Position Management

Staff and Professional Positions:
Create a New Position Description

COLLEGE OF WILLIAM AND MARY

Human Resources

June 2014
Table of Contents

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a New Position Description</td>
<td>2</td>
</tr>
<tr>
<td>Classification Details</td>
<td>5</td>
</tr>
<tr>
<td>Position Details</td>
<td>6</td>
</tr>
<tr>
<td>Job Duties</td>
<td>7</td>
</tr>
<tr>
<td>Physical Demands Form</td>
<td>8</td>
</tr>
<tr>
<td>Supervisory Position</td>
<td>8</td>
</tr>
<tr>
<td>Budget Information</td>
<td>9</td>
</tr>
<tr>
<td>Internal Documents</td>
<td>10</td>
</tr>
<tr>
<td>Action Summary</td>
<td>12</td>
</tr>
<tr>
<td>Work Flow Processes</td>
<td>14</td>
</tr>
</tbody>
</table>
Create a New Position Description

Login to PeopleAdmin at https://jobs.wm.edu/hr. Requests for position changes, modifications, update/reclassify are completed in the orange Position Management side; Requests for postings and hiring proposals are completed in the blue Applicant Tracking side.

Before a posting can be created you must have an approved position description. To begin, select the Position Management module by hovering over the Applicant Tracking heading located at the top right hand section of the screen and select Position Management.

The heading of page will turn to orange.

A “skeleton” or “shell” of your position description (PD) may already be loaded in the system. To start the process and check for an existing PD, 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).

In the search bar, search for the position you want to update and/or recruit for:

Staff/PPF Position Descriptions

[Search bar with search term]
You can expand the search field and/or limit your results by choosing “expand search options.” If you have started to update a position description and saved it, click on “draft” to see your work.

If the position you wish to update is listed, select the button on the left or click on any blue link. All positions active as of November 2012 were loaded into the system. If you do not see the position listed, please contact HR for assistance and we can verify if the PD is loaded and add you as a hiring official.

If you are creating a brand new position, and a skeleton or shell PD is not already loaded, follow the steps below. If the shell of the position description is loaded, follow the instructions to “Update/Reclassify” in a separate guide.

Click Create New Position Description

Click on Create New Position Staff/PPF in the pop up window
New positions can either be cloned (copied) from an existing position description or created from scratch.

**To create a new position by cloning an existing position:**

Identify the position to be cloned 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 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 button in the top right section. Once you select the position description will be locked for editing.
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 button in the top right corner to go to the Position Details tab. PeopleAdmin will auto save your work each time you click the next button.
Position Details

Complete all required information that did not default from Classification Details.

Your name will auto populate but Multiple Hiring Officials can be added at the time of creation. If a hiring official is not available in the list, please contact HR for assistance.

Brief description of the major duties/overview of the position.

The auto number is system generated for tracking purposes.

Select Next>> to continue to the Job Duties Tab.
Job Duties

Click on the 
[button to enter the specific job duties.

Enter the percentage of time for each job duty and provide a detailed description. Duties must be at least 5% to be listed and considered towards the classification of the position. If the position supervises professional, operational, or classified employees click the Performance Management Duty Link to copy and paste the standard Performance Management description.

Click until all duties have been added. Note: To remove an entry, check the Remove Entry box and click on Save.

After all duties have been added, enter the total percentage, the total must add to 100%. Click to continue to the Physical Demands Form.
Physical Demands Form

Select the applicable type of physical demands, degree of physical demands, visual demands, physical surroundings and hazards to indicate how often it is done (occasionally (O), frequently (F), or constantly (C)) by selecting from the drop-down box. Helpful Hint: Use the arrows on your keyboard to tab through the selection list or “Hot Keys” by entering “O” for occasionally, “F” for frequently or “C” for constantly.

When the Physical Demands has been completed use buttons to continue to the Supervisory Tab.

Supervisory Position

Select the Supervisory Position from the list of Approved Position Descriptions. For faculty/instructional supervisory positions, change the position type to Instructional/Executive.
Use **Next>>** 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.*
Use 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 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.

Note: Only the user that uploaded a document can remove the document. For positions requesting a full class/comp review with request for an in-band adjustment or pay raise, please complete the **Class/Comp Review Form** (available on the PeopleAdmin home page) and upload the completed document.

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.

Use **Next>>** buttons to continue the **Action Summary**.
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 to move the action to the next stage of processing. Do NOT click on an action in your watch list to make changes after you have started routing the action for approval.

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. Red error messages must be corrected before the action can transition to the next step.
WORK FLOW PROCESSES – Create New Staff/PPF Position:

- Hiring Official creates, routes to Level 1 (Department approval)
- Level 1 routes to Level 2 (Division/Dean approval)
- Level 2 routes to Class/Comp Initial Review
- Class/Comp reviews, routes to Provost/VP Administration
- Provost/VP Administration routes to Finance: Budget, OSP, Invest Admin
- Finance routes to Class/Comp Final Review*
- Class/Comp finalizes, moves to Approved PD
- Hiring Official Notified and Employment notified to create a Posting via system generated email.

*Finance has the option to return an action to the hiring official for correction/revisions to budget and accounting information.