

# Position Management

**Creating a new position or  
updating an existing description**

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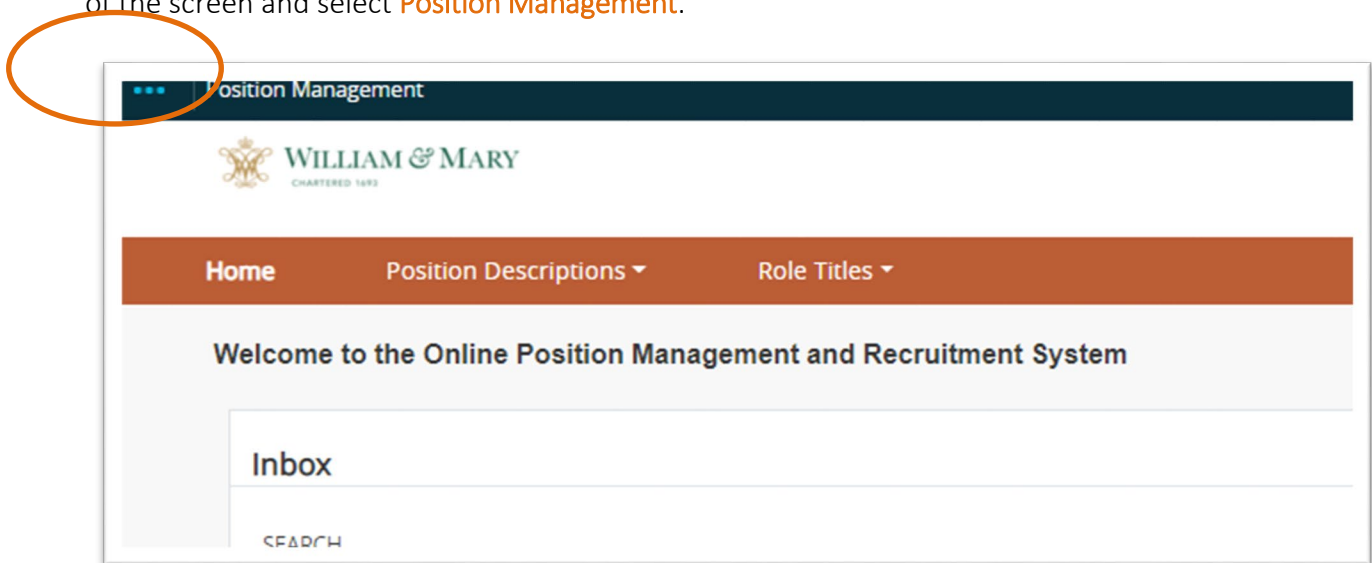
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## Create a New Position Description

Login to PeopleAdmin at <https://jobs.wm.edu/hr>; use your W&M credentials at the Single Sign On Link, not the guest user access.

Requests for position changes, modifications, and update/reclassify are completed in the **orange position management** side; Requests for postings and hiring proposals are completed in the **blue applicant tracking** side.

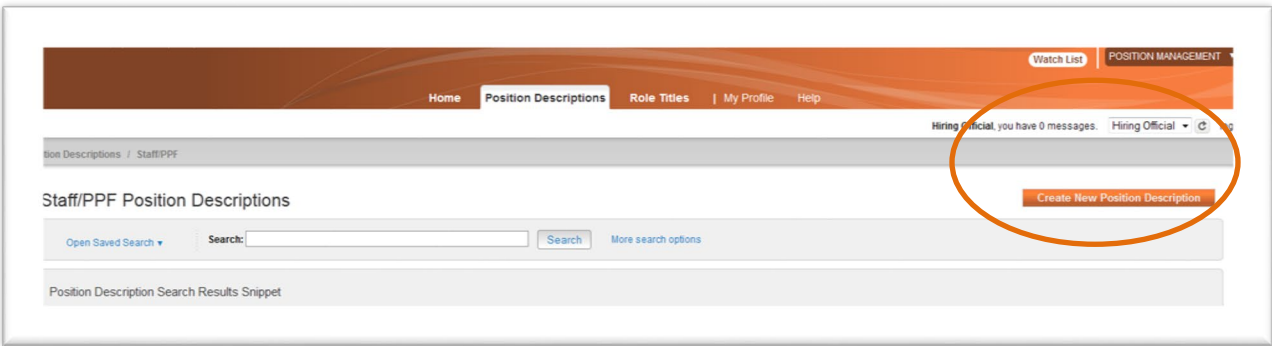
Before a posting can be created, you must have an approved position description. To begin, select the **Position Management** module by hovering over the three blue dots in the upper left corner of the screen and select **Position Management**.



The heading of page will turn to orange.

- If you are creating a brand new position, and a skeleton or shell PD is not already loaded, follow the steps immediately below.
- If the shell of the position description is loaded, follow the instructions to “Update/Reclassify” beginning on page 5, below.

Hover over **Position Descriptions** in the orange bar and then select “**Staff/PPF Position Descriptions**”. Click **Create New Position Description** on the right hand side.

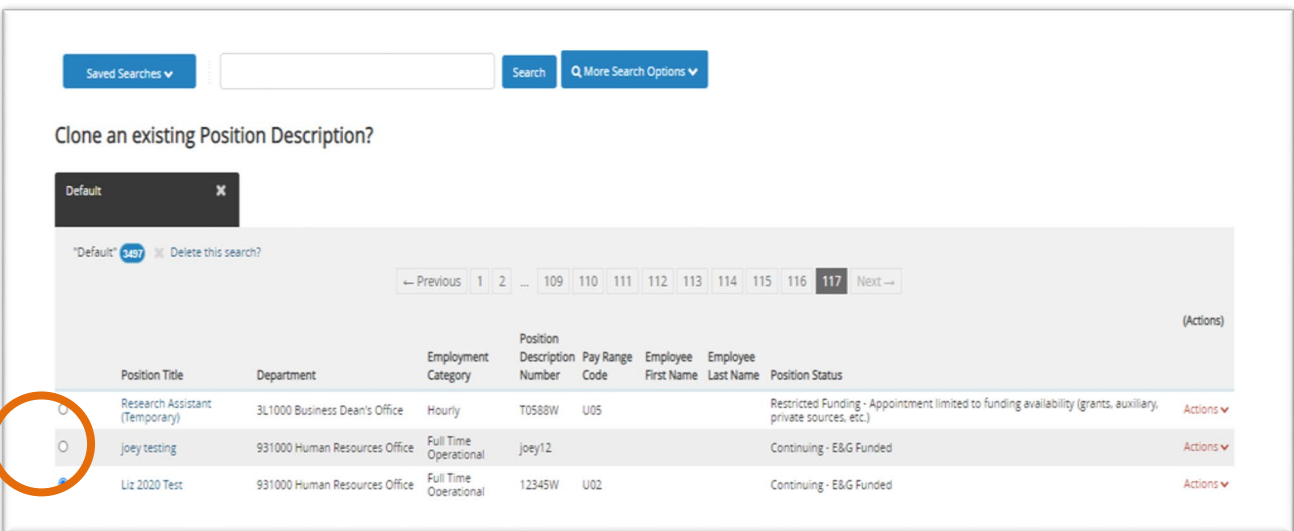


Fill in the required fields, then click on **start action**. New positions can either be **cloned** (copied) from an existing position description or **created from scratch**.

To create a new position by cloning an existing position:

1. Identify the position to be cloned from the list of Approved Position Descriptions at the bottom of the screen. You can enter a title or position number to search and shorten the list.
2. Click the radio button next to the selected position description.
3. Click 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.



Position Descriptions / Staff/PPF / Create New Position Staff/PPF

Create New Position Staff/PPF

create a new Position Description, select a title and Organizational Unit. Select a Position Description below to clone from an existing Position Description.

Position Title \*

Organizational Unit

Location \*

Division \*

Start Action Cancel

To create a new position from scratch:

1. Enter the working/internal title in the **Position Title** field.
2. Select the organizational Location, Division and Department from the drop down boxes. .
3. Click on the start action button in the top right section. Once you select start action the position description will be locked for editing.

Position Descriptions / Staff/PPF / Create New Position Staff/PPF

Create New Position Staff/PPF

create a new Position Description, select a title and Organizational Unit. Select a Position Description below to clone from an existing Position Description.

Position Title \*

Organizational Unit

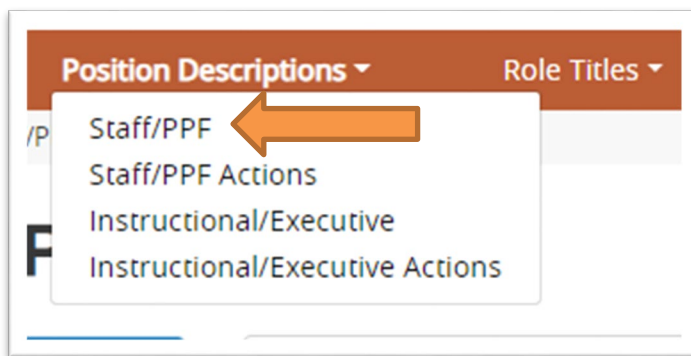
Location \*

Division \*

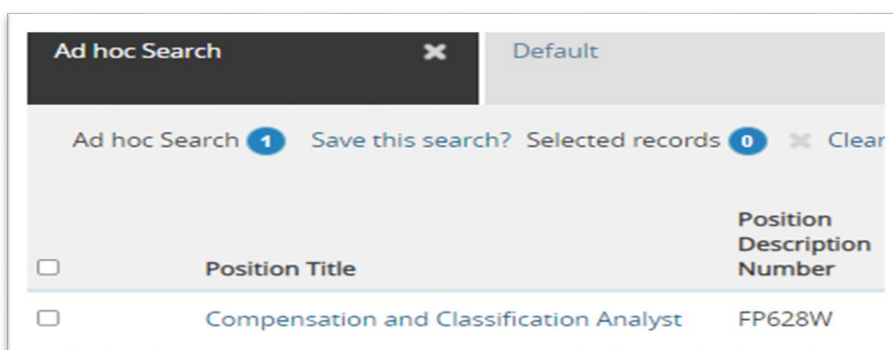
Start Action Cancel

To update a position that already exists:

1. Following the steps above, navigate to the **Position Management** module.
2. In the orange bar, click on **Position Descriptions > Staff/PPF**



3. You will see a list of positions that you have access to. Look through the list to find the position you want to update. If you have a long list you can also enter the position number in the search bar.
4. Click on the position title, which will be a hyperlink, to open the position.
  - a. **Tip:** If you are not seeing a position title, you may need to add columns by expanding the blue **More Search Options** button, click on **Add Column** drop down box and select Position Title field.



5. After you click on the title, click on the link on the right hand side to **update/reclassify existing staff/ppf position description**.



6. You are now ready to begin updating the position.

The following instructions apply to both “Create New” and “Update/Reclassify” requests.

## 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.

Role Code	Role Title	Last Status Update	Actions
90001	Graduate Assistant	February 15, 2012 at 07:08 AM	Actions
19211	Program Admin Specialist I	February 01, 2013 at 09:30 AM	Actions
01221	Prof/Lecturer I 1-12Mth	February 15, 2012 at 07:08 AM	Actions
19221	General Admin Supv I/Coord I	February 15, 2012 at 07:08 AM	Actions
59073	Laboratory & Research Spec I	February 15, 2012 at 07:08 AM	Actions
59074	Laboratory & Research Spec II	December 19, 2012 at 08:33 AM	Actions

Click the radio button next to the selected Role Title and click the **Save & Continue** button in the top right corner to go to the Position Details tab.

Position Classification

Position Classification Details

Role Title	Program Admin Specialist I
Role Code	19211
State Pay Band	04

Equal Opportunity Statement

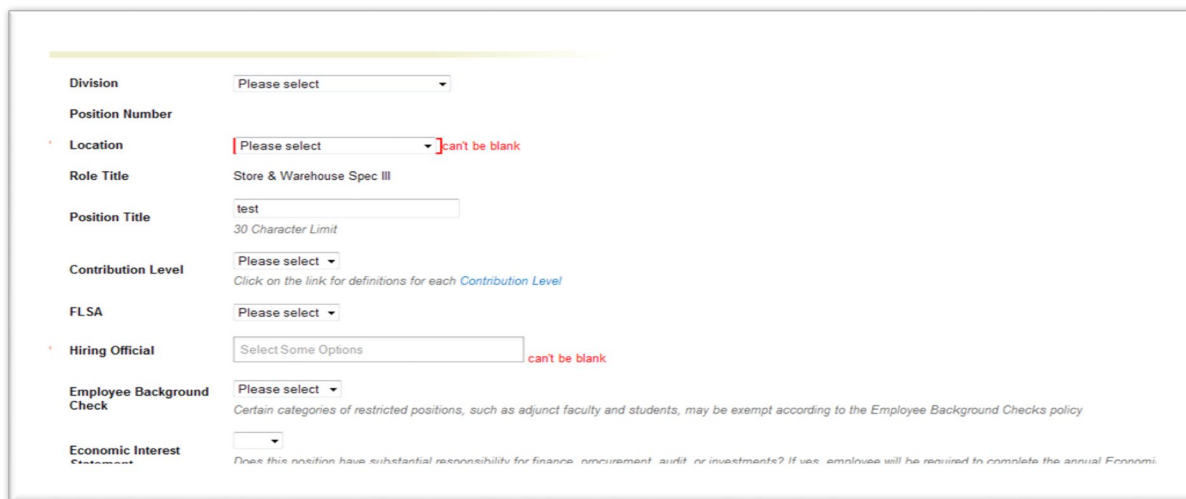
Web - Filter these results

Role Code	Role Title	Role Title Status	Role Title Job Title	Last Status Update	Actions
90001	Graduate Assistant	Approved	Graduate Assistant	February 15, 2012 at 07:08 AM	Actions

## Position Details

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

**TIP:** you can add additional hiring officials if needed as long as they already have that role.



The screenshot shows a web form titled "Position Details". It contains several fields with labels and input areas:

- Division:** A dropdown menu with "Please select" as the current selection.
- Position Number:** A text input field.
- Location:** A dropdown menu with "Please select" as the current selection. A red error message "can't be blank" is visible to the right of the dropdown.
- Role Title:** A text input field containing "Store & Warehouse Spec III".
- Position Title:** A text input field containing "test". Below the field is a note: "30 Character Limit".
- Contribution Level:** A dropdown menu with "Please select" as the current selection. Below the field is a link: "Click on the link for definitions for each [Contribution Level](#)".
- FLSA:** A dropdown menu with "Please select" as the current selection.
- Hiring Official:** A dropdown menu with "Select Some Options" as the current selection. A red error message "can't be blank" is visible to the right of the dropdown.
- Employee Background Check:** A dropdown menu with "Please select" as the current selection. Below the field is a note: "Certain categories of restricted positions, such as adjunct faculty and students, may be exempt according to the Employee Background Checks policy".
- Economic Interest Statement:** A dropdown menu with a blank selection. Below the field is a note: "Does this position have substantial responsibility for finance, procurement, audit, or investments? If yes, employee will be required to complete the annual Economic Interest Statement".

**TIP:** Your unit mission summary can usually be found on the web.

**TIP:** The position summary should be a broad overview of the position responsibilities with a few core items highlighted.

**TIP:** Required qualifications are the essential MINIMUM requirements to perform the job. Note that a college degree is not required for many career fields.

**TIP:** Preferred qualifications would be a list of qualifications that your ideal candidate would also possess.

**TIP:** Conditions of Employment include such items as the ability to lift 50 lbs, the position is non-exempt or essential and must work when the campus is closed. These are just examples.

HR will review and recommend qualifications and COE based on the position duties and responsibilities.



Essential Designation	<p><u>Yes</u> <u>No</u></p> <p><i>If yes, the employee is required to work during authorized closings because this position has been designated as essential to agency operations during emergencies.</i></p>
Unit Mission Statement	<p>This can usually be found on the web. It's always good to keep this consistent for all your positions.</p> <p><i>This field is required.</i></p>
Position Summary	<p>The position summary should be a broad overview of the position responsibilities with a few core functions identified.</p> <p><i>(Brief description of the position)</i></p>
Required Qualifications	<p>This should be a list of the essential MINIMUM requirements to perform the job. Note that a college degree is not required for many career fields.</p> <p><i>This field is required.</i></p>
Preferred Qualifications	<p>This would be a list of qualifications that your ideal candidate would also possesses.</p>
Conditions of Employment	<p>In this box, specific COE should be listed such as the ability to lift 50 lbs, the position is non-exempt or essential and must work when the campus is closed. These are just examples.</p>

Click **Save & Continue** when you are ready.

## Job Duties

Click on **add job duties button** to enter the specific job duties.

**TIP:** You can enlarge or shrink the job duties box by dragging the lower right corner of the box!

**TIP:** Often supervisors like to create a rough draft in Word and then use that to copy/paste into PeopleAdmin to allow for editing prior to submission.

1. Enter the percentage of time for the job duty and provide a description. Duties must be at least 5% to be listed and considered towards the classification of the position.
2. If the position supervises click the **Performance Management Duty Link** to copy and paste the standard Performance Management description.
3. Click **add Job Duties Entry button** until all duties have been added.
4. To remove an entry, check the **Remove Entry** box and click on **Save**.
5. After all duties have been added, enter the total percentage, the total must add to 100%.
6. Click **Save and Continue**

[Check spelling](#)  
required information

### Job Duties

On this screen, please list in order of importance, and in detail, the job function and duties assigned to this position and estimate the percentage of time for each. Percentages must add up to 100%. You may copy and paste from another document. Do not include duties which constitute less than 5%. To a job that supervises professional/operational/classified employees click here to copy and paste the standard Performance Management Duty Link

**Please Note:**

Percentage Of Time: 50

Description: A good rule of thumb is to have 3-5 core job duties/responsibilities listed. You can have more, but once you pass 7 it's a good practice to consider consolidating some of the smaller less essential functions.

☐ Remove Entry?

Percentage Of Time: 25

Description: If the position will supervise, it's a good idea to list that first. Another pro-tip is to list the job duties in order of greatest responsibility (percentage) to least. On temp positions, you may only need one

☐ Remove Entry?

Percentage Of Time: 25

Description: Consider broad responsibilities rather than individual tasks. Example: Responsible for all administrative management of the front desk operations and reception area instead of answer phones, greet customers, sort mail.

☐ Remove Entry?

**Add Job Duties Entry**

**TIP:** A good rule of thumb is to have 3-5 core job duties/responsibilities listed. You can have more, but once you pass seven duties, it's a good practice to consider consolidating some of the smaller less essential functions.


**TIP:** If the position will supervise, it is a good idea to list that first. Another pro-tip is to list the job duties in order of greatest responsibility (percentage) to least. On temp positions, you may only need one job duty listed.

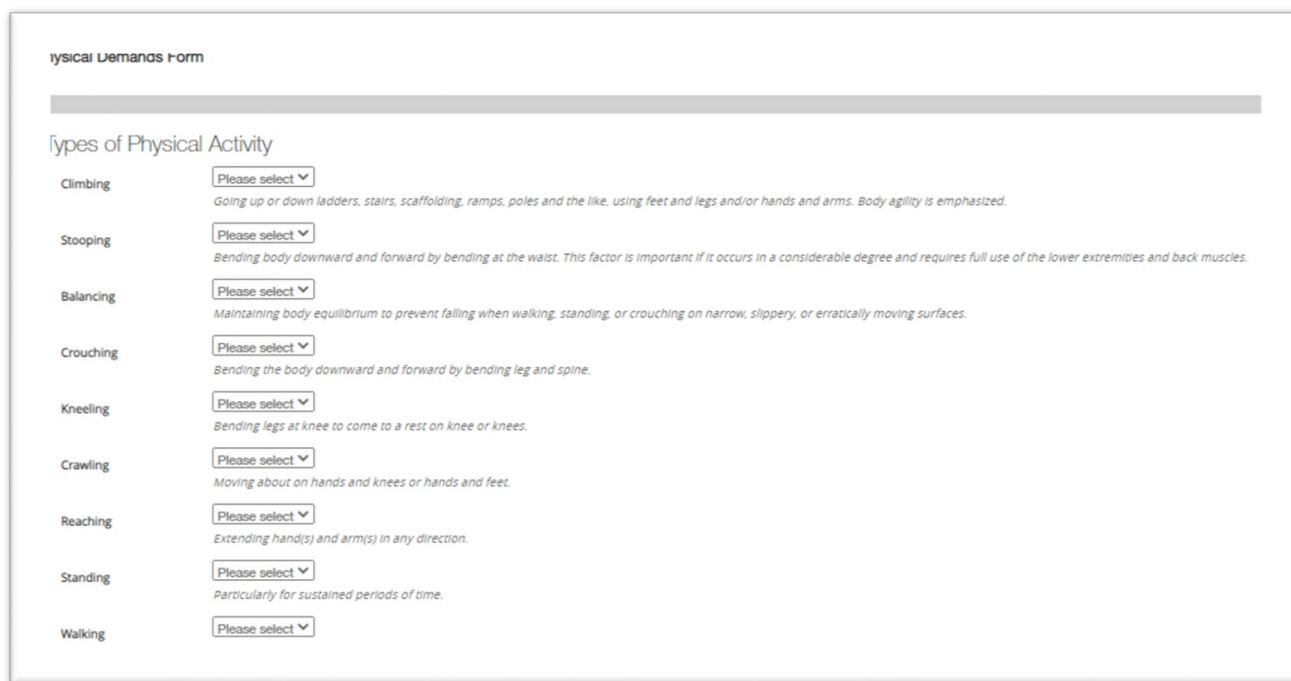
**TIP:** Consider broad responsibilities rather than individual tasks.

## 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.



**TIP:** 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.



The screenshot shows a web form titled "Physical Demands Form". Below the title is a section header "Types of Physical Activity". There is a list of ten physical activities, each with a "Please select" drop-down menu and a descriptive sentence below it:

- Climbing**: Please select  *Going up or down ladders, stairs, scaffolding, ramps, poles and the like, using feet and legs and/or hands and arms. Body agility is emphasized.*
- Stooping**: Please select  *Bending body downward and forward by bending at the waist. This factor is important if it occurs in a considerable degree and requires full use of the lower extremities and back muscles.*
- Balancing**: Please select  *Maintaining body equilibrium to prevent falling when walking, standing, or crouching on narrow, slippery, or erratically moving surfaces.*
- Crouching**: Please select  *Bending the body downward and forward by bending leg and spine.*
- Kneeling**: Please select  *Bending legs at knee to come to a rest on knee or knees.*
- Crawling**: Please select  *Moving about on hands and knees or hands and feet.*
- Reaching**: Please select  *Extending hand(s) and arm(s) in any direction.*
- Standing**: Please select  *Particularly for sustained periods of time.*
- Walking**: Please select

When the Physical Demands has been completed **select Save and Continue.**

## Supervisory Position

Select the Supervisory Position from the list of Approved Position Descriptions. **For executive /instructional supervisors positions, change the position type to Instructional/Executive.**

Supervisory Position

In this tab you can select the Supervisory Position for the position description you are creating.  
Position Descriptions - Filter these results

Default × "Default" Close × Delete this search?

← Previous 1 2 3 4 5 6 7 8 9 ... 116 117 Next →

	Position Title	Department	Employment Category	Position Description Number	Pay Range Code	Employee First Name	Employee Last Name	Position Status	(Actions)
<input type="radio"/>	Asst Res Sci/Breeding Res Migr	133100 ABC		FP002V		Anuoluwapo S.	Frank-Lawale		Actions <span>▼</span>
<input type="radio"/>	Business Manager	133100 ABC		00322V		Deborah	Pelata		Actions <span>▼</span>
<input type="radio"/>	Field Logistics Specialist	133100 ABC	Full Time Operational	00298V	U05	Andrew	Verderame	Restricted Funding - Appointment limited to funding availability (grants, auxiliary, private sources, etc.)	Actions <span>▼</span>

Search Position Descriptions ×

Search:

Position Type: Instructional/Executive ▼ ←

Add Column:

Role Code:

Search Position Descriptions ×

Search:

Position Type: Staff/PPF ▼ ←

Add Column:

Role Code:

Click **Save and Continue**.

## Budget Information

Complete all required information.

**TIP:** Questions on funding sources and account codes should be directed to your budget analyst or sponsored programs administrator in central office.

The screenshot shows a web form titled "Budget Information". At the top, there is a "Check spelling" link and a "Required Information" section. Below this is the "Time Sheet Approver Information" section, which includes a text field for "Time Sheet Approver's Position Number If Different from Supervisor". The main "Budget Information" section contains several fields: "Agency" (a dropdown menu showing "W&M (204)"), "Position Description Effective Date" (a date field with a calendar icon, containing "dd/mm/yy" and a red error message "This field is required."), "Position Status" (a dropdown menu showing "Continuing - E&G Funded"), "Employment Category" (a dropdown menu showing "Full Time Operational"), "If Part-time or Hourly indicate hours per week" (a text field), "Position Term" (a dropdown menu showing "12 Month - Continuing"), "If other, specify the months" (a text field), and "Pay Range Code" (a dropdown menu showing "Please select"). A black callout box with white text is positioned over the "Position Description Effective Date" field, stating: "Date you request position description to be effective. This is not the date position description receives final".

**TIP:** The base budget is the amount of base salary budgeted for the position; it is NOT a guarantee of the rate or salary that will be paid to the candidate hired.

Pay Range Code	[ Please select ▼ ] <a href="#">View Range Code</a>
Base Budget Amount: Annual Salary (full time positions) or hourly rate (part time). Does not include fringe cost	<input type="text" value="\$50,000"/>
Funding Source	<input checked="" type="checkbox"/> E&G Funded <input type="checkbox"/> Auxiliary Funded <input type="checkbox"/> Grant Funded <input type="checkbox"/> Foundation Funded <i>Check All that Apply</i>
Funding Justification For Position	<div>This box contains notes for the budget and sponsored programs office.</div>
Budget Office Comments	
Banner Funding Source	
A Minimum of ONE Entry is Required	
* Index	<input type="text" value="120172"/>
* Account	<input type="text"/> This field is required.
* Percent	<input type="text" value="100"/>
Activity Code	<input type="text"/>
<input type="checkbox"/> Remove Entry?	
<div>Add Banner Funding Source Entry</div>	

## 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:

The screenshot shows a web interface for managing documents. At the top right are buttons for 'Save', '<< Prev', and 'Save & Continue'. Below the header, there is instructional text: 'To add a document to the posting, hover over the blue Action text link to the right of the document name. Documents can be uploaded by browsing for the document or a document can be written or previously selected.' A red 'LEASE NOTE:' section follows, stating that hiring officials need to attach the Org Chart and listing supported file types (doc, docx, pdf, rtf, txt, xlsx, etc.). Below this is a table with columns 'Document Type', 'Name', 'Status', and 'Actions'. The table lists several document types, each with an 'Actions' dropdown menu.

Document Type	Name	Status	Actions
Organizational Chart (Required)			Actions
Position/Budget Justification			Actions
Memorandum			Actions
Classification/Compensation Review Form			Actions
Other Document 1			Actions
Other Document 2			Actions

At the bottom right of the table area are buttons for 'Save', '<< Prev', and 'Save & Continue'.

Select **Upload New** to upload a document from your files. Search for the document on your computer and 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.

The screenshot shows a form titled 'Upload a Organizational Chart (Required)'. It includes instructions: 'To upload your document, provide a name and description of the document. To choose a file to upload'. There are input fields for 'Name' (containing 'Organizational Chart (Req)') and 'Description'. Below these is a 'File to upload' section with a 'Choose File' button and the text 'No file chosen'. A 'Submit' button is at the bottom left.

Note: Only the user that uploaded a document can remove the document.

Select **Create New** to open the system format editor to create a document. Once you are finished, click on Submit.

## Create a New Organizational Chart (Required)

Name

Description

**B** *I* U ~~S~~  $\times_2$   $\times^2$   $\frac{1}{2}$   $\frac{3}{4}$   $\frac{5}{8}$   $\frac{7}{8}$   $\frac{9}{16}$   $\frac{11}{16}$   $\frac{13}{16}$   $\frac{15}{16}$   $\frac{17}{16}$   $\frac{19}{16}$   $\frac{21}{16}$   $\frac{23}{16}$   $\frac{25}{16}$   $\frac{27}{16}$   $\frac{29}{16}$   $\frac{31}{16}$   $\frac{33}{16}$   $\frac{35}{16}$   $\frac{37}{16}$   $\frac{39}{16}$   $\frac{41}{16}$   $\frac{43}{16}$   $\frac{45}{16}$   $\frac{47}{16}$   $\frac{49}{16}$   $\frac{51}{16}$   $\frac{53}{16}$   $\frac{55}{16}$   $\frac{57}{16}$   $\frac{59}{16}$   $\frac{61}{16}$   $\frac{63}{16}$   $\frac{65}{16}$   $\frac{67}{16}$   $\frac{69}{16}$   $\frac{71}{16}$   $\frac{73}{16}$   $\frac{75}{16}$   $\frac{77}{16}$   $\frac{79}{16}$   $\frac{81}{16}$   $\frac{83}{16}$   $\frac{85}{16}$   $\frac{87}{16}$   $\frac{89}{16}$   $\frac{91}{16}$   $\frac{93}{16}$   $\frac{95}{16}$   $\frac{97}{16}$   $\frac{99}{16}$   $\frac{101}{16}$   $\frac{103}{16}$   $\frac{105}{16}$   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$\frac{523}{16}$   $\frac{525}{16}$   $\frac{527}{16}$   $\frac{529}{16}$   $\frac{531}{16}$   $\frac{533}{16}$   $\frac{535}{16}$   $\frac{537}{16}$   $\frac{539}{16}$   $\frac{541}{16}$   $\frac{543}{16}$   $\frac{545}{16}$   $\frac{547}{16}$   $\frac{549}{16}$   $\frac{551}{16}$   $\frac{553}{16}$   $\frac{555}{16}$   $\frac{557}{16}$   $\frac{559}{16}$   $\frac{561}{16}$   $\frac{563}{16}$   $\frac{565}{16}$   $\frac{567}{16}$   $\frac{569}{16}$   $\frac{571}{16}$   $\frac{573}{16}$   $\frac{575}{16}$   $\frac{5$

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.

Click **Save & Continue**.



## 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.

The screenshot shows the 'Create New Position Staff/PPF: Administrative Coordinator Example (Staff/PPF)' page. The top navigation bar includes 'Home', 'Position Descriptions', and 'Role Titles'. The breadcrumb trail is 'Actions / ... / Create New Position Staff/PPF / New Position definition / Summary'. The main content area displays the title 'Create New Position Staff/PPF: Administrative Coordinator Example (Staff/PPF)' with an 'Edit' link. Below the title, the 'Current Status' is 'Compensation Final & Approval'. The 'Position Type' is 'Staff/PPF', 'Department' is '931000 Human Resources Office', 'Created by' is 'Elizabeth Robbins', and 'Owner' is 'Compensation'. At the bottom, there are tabs for 'Summary', 'History', 'Settings', and 'Reports'.

To initiate the approval queue, click the **Take Action on Action** button and chose from the list of available actions.

The screenshot shows a user interface for Elizabeth Robbins. The top navigation bar includes 'Welcome, Elizabeth Robbins', 'My Profile', 'Help', and 'Logout'. Below this, there is a 'User Group:' dropdown menu with 'Compensation' selected. A 'Shortcuts' button is also visible. In the main content area, there is a 'Take Action On Action' button with a dropdown arrow, and two links: 'Print Preview' and 'Add to Watch List'.

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. Comments to include may such items as “this is a copy of position ABC456” or “we have identified ca candidate for this temp position.” **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.** Once the action leaves your box, you need to have sent back to you to make changes.

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.

### Other Tips & Tricks:

You can also set your default log on and role to be position management by clicking on “My Profile” in the top:

The image shows two screenshots from a web application. The top screenshot is a header bar with a dark blue background. It contains the text "Welcome, Elizabeth Robbins" followed by three links: "My Profile", "Help", and "logout". The "My Profile" link is circled in orange. Below the header bar is a "User Group:" label and a dropdown menu showing "Level 0 - Hiring Initiator". Below that is an orange bar with the text "Shortcuts" and a downward arrow. The bottom screenshot is a "User Details" page. It has a header with a green checkmark and the text "User Details" and "Edit". Below this is a section titled "Account Information" containing a table with the following fields: "WM User ID" (earobbins), "Username" (earobbins), "First Name" (Elizabeth), "Last Name" (Robbins), "Title" (Compensation Analyst), "Phone Number" (7572213157), "Email" (earobbins@wm.edu), and "Department" (931000 Human Resources Office, William & Mary and VIMS). Below the table is a "Banner Id Detail" field with a blacked-out value. At the bottom is a "Default Module" field with the value "Position Management", which is circled in orange.

User Details <a href="#">Edit</a>	
Account Information	
WM User ID	earobbins
Username	earobbins
First Name	Elizabeth
Last Name	Robbins
Title	Compensation Analyst
Phone Number	7572213157
Please provide the department name and the type of access needed: Please provide the department name and the type of access needed:	
Email	earobbins@wm.edu
Department1) Click on the name of your department and click the top arrow (>) to select - please only select your own department(s).2) Selected department(s) appear in the right hand box.	931000 Human Resources Office, William & Mary and VIMS
Banner Id Detail	[Redacted]
Default Module	Position Management

## WORK FLOW PROCESSES – Create New Staff/PPF Position:

1. Hiring Official creates, routes to Level 1 (Department approval)
2. Level 1 routes to Level 2 (Division approval)
3. Level 2 routes to Class/Comp Initial Review
4. C/C reviews and classifies, routes to funding office
5. Funding – Budget, OSP, or Investment Admin verifies funds, sends to Comp Final Review
  - \*Funding has the option to return an action to the hiring official for correction/revisions to budget and accounting information.
6. Class/Comp finalizes, moves to one of two steps:
  - Sent to Employment for posting if the position will be recruited. The Hiring Official Notified and Employment notified to create a Posting via system generated email
  - OR finalizes PD and provides a memo to document any changes from a class/comp review.