the Applicant Tracking heading located at the top right hand section of the screen. The heading of page will turn to orange.

To start the process, hover over Position Description on the Navigation Bar and select the type of position to be created → Staff/PPF or → Instructional/Executive.

Note: The Staff/PPF and Instructional/Executive Actions choices display positions with current actions in progress.

Select Create New Position Description
Click on **New PD Action: Instructional Faculty & Executive**

New positions can either be **cloned (copied)** from an existing position description or created from **scratch**.

**To create a new position by cloning (copying) an existing position:**

Identify the position to be cloned (copied) from the list of Approved Position Descriptions at the bottom of the screen. Review the position description to ensure it is accurate by hovering over the Actions button and choose View. Use the back button on your browser to return to the previous screen.

To clone the position, click the radio button next to the selected position description and click on the **Start Action** button in the top right section. **NOTE:** The fields on the new position will pre-populate with all the information from the existing position (except the position number) and can be edited as needed.
To create a new position from scratch:

Enter the Working title in the **Position Title** field. Select the **Department/Banner Orgn** from the drop-down list. Click on the **Start Action** button in the top right section.
Classification Details

You may skip this step if you do not know the role title, or, you may propose and select a role title by scrolling through the list of Role Titles or creating a filtered search. To create a filtered search click on “Filter these results” and a feature box will pop-up to enter criteria. The role title will default for cloned positions. Note: The final determination of Role Titles is based on a classification/compensation review by Human Resources.

To view details about the role title, hover over the Actions and choose View Role Title.

Click the radio button next to the selected Role Title and click the Next >> button in the top right corner to go to the Position Details tab.
Position Details

Complete all required information that did not default from Classification Details and use buttons to continue to the Supervisory tab.

Your name will auto populate but Multiple Hiring Officials can be added at the time of creation.

The auto number is system generated for tracking purposes.
Supervisory Position

Select the Supervisory Position from the list of Approved Position Descriptions and use buttons to continue the Budget Information Tab.
Budget Information

Complete all required information that did not default.

Date you request position description to be effective. This is not the date position description receives final approval from Compensation.

A Minimum of ONE Entry is Required

- Index
- Account
- Percent

The Index, Account, Percent must be completed accurately before you can move to next tab.

This is a builder form which allows you to add additional funding sources by clicking on “Add Banner Funding Source Entry” button.

use **Next>>** buttons to continue to the **Internal Documents** tab.
Internal Documents

Updated organization charts are required for all position actions. Other documents may also be attached, i.e., relevant memos, position budget justification, etc. To attach a document, hover the cursor over the Actions button next to the document type.

The following drop down choices will appear for you to select.

Select **Upload New** to upload a document from your files. Click on submit. All uploaded files must be converted to PDF and you should see a message “PDF Complete” when the files have successfully uploaded.
Select **Create New** to open the system format editor to create a document. Once you are finished click on Submit then Confirm.

Select **Choose Existing** to link a document that was previously attached by selecting the document from the list, then click on Submit then Confirm.

**Your Previously Uploaded Documents**

A list of documents previously uploaded will appear here.
Action Summary

The Action Summary Tab provides the opportunity to review the position request and make any changes before submitting it for further approval. The top section provides information about the action, i.e. current status, position type, who created the action and the owner, etc.

To initiate the approval queue, hover over the button and chose from the list of available actions.

Once the Action is selected, a comment box will appear and a comment may be added that will be incorporated into the e-mail notification sent to the next approver. Please keep in mind these comments will become part of the position record and cannot be removed.

If you want to monitor the progress and easily access it later, add the action to your watch list. You will be able to view it quickly from your home screen. Select Submit.

Note: You have the ability to add this action to your watch list by checking the box located in the Comment section.
Information messages will appear at the top of the screen to let you know your action has been routed to your selected approver or to alert you to an error. Successful transitioned messages appear in Green and Error messages appear in Red.
Update/Reclassify an Existing Position

Login to PeopleAdmin at https://jobs.wm.edu/hr. Select the Position Management module by hovering over the Applicant Tracking heading located at the top right hand section of the screen. The heading of page will turn to orange.

To start the process, hover over Position Description on the Navigation Bar and select the type of position to be updated or reclassified → Staff/PPF or → Instructional/Executive.

Note: The Staff/PPF and Instructional/Executive Actions choices display positions with current actions in progress.

Hover over the Action Link on the right of the position you want to modify then click on View. Click on Update/Reclassify Existing Staff/PPF Position Description to start the modification action.

A confirmation screen will pop-up to notify you that the once you start this type of action, the position description will be locked from other updates. Click Start to continue the process.
Classification Details

To request a change in the Role Title click the radio button next to the proposed Role Title and click Next.

To view the Role Title hover over the Actions and choose View Role Title.
Position Details

The current incumbent information will default under the Employee Information section.

Select the reason for the action that apply under the Action Type by clicking in the check box.

Update the other fields as appropriate and use the buttons to continue the Supervisory tab.
Supervisory Position

If there is a change in Supervisory Position, select the appropriate Supervisory Position. Use buttons to continue to the Budget Information tab.
Budget Information

Complete all required information and scroll down the form to the Banner Funding. Use buttons to continue to the **Internal Documents** tab.

* The Index, Account, Percent must be completed before you can move to next tab.

* This is a builder form which allows you to add additional funding sources by clicking on “Add Banner Funding Source Entry” button.
Internal Documents

Updated organizational charts are required for all position actions. Other documents may also be attached, i.e., relevant memos, position budget justification, etc. To attach a document, hover the cursor over the Actions button next to the document type.

The following drop down choices will appear for you to select.

Select **Upload New** to upload a document from your files. Click on submit. All uploaded files must be converted to PDF and you should see a message “PDF Complete” when the files have successfully uploaded.
Select **Create New** to open the system format editor to create a document. Once you are finished click on Submit then Confirm.

Select **Choose Existing** to link a document that was previously attached by selecting the document from the list, then click on Submit then Confirm.

**Employee Details**

This tab provides the information for the current employee in the position. If this position is going to be recruited, the new employee’s details will default after the recruitment and hiring proposal has been completed.
**Action Summary**

The Summary Tab provides the opportunity to review the position request and make any changes before submitting it for further approval. The overall Summary shows the Summary, History, and Settings (Posting Settings) in a tab view format.

To move the Position Action along in the process hover on the Take Action on Action button and the appropriate actions will appear available for you to choose.

Once the Action is selected, a comment box will appear and a comment may be added that will be incorporated into the e-mail notification sent to the next approver. Please keep in mind these comments will become part of the position record and cannot be removed.

If you want to keep your monitor the progress and access it easily later, add the action to your watch list. You will be able to view it quickly from your home screen. Select Submit.
Information messages will appear at the top of the screen to let you know your action has been routed to your selected approver or to alert you to an error. Successful transitioned messages appear in Green and error messages appear in Red.

Note: You have the ability to add this Action to your watch list by checking the box located in the Comment section.