



UNIVERSITY OF
GEORGIA
Human Resources

UGAJobs Position Management Resource Manual

**Faculty
Position Types**

Revised 12.13.2018

U N I V E R S I T Y O F G E O R G I A

Position Management Resource Manual

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Introduction

The University of Georgia has implemented a new online position management and applicant tracking system, **UGAJobs**. The objective of UGAJobs is to streamline the approval, posting, and hiring processes for the University and our applicants.

Hiring departments should use the **UGAJobs** system to receive approval for and post staff positions.

The learning objectives include the following:

- Create and submit requests for new positions
- Evaluate and modify position descriptions
- Track the status of Position description requests
- Keep your HR organization structure up to date
- Search for and locate classification information

Position Management Overview

Position Management is the process by which departments determine how jobs are defined, how many positions are needed, and what the organizational structure should look like. As a part of the position management functionality departments will have the opportunity to create a new position, evaluate a position or modify a position.

- **Create a position:** Every employee needs to be assigned to a position description. If the department does not have a position to seat an employee into, a new position will need to be created.
- **Evaluate a position:** A position may need to be evaluated when there are operational changes to a position that shifts the assigned responsibilities resulting in a new title or percent time change.
- **Modify a position:** When modifying a position, departments have the ability to update the reporting relationship, the budget position number, and/or vacate an employee from a position in order to post and recruit for a new faculty/staff member.

Accessing UGAJobs

The Web Address/URLs for the site include the following:

Departmental User Site: <https://www.ugajobsearch.com/hr/>

Applicant Portal: <https://www.ugajobsearch.com/>

Requesting additional User Roles

All benefit eligible UGA employees have an employee account within UGAJobs. To request an additional User role, please visit the employ@uga.edu homepage (<https://www.ugajobsearch.com/hr/>) and select **Request an account**. You will be asked to state which department and user group you would like to be associated with and include any additional information for account setup or access privileges. (Special permissions are required for account setup and security outside of the manager/supervisor role). This form must be submitted to central HR employment team by the units Chief HR Officer and or Financial Director.

Browser Support

The system has been tested with the following browsers:

- Chrome (self-updating)
- Firefox versions currently supported by Mozilla
- Internet Explorer version 9 or 11 and later
- Safari versions currently supported by Apple

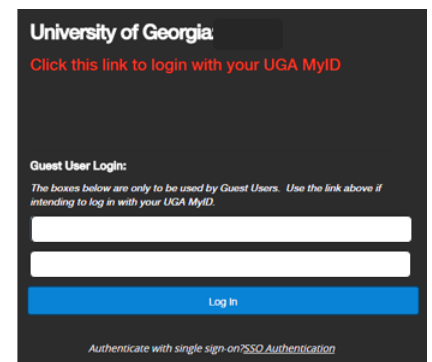
Data Security

To ensure the security of the data, **the system will automatically log you out after 60 minutes if it detects no activity.** However, any time you leave your computer, it is strongly recommended you save any work in progress and logout of the system by clicking on the **Logout** link located on the top-right-side of your screen.

Log-in to UGAJobs

To access the University of Georgia's UGAJobs user portal, visit the following web address: <https://www.ugajobsearch.com/hr/>

Select **Click this link to login with your UGA MyID.** Next, you will be redirected to the UGA Central Authentication Service, which requires users to type their UGA MyID and password, allowing you to securely access the UGAJobs System.



ArchPass Duo

You will need ArchPass Duo, UGA's two-factor authentication service, to complete this new login process. Two-factor authentication means there are two steps to the login process. The second step helps protect your personal information and secure the UGA network.

To use ArchPass Duo with UGAJobs, you must first enroll a device through the Self-Service Portal at archpass.uga.edu/enroll. The enrollment process is completely self-service and can be completed in five minutes. You should not need to contact the Help Desk to enroll a device in ArchPass Duo.

An instructional video on enrolling is available on the EITS Help Desk YouTube channel at https://www.youtube.com/watch?v=v_kHxQu5Gvw.

If you are already enrolled in ArchPass Duo for another system, such as the Remote Access VPN, you do not need to enroll again. You can enroll a smartphone, tablet, cell phone and/or landline phone. Once enrolled, you will still be able to access UGAJobs from any computer or device you choose. Your enrolled ArchPass Duo device is used only to verify your ID during the login process.

To log in to UGAJobs with ArchPass Duo:

- 1) Enter your MyID and password.
- 2) Verify your ID with a device enrolled in ArchPass Duo. You can verify your ID with a push notification from the Duo Mobile App, a passcode generated by the Duo Mobile App, a password sent by SMS text message or a phone call.

You can find more information about ArchPass Duo at archpass.uga.edu. If you have questions about ArchPass Duo, please contact the EITS Help Desk at helpdesk@uga.edu or 706-542-3106.

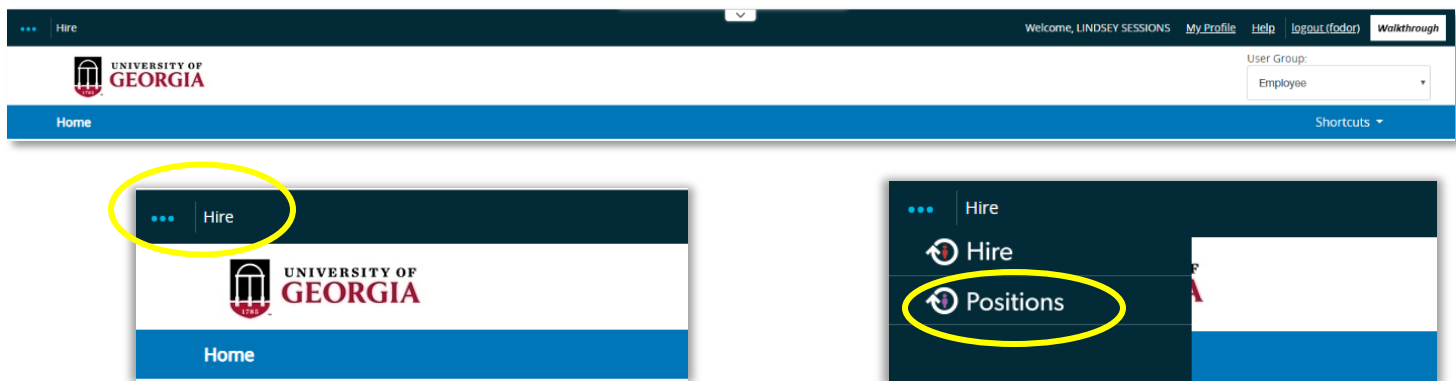
Getting Started

Once you log in to UGAJobs, <https://www.ugajobsearch.com/hr/>, any positions that you have authority to view will be displayed. The status of the position will determine what you can view.

EXAMPLE: If a position is still in the approval process workflow and has not yet been approved or completed, you will only be able to view the position summary details.

NOTE: When you log in to UGAJobs, your default user account will be your employee account. If you have another authorization role (i.e. Initiator, Search Committee Member, Approver, Unit Head, etc.) you must select the role from the drop box to the right of your name.

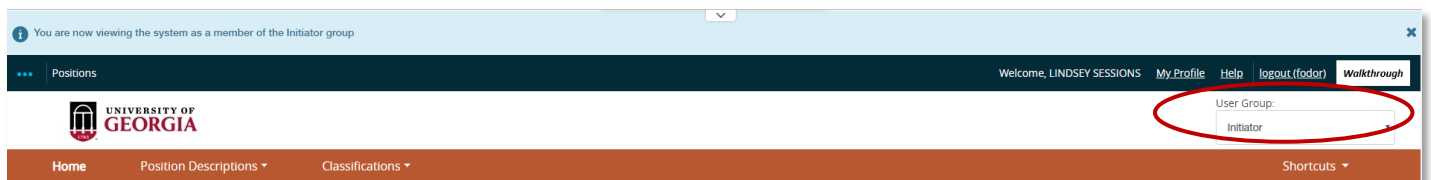
When you arrive at the homepage, look at the top left corner to ensure the **POSITION** module is selected. If not, click on the three dots and select **POSITION** from the list.



The top of your screen will change colors. In this module, the top of your screen will be **Orange**.



Below the right of your **name**, make sure ***Initiator** is selected from the drop box. Any time you make a change in this box be sure to take note of the **notification banner** at the top of the screen.



***Note: Initiators** are typically the department/unit representatives who oversee the administrative components of the position, posting, and hiring process for their department. This user will initiate all requests in the system and route to the next level approval. The **Initiator** is the only user who can create/initiate requests in the system.

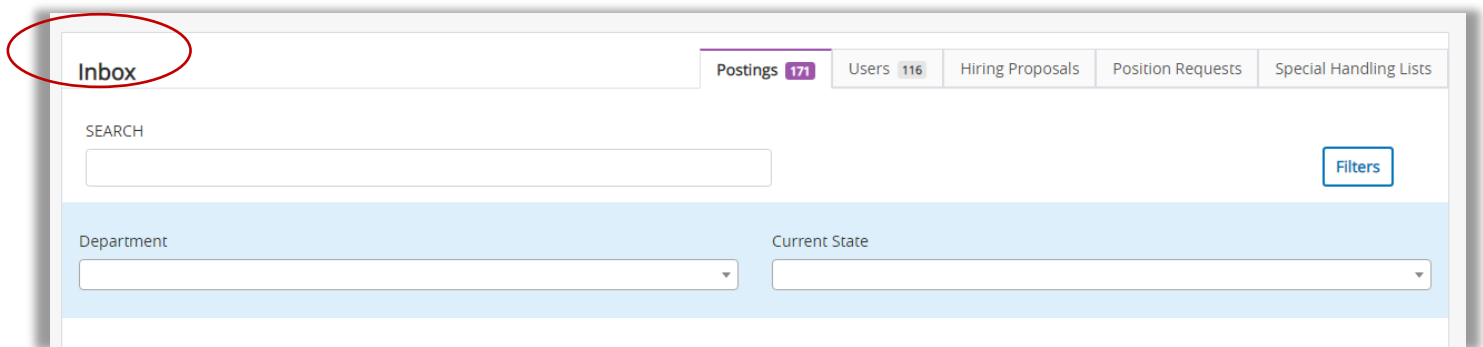
Your Inbox and Watch List

Your homepage displays two key features in the system: Your **Inbox** and **Watchlist**.

The **Inbox** contains all items that require your attention. These include items that are specifically assigned to you in their current state, and items that do not have individual owners, but you are authorized to act on if nobody else acts on them.

The **Inbox Preview** area is categorized by object type to help you find objects easier. Each item in your Inbox includes a link that opens the appropriate page for you to take the required action on the item. Once action is taken on an item, the item disappears from the Inbox.

NOTE: *Your Inbox does not include items that are currently assigned to other people.*

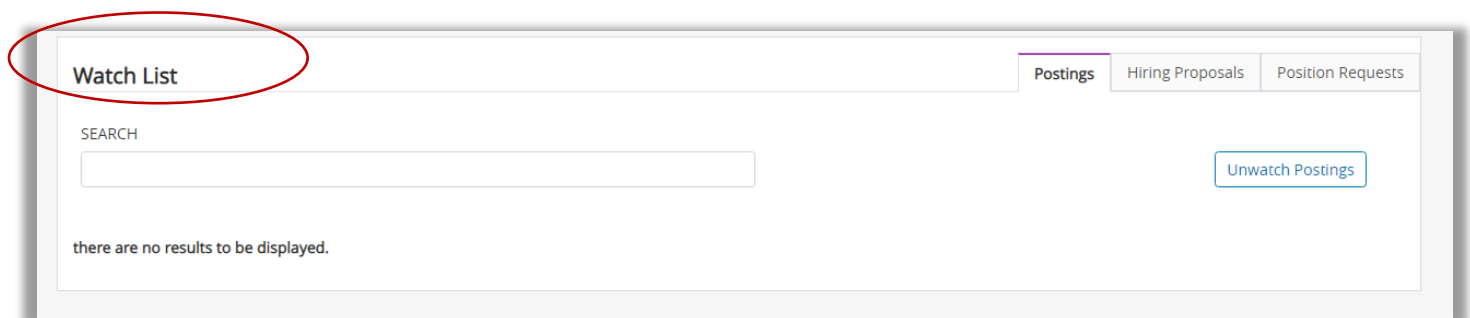
A screenshot of the 'Inbox' interface. The title 'Inbox' is circled in red. The interface includes a search bar with the label 'SEARCH', a 'Filters' button, and two dropdown menus labeled 'Department' and 'Current State'. At the top, there are tabs for 'Postings' (with a count of 171), 'Users' (with a count of 116), 'Hiring Proposals', 'Position Requests', and 'Special Handling Lists'.

The **Watch List** allows you to track the status of selected postings, hiring proposals and position request. By default, your watch list includes all items that you create.

You can also choose to watch other items within your assigned department. Items are automatically removed from your watch list when they are completed or canceled. You can also choose to stop watching at any time. As with the inbox, the home page presents a limited view of your watch list.

If you own an item in its current state – if you are responsible for the next task or able to carry it out – you can open it from your inbox or watch list.

NOTE: To remove items from the watch list, select the **Watch List** title link and select **Stop Watching Posting** from the **Actions** link drop-down menu for the posting(s) you wish to stop following.

A screenshot of the 'Watch List' interface. The title 'Watch List' is circled in red. The interface includes a search bar with the label 'SEARCH', an 'Unwatch Postings' button, and a message that says 'there are no results to be displayed.' At the top, there are tabs for 'Postings', 'Hiring Proposals', and 'Position Requests'.



Request to Create a New Position

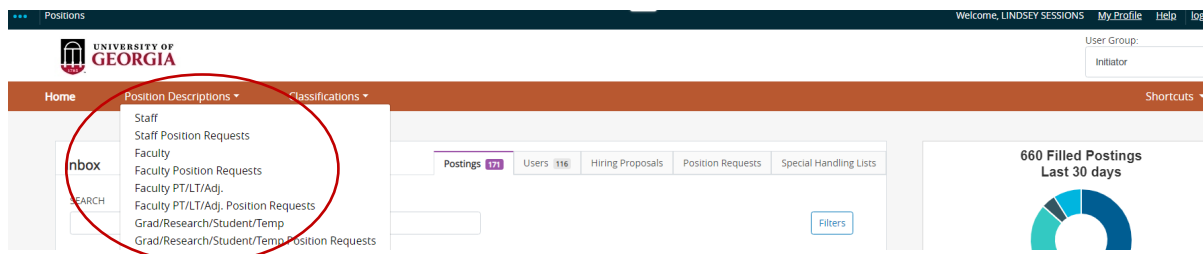
**Faculty
Position Types**

Revised 12.13.2018

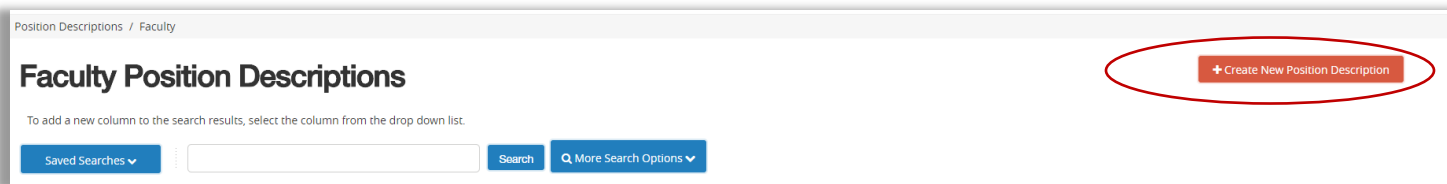
Create a New Position Description

Click on the **Position Descriptions** tab and select the desired position from the drop-down box.

Select **Create New Position Description** at the top right of the screen.



Once you select **Create New Position Description**, the below screen will appear.



Position Descriptions / Faculty / New Position Description ☆

New Position Description Start Position Request Cancel

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

Working Title *

Organizational Unit

Major Unit *

Division *

Department *

VP FOR FINANCE & ADMIN (G)

HUMAN RESOURCES DIVISION (G050)

Central HR Human Resources (H1000605)

Saved Searches Search Q Hide Search Options

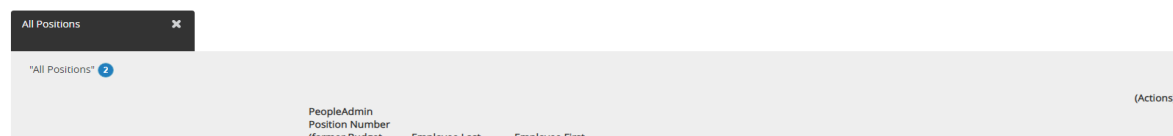
Add Column:

Department:

Status:

You will be able to create a brand new position. Enter your **Working Title**. The **Major Unit**, **Division** and **Department**, if applicable, these fields will already be chosen for you.

Clone an existing Position Description?



You will also be able to **Clone an existing Position Description**. You would chose to clone an existing position when you need to **create the same position again** because cloning **copies in the existing information** on a selected Position Description. Cloning also gives you the ability to edit that information. To clone a Position Description, **click the radio button next to the Position Description**.

Start Position Request

After choosing your method of **Creating a Position Description**, select the **Start Position Request** button.

Position Justification Tab

The **Position Justification** screen appears. This section allows you to justify your need for the position description.

Any box in red is a required field. Although there are required and non-required fields, the more detailed information you can provide, the better.

Position Requests / ... / New Position Description / Academic HR Professional / Edit

Editing Position Request

- Position Justification
- Classification
- Position Details
- Duties/Responsibilities
- Budget Position Inform...
- Position Supervisor
- Position Documents
- Position Request Summary

Position Justification

Check spelling

Required Information

Reason for Position Update

Create New Position

This field is required.

Test

Justification of Need

Please include the following: What has changed about this position? Where are the newly assigned duties originating from? Please include the names and titles of the individuals previously performing these duties. Please note if this is part of a larger reorganization.

Save Next >>

Throughout the process of creating a position request, if needed, you can move from screen to screen using the page links located on the left sidebar.

Be sure to click on the **Save** button if you choose to utilize this feature. After clicking on the Save button you can also **use the back button** to easily return to your previous page.

If you chose to click the **Next** button, your information will automatically be saved.

Classification Tab

The next screen allows you to select a **Classification**. This read-only tab displays a list of classifications.

Classification

Save << Prev Next >>

Classifications - Filter these results

Faculty Classifications

"Faculty Classifications" 203

← Previous 1 2 3 4 5 6 7 Next →

(Actions)

Classification Title	Classification Code	Classification Status	Actions
ACADEMIC PROFESSIONAL	77815	Approved	Actions
ACADEMIC PROFESSIONAL ASSOC	77810	Approved	Actions

If you need to refine your search and quickly find a classification, you can use the search tools.

To search for a classification, select **Filter these results**. The following box will appear allowing you to search for a classification by Classification Title, Classification Code, EEO Code etc.

Search Classifications

Search

Add Column: Add Column

Search Cancel

You also have the ability to **Add Column** and customize your search.

Once you select the appropriate classification, the information provided in the selected classification will copy into the classification tab and fields in the position details.

Search Classifications

Search

Add Column:

Add Column

Add Column

Annual Maximum

Annual Midpoint

Annual Minimum

BOR Name

Classification Code

Classification Description

Classification Job Title

Classification Status

Classification Title

Created Date

Created From

EEO Code

FLSA

Is this a Position of Trust?

Job Code

Job Family

Job Family2

Last Status Update

Last Updated

Position DetailsTab

This section allows you to complete the position details. **Any box in red is a required field.**

NOTE: Required fields are also marked with a red asterisk “*”. This indicates that the data field must be completed to save, move to the next page, and/or submit.

Editing Position Request

Position Justification

✓ Classification

✓ Position Details

✓ Duties/Responsibilities

✓ Budget Position Inform...

✓ Position Supervisor

✓ Position Documents

Position Request Summary

Position Details

ABC [Check spelling](#)

* Required Information

Seated Employee Information

Employee First Name

Employee Last Name

UGA PeopleSoft Employee ID

UGA Badge Number

Work Email

Position Information

Action Number

* Working Title

Clinical Assistant Professor

OneUSG Connect Job Title

Professor

OneUSG Connect Job Code

200X00

Pay Group

18F - 10 Month Faculty

Major Unit

SR VP FOR ACAD AFF & PROVOST

Division

COLLEGE OF PHARMACY

HR Department

Pharmacy Pharm & Biomedical Sc

* Campus Address

320A Wilson Pharmacy

* Campus City

Athens

* Campus State

GA

* Campus Zip Code

30602

* Campus Business Phone

7065427410

When creating a new position the Seated Employee Information section will always be blank because you are advertising for an employee.

* Is this a supervisory position?

If yes, then how many Full Time Benefit Eligible Employees are supervised?

* Names/Titles of Employees Supervised

Please Include names and titles of employees supervised. Please do not list more than 5 individuals

* FTE
Employee work percentage

* Standard Hours
Format is XX.XX so if entering 40 hours, please enter '40.00'.

* Standard Work Period

* Full Time/Part Time

* Effective Date
Effective date is defined as an employee's first date of employment

Joint Appointment

Appointment Status

* Faculty Rank

Contract Type

* Tenure Status

EOO Approval Begin Date

EOO Approval End Date

Minimum Qualifications

★ **Position Summary**

Add position summary...

Please provide a 5-10 sentence job description for the proposed position

**Additional
Requirements**

Specify required degree(s) and acceptable disciplines here. If open rank position, present requirements for each possible rank here.

**Relevant/Preferred
Education, Experience,
Licensure, and/or
Certification**

If minimum qualifications state relevancy, please list include relevant information.

**Preferred Knowledge,
Skills, Abilities and/or
Competencies**

This applies only to those positions that have administrative responsibilities.

Physical Demands

Physical Demand refers to the level and/or duration of physical exertion generally required to perform occupational tasks (sitting, standing, walking, lifting, carrying, etc.). For more information, please visit [Physical Demands](#).

Impact and Influence

This position will interact with the Department of Pharmaceutical and Biomedical Sciences, Chemistry, Complex Carbohydrates, and also the Georgia Research Alliance.

Who will this position interact with on a consistent basis (title/name)? What degree of autonomy will the individual have within the role? To what extent do their decisions impact the organization?

Job Indicator

Primary

Location

Athens Area

Does this position have financial responsibility?

Yes

The operation, access or control of financial resources.

Does this position require a P-Card?

No

Is having a P-Card an essential function of this position?

No

P-Card policy: [http://policies.gsu.edu/policies/p-card](#)

Background Check Policy: [http://policies.gsu.edu/policies/background-check](#)

Is driving a requirement of this position?

No

These questions are required in order to ensure the necessary checks are in place when determining the appropriate background package.

These questions are required in order to ensure the necessary checks are in place when determining the appropriate background package.

Duties/Responsibilities Tab

Instruction text has been provided as guidelines on how to utilize the **Duties and Responsibilities** section:

Duties & Responsibilities apply to those staff and faculty administrative positions. Please approximate the percentage of time spent on each task (out of 100%) during a typical workweek. List these tasks in order of importance, with the most critical task coming first. Do not list more than six entries – do not go below 5% time per assigned duty.

The screenshot shows a web form titled "Allocation of Effort" and "Duties/Responsibilities". Under "Allocation of Effort", there are five input fields for "Percent Instruction", "Percent Research", "Percent Clinical", "Percent Public Service", and "Percent Administration". A red bracket groups these fields, with a callout box stating: "The Allocation of Effort fields are optional and serve as an opportunity to detail how the positions will be allocated amongst instruction, research, service, clinical and administration." Below this is the "Duties/Responsibilities" section, which includes a large text area for listing duties, a "Percentage of time" input field with a note "Enter a number with a maximum of 3 digits.", a "Remove Entry?" checkbox, and a blue "Add Duties/Responsibilities Entry" button. A red arrow points from the callout box to this button, with a text box stating: "When adding more than one Duties/Responsibilities Entry, press the **Add Duties/Responsibilities Entry** button to add an additional section." Below the button is the "List Similar Position Details" section, which includes a note "Applies to only those positions with administrative appointments." and two text areas for listing similar positions at UGA and outside UGA, with instructions to include names, titles, and contact information. A red line with an arrow points from the "Remove Entry?" checkbox to a text box at the bottom stating: "To remove an entry, check the **Remove Entry box** and then select **save**."

The Allocation of Effort fields are optional and serve as an opportunity to detail how the positions will be allocated amongst instruction, research, service, clinical and administration.

When adding more than one Duties/Responsibilities Entry, press the **Add Duties/Responsibilities Entry** button to add an additional section.

To remove an entry, check the **Remove Entry box** and then select **save**.

Budget Position Information Tab

Check spelling

* Required Information

Budget Position Number

PeopleAdmin Position Number

PeopleSoft Position Number

Central HR Use Only

On this screen you can view budget information and the PeopleSoft Position Number.

You also have the ability to add budget information. Click on the **Add Budget Summary Entry** button.

Budget Summary

Add Budget Summary Entry

Once you select **Add Budget Summary Entry**, the following information will appear:

Budget Summary

Budget Account Name

Budget Account Number

Percent

Enter a number with a maximum of 3 digits.

☐ Remove Entry?

Add Budget Summary Entry

To remove an entry, check the **Remove Entry** box and then select **save**.

Position Supervisor Tab

The **Position Supervisor** tab allows you to select the supervisor (who will be supervising) the employee in the position you are creating.

For example, **ACADEMIC PROFESSIONAL** will supervise the position that is being created. Therefore, whoever is seated in Position **ACADEMIC PROFESSIONAL** will supervise the position that is being created.

If the employee in **ACADEMIC PROFESSIONAL** leaves for any reason and someone else is hired, the subordinates' positions will update automatically. This will alleviate the need to do supervisory updates.

Position Supervisor

Save << Prev Next >>

Add Supervisory Position - Using the list of employees below, locate and select the supervisor who will directly oversee this position. If you are unable to locate the supervisor in the list provided, please notify Central HR with the following information, using the comment box which appears when transitioning a request in the workflow:

- Supervisor first and last name (If the position is vacant, type "vacant" in the comment box)
- Department name
- Budget position number

Once the request is submitted to Central HR, the appropriate supervisor will be selected based on the information provided.

Position Descriptions - Filter these results

All Positions

All Positions 1

Working Title	PeopleAdmin Position Number (former Budget Position Number)	Employee Last Name	Employee First Name	HR Department	Supervisor
---------------	---	--------------------	---------------------	---------------	------------

(Actions)

Position Documents Tab

The following page allows you to upload any internal documents pertinent to this position. The documents will not be seen by applicants, only those in the Position Management workflow with access to the position.

The system will allow you to upload a new document, create a document within the system, or choose an existing document you have used for a previous posting.

Select **Actions** and choose from the options provided:

Be sure to read the instruction text provided

- Create New
- Choose Existing
- Upload New

By selecting the option, **Upload New**, you will be taken to the below screen:

Upload a Current Organizational Chart

To upload your document, provide a name and description of the document. To choose a file to upload, click the **Choose File** button and select the file from your computer. When you are ready to submit your document, click the **Submit** button.

Name

Current Organizational C

Description

File to upload

Choose File

No file chosen

Submit

***Provide a **name** and **description** of the document, allowing other designated users the ability to view uploaded documents.*

Once a file is chosen to upload, and you are ready to submit your document, click the **Submit** button. You will then be taken back to the **Position Documents** main screen (see below).

The system will convert all documents into PDF's. All PDF conversions must be completed for the document to be valid when applicable. The document will transform into a *hyperlink* when the conversion is complete. You can also view the *status* of the conversion to determine if the upload was successful.

Position Requests / ... / New Position Description / Academic HR Professional / Edit

Editing Position Request

Position Justification

Classification

Position Details

Duties/Responsibilities

Budget Position Inform...

Position Supervisor

Position Documents

Position Request Summary

Position Documents

Save

<< Prev

Next >>

Please provide supporting documents where required by unit/school/college. PDF conversion must be completed for the document to be valid when applicable.

Document Type	Name	Status	(Actions)
Current Organizational Chart			Actions
Proposed Organizational Chart			Actions
Resume for Reclassification			Actions
Supporting Document 1			Actions
Supporting Document 2			Actions
Supporting Document 3			Actions
Supporting Document 4			Actions
Supporting Document 5			Actions

Save

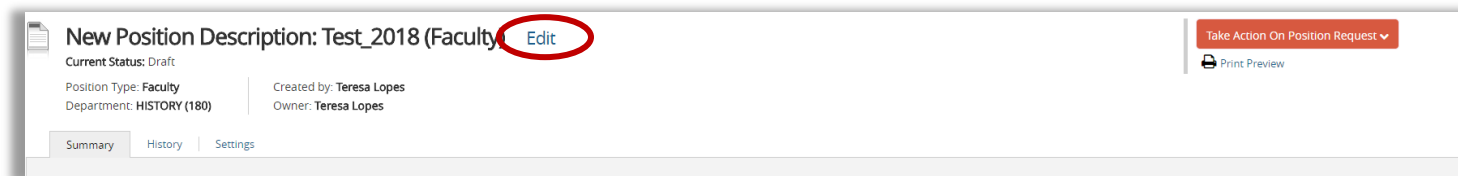
<< Prev

Next >>

New Position Request Summary

The next page will show your **drafted** position request. The top of this page will display Current Status, Position Type, Department, Created by, and Owner of position request.

Please review all details of your position request. If any changes need to be made you can select **Edit**.



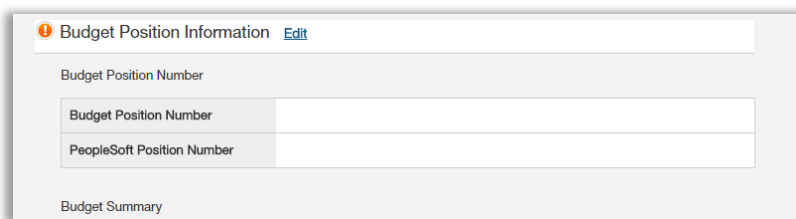
The screenshot shows the top section of the 'New Position Request Summary' page. The title is 'New Position Description: Test_2018 (Faculty)' with an 'Edit' link next to it. Below the title, it says 'Current Status: Draft'. To the right, there are buttons for 'Take Action On Position Request' and 'Print Preview'. Below this, it shows 'Position Type: Faculty', 'Department: HISTORY (180)', 'Created by: Teresa Lopes', and 'Owner: Teresa Lopes'. At the bottom, there are tabs for 'Summary', 'History', and 'Settings'.

NOTE: On the Position Request Summary page, you may also see **Currently: blank** under the information on the position request. **Currently: blank** means since your position is still in draft and not yet approved, this information is still currently blank. Once the position request moves in the workflow and is approved, the **Currently: blank** wording will no longer be visible.



The screenshot shows a 'Working Title' field. The text 'Test_2018' is entered in the field, and 'Currently: blank' is displayed below it.

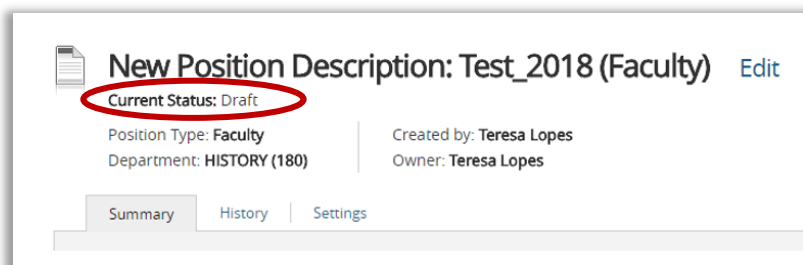
When all the tabs in the position request have been completed and you are on the position request summary page, the tabs that have **exclamation points** next to them indicates required information is missing that must be completed before **Taking Action on the Position Request**. Select **Edit** to fill out the missing information.



The screenshot shows the 'Budget Position Information' tab. It has an exclamation point icon next to the title. Below the title, it says 'Budget Position Number'. There are two input fields: 'Budget Position Number' and 'PeopleSoft Position Number'. At the bottom, there is a 'Budget Summary' section.

When the **Current Status** of a position request is in a **Draft** state, it means a position request has been started, but no action has been taken on the position request.

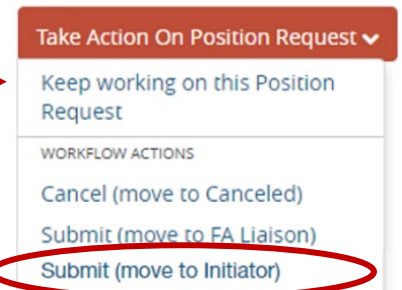
Only the individual who created the position request can edit or transition the position request to the next step in the workflow.



This screenshot is similar to the one above, but the 'Current Status: Draft' text is circled in red to highlight it.

To submit forward, hover over the **Take Action on Position Request** button.

When you are ready to submit your position request through the workflow to gain approval, choose either **Submit (move to Initiator)** or **Submit (move to FA Liaison)**.

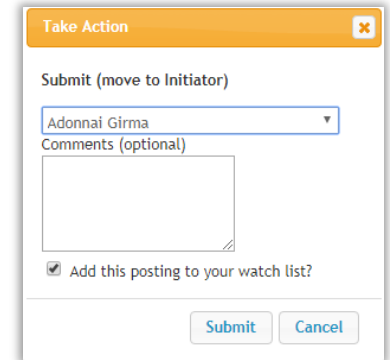


Option 1: Submit (move to Initiator)

This transition allows multiple **Initiator** account users to have the ability to edit the position request by taking it out of a "draft" state.

After clicking on **Submit (move to Initiator)**, the **Take Action** box will appear. Be sure to insert any additional comments in the **Comments** box. Only those in the workflow will have access to this information.

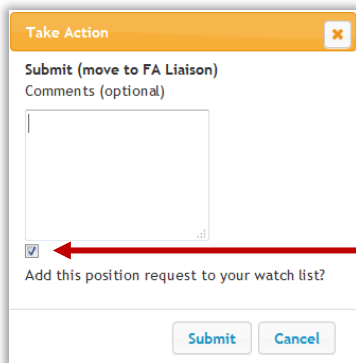
The box **Add this posting to your watchlist** will be automatically checked. If you would **not** like for this position to appear in your Watch List, uncheck the box.



Option 2: Submit (move to FA Liaison)

This transition allows multiple **Initiator** account users to have the ability to edit the position request by taking it out of a "draft" state.

After clicking on **Submit (move to FA Liaison)**, the **Take Action** box will appear. Be sure to insert any additional comments in the **Comments** box. Only those in the workflow will have access to this information.



The box **Add this posting to your watchlist** will be automatically checked. If you would **not** like for this position to appear in your watch list, uncheck the box.

Request to Modify a Position

Faculty Position Types

Revised 12.13.2018

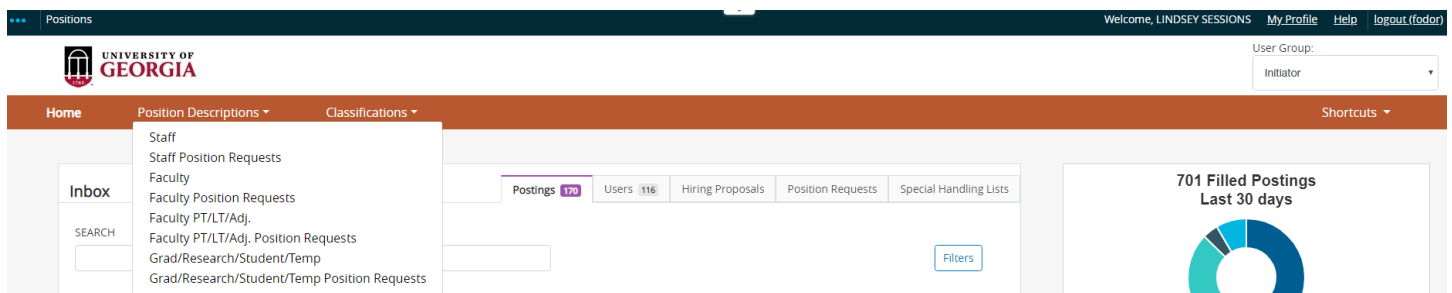
Modify an Existing Position Description

Modifying an existing position description allows you to update the position for various reasons including:

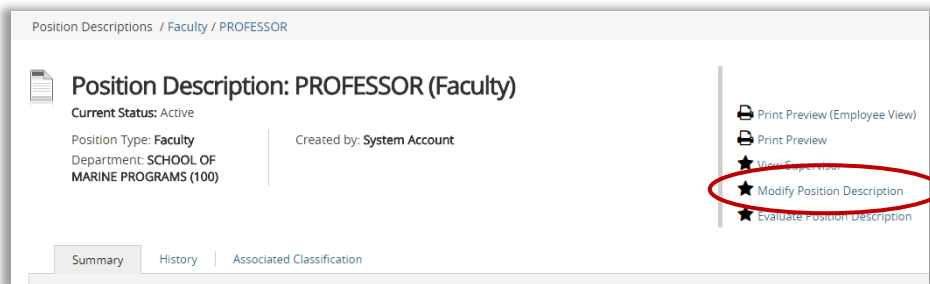
- ☐ Change position status active/inactive
- ☐ Change Major Unit
- ☐ Change Division
- ☐ Change Department
- ☐ Change Location
- ☐ Replacement of Employee
- ☐ Replacement of Supervisor
- ☐ Update Budget Details

When modifying a **Position Description** limited fields are available to edit. If changes need to be made to the **Position Details**, please submit an **Evaluate Position request** for that position.

To **modify** an existing position description, make sure that you are in the **Initiator** user role. In the **Position Module**, hover over **Position Descriptions** menu and select **Faculty** or **Faculty PT/LT** from the drop-down box.

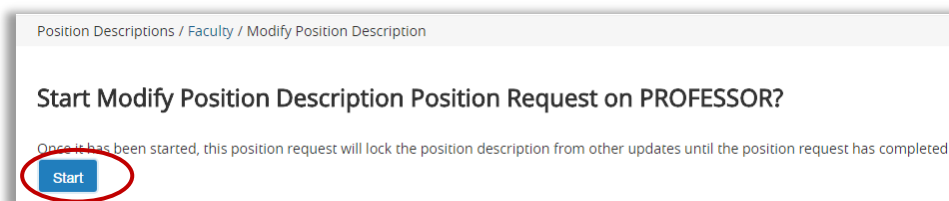


Search for the appropriate position description to modify. **Click on the working title** of the position you want to modify. Once you select the appropriate position description to modify, the following screen will appear:



Select **Modify Position Description** to begin your action.

The following Screen will appear confirming that you want to initiate this action and also to remind you that once a modification to a position request has started, the position description will be no longer be available for updates until the position request has been completed. Select **start** to begin.



Note: For more information on using the search function, see the guide for **Searching and Saving Searches**.

Modify Position Justification Tab

The **Position Justification** screen appears. This section allows you to justify your need for the position update.

Any box in red is a required field. Although there are required and non-required fields, the more detailed information you can provide Central HR the better.

Throughout the process of creating a position request, if needed, you can move from screen to screen using the page links located on the left sidebar.

Be sure to click on the **Save** button if you choose to utilize this feature. After clicking on the save button you can also use the **back button** to easily return to your previous page.

If you chose to click the **Next** button, your information will automatically be saved.

Modify Budget Position Information Tab

On this screen you can update the budget information, if this is the one of the justifications for modifying the position.

You also have the ability to add budget information. Click on the **Add Budget Summary Entry** button.

Once you select **Add Budget Summary Entry**, the following information will appear:

To remove an entry, check the **Remove Entry box** and then select **save**.

Modify Position Supervisor Tab

If one of the reasons for updating the position description includes **Replacement of Supervisor**, on the position supervisor tab, if there is an employee already seated in the position, search for the replacement employee then select the radio button next to their name.

Add Supervisory Position – Using the list of employees below, locate and select the supervisor who will directly oversee this position. If you are unable to locate the supervisor in the list provided, please notify Central HR with the following information, using the comment box which appears when transitioning a request in the workflow:

- Supervisor first and last name (If the position is vacant, type "vacant" in the comment box)
- Department name
- Budget position number

Once the request is submitted to Central HR, the appropriate supervisor will be selected based on the information provided.

Selected Supervisor

Job Title	VICE PRESIDENT view
Position Number	003VPRES01
Position Type	Faculty
Org Unit	F & A VP for Finance & Admin (H1000510)
First Name	
Last Name	
Email	emailaddress@zed.zed

Position Descriptions - [Filter these results](#)

All Positions [×](#)

"All Positions" [2](#)

Working Title	PeopleAdmin Position Number (former Budget Position Number)	Employee Last Name	Employee First Name	HR Department	Supervisor	(Actions)
Academic HR Professional	041ACADTest			OFFICE OF HUMAN RESOURCES		Actions ▼

Job Title	VICE PRESIDENT view
Position Number	003VPRES01
Position Type	Faculty
Org Unit	F & A VP for Finance & Admin (H1000510)
First Name	
Last Name	
Email	emailaddress@zed.zed

If you select **Save** or select the **Next** button, the replacement supervisor's information will automatically populate.

Modify Position Documents Tab

The following page allows you to upload any internal documents pertinent to this position. The documents will not be seen by applicants, only those in the Position Management workflow with access to the position.

Current and Proposed Organizational Charts are required for New Position Descriptions and Evaluations of Position Descriptions. Resume for Reclassification is only required when a request to reclassify an occupied position is being evaluated.

PDF conversion must be completed for the document to be valid when applicable.

Document Type	Name	Status	(Actions)
Current Organizational Chart			Actions ▼
Proposed Organizational Chart			Actions ▼
Resume for Reclassification			Actions ▼
Supporting Document 1			Actions ▼
Supporting Document 2			Actions ▼
Supporting Document 3			Actions ▼
Supporting Document 4			Actions ▼
Supporting Document 5			Actions ▼

The system will allow you to upload a new document, create a document within the system, or choose an existing document you have used for a previous position.

Select **Actions** and choose from the options provided:

- Create New
- Choose Existing
- Upload New

By selecting the option, **Upload New**, you will be taken to the below screen

Upload a Current Organizational Chart

To upload your document, provide a name and description of the document. To choose a file to upload, click the Choose File button and select the file from your computer. When you are ready to submit your document, click the Submit button.

Name

Description

File to upload No file chosen

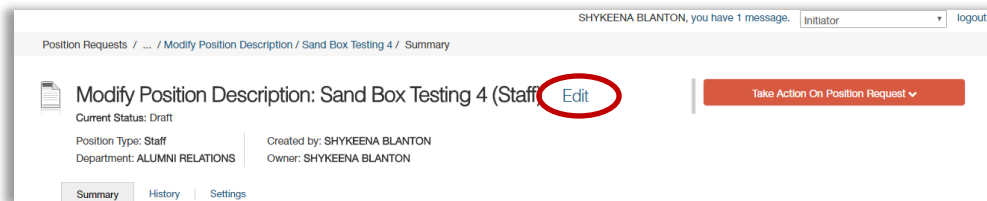
****Provide a name and description of the document, allowing other designated users the ability to view uploaded documents.**

Once a file is chosen to upload, and you are ready to submit your document, click the **Submit** button. You will then be taken back to the **Position Documents** main screen (see above).

The system will convert all documents into PDF's. All PDF conversions must be completed for the document to be valid when applicable. The document will transform into a *hyperlink* when the conversion is complete. You can also view the *status* of the conversion to determine if the upload was successful.

Modify Position Request Summary

The next page will show your **drafted** position request. The top of this page will display Current Status, Position Type, Department, Created by, and Owner of position request.

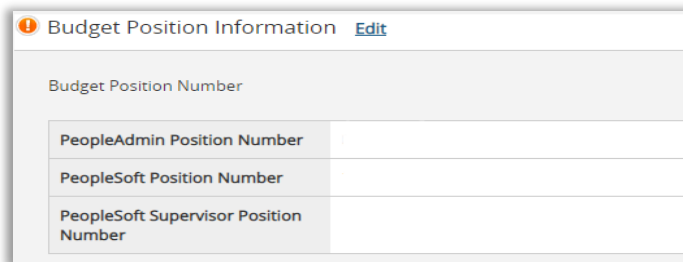


Please review all details of your position request. If any changes need to be made you can select **Edit**.

NOTE: On the Position Request Summary page, you may also see **Currently: blank** under the information you have just put on the position request. **Currently: blank** means since your position is still in draft and not yet approved, this information is still currently blank. Once the position request moves in the workflow and is approved, the **Currently: blank** wording will no longer be visible.



When all the tabs have been completed and you are on the position request summary page, the tabs that have **exclamation points** next to them indicates that there is required information missing that must be completed before **Taking Action on the Position Request**. Select **Edit** to fill out the missing information.

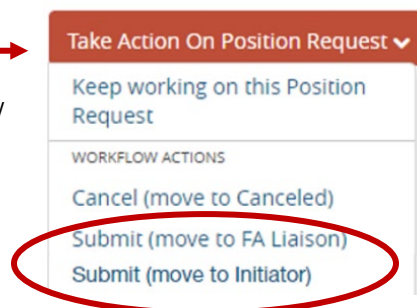
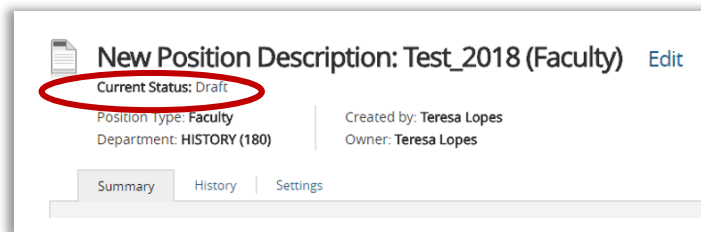


When the **Current Status** of a position request is in a **Draft** state, it means a position request has been started, but no action has been taken on the position request.

Only the individual who created the position request can edit or transition the position request to the next step in the workflow.

To submit forward, hover over the **Take Action on Position Request** button.

When you are ready to submit your position request through the workflow to gain approval, choose either **Submit (move to Initiator)** or **Submit (move to FA Liaison)**.

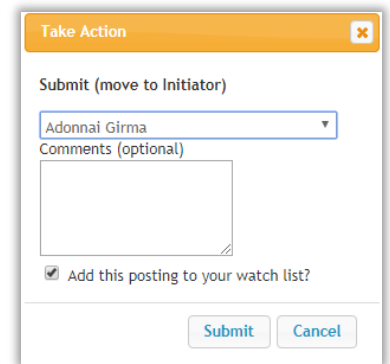


Option 1: Submit (move to Initiator)

This transition allows multiple **Initiator** account users to have the ability to edit the position request by taking it out of a “draft” state.

After clicking on **Submit (move to Initiator)**, the **Take Action** box will appear. Be sure to insert any additional comments in the **Comments** box. Only those in the workflow will have access to this information.

The box **Add this posting to your watchlist** will be automatically checked. If you would **not** like for this position to appear in your Watch List, uncheck the box.

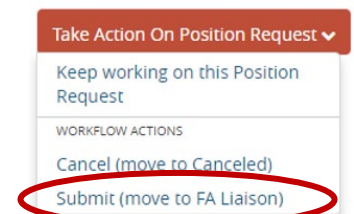


The 'Take Action' dialog box for Option 1 has an orange header. It contains a dropdown menu with 'Adonnai Girma' selected, a text area for 'Comments (optional)', a checked checkbox for 'Add this posting to your watch list?', and 'Submit' and 'Cancel' buttons at the bottom.

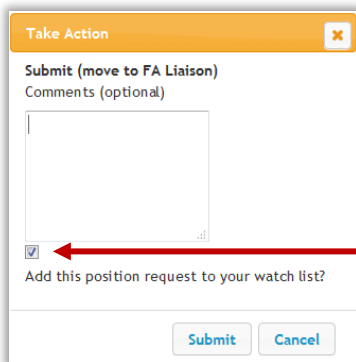
Option 2: Submit (move to FA Liaison)

This transition allows multiple **Initiator** account users to have the ability to edit the position request by taking it out of a “draft” state.

After clicking on **Submit (move to FA Liaison)**, the **Take Action** box will appear. Be sure to insert any additional comments in the **Comments** box. Only those in the workflow will have access to this information.



The 'Take Action On Position Request' dropdown menu has a red header. It shows 'Keep working on this Position Request' and a 'WORKFLOW ACTIONS' section with 'Cancel (move to Canceled)' and 'Submit (move to FA Liaison)'. The 'Submit (move to FA Liaison)' option is circled in red.



The 'Take Action' dialog box for Option 2 has an orange header. It contains a text area for 'Comments (optional)', a checked checkbox for 'Add this position request to your watch list?', and 'Submit' and 'Cancel' buttons at the bottom. A red arrow points from the text to the right to the checkbox.

The box **Add this posting to your watchlist** will be automatically checked. If you would **not** like for this position to appear in your Watch List, uncheck the box.

Request to Evaluate a Position

Faculty Position Types

Revised 12.13.2018

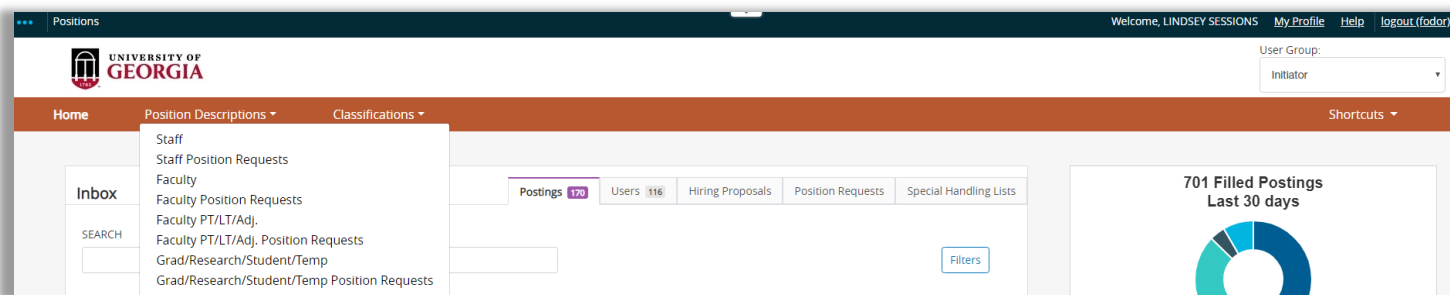
Evaluate an Existing Position Description

Evaluating an existing position description allows you to update the position for various reasons including:

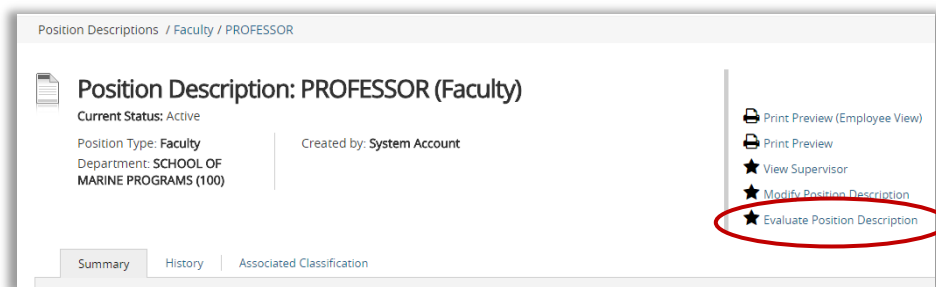
- ☐ Reclassify Occupied Position
- ☐ Replacement of Employee
- ☐ Reclassify Vacant Position
- ☐ Replacement of Supervisor
- ☐ Update Employee Position Description
- ☐ Update Budget Details

When evaluating a **Position Description** limited fields are available to edit. If changes need to be made to the **Position Details**, please submit an **Evaluate Position request** for that position.

To **evaluate** an existing position description, make sure that you are in the **Initiator** user role. In the **Position Module**, hover over **Position Descriptions** menu and select **Faculty** or **Faculty PT/LT** from the drop-down box.



Search for the appropriate position description to evaluate. **Click on the working title** of the position you want to evaluate. Once you select the appropriate position description to modify, the following screen will appear:



Select **Evaluate Position Description** to begin your action.

The following Screen will appear confirming you want to initiate this action and also to remind you that once an evaluation to a position request has started, the position description will be no longer be available for updates until the position request has been completed. Select **start** to begin.



Note: For more information on using the search function, see the guide for **Searching and Saving Searches**.

Evaluate Position Justification Tab

The **Position Justification** screen appears. This section allows you to justify your need for the position update.

Any box in red is a required field. Although there are required and non-required fields, the more detailed information you can provide Central HR the better.

Throughout the process of creating a position request, if needed, you can move from screen to screen using the page links located on the left sidebar.

Be sure to click on the **Save** button if you choose to utilize this feature. After clicking on the save button you can also **use the back button** to easily return to your previous page.

If you choose to click the **Next** button, your information will automatically be saved.

Evaluate Budget Position Information Tab

On this screen you can update the budget information, if this is the one of the justifications for modifying the position.

You also have the ability to add budget information. Click on the **Add Budget Summary Entry** button.

Once you select **Add Budget Summary Entry**, the following information will appear:

To remove an entry, check the **Remove Entry** box and then select **save**.

Evaluate Position Supervisor Tab

If one of the reasons for updating the position description includes **Replacement of Supervisor**, on the position supervisor tab, if there is an employee already seated in the position, search for the replacement employee, then select the radio button next to their name.

Add Supervisory Position – Using the list of employees below, locate and select the supervisor who will directly oversee this position. If you are unable to locate the supervisor in the list provided, please notify Central HR with the following information, using the comment box which appears when transitioning a request in the workflow:

- Supervisor first and last name (if the position is vacant, type "vacant" in the comment box)
- Department name
- Budget position number

Once the request is submitted to Central HR, the appropriate supervisor will be selected based on the information provided.

Selected Supervisor

Job Title	VICE PRESIDENT view
Position Number	003VPRES01
Position Type	Faculty
Org Unit	F & A VP for Finance & Admin (H1000510)
First Name	
Last Name	
Email	emailaddress@zed.zed

Position Description: Filter these results

All Positions ✕

"All Positions" 2

(Actions)

Working Title	PeopleAdmin Position Number (former Budget Position Number)	Employee Last Name	Employee First Name	HR Department	Supervisor
Academic HR Professional	041ACADTest			OFFICE OF HUMAN RESOURCES	Actions

Job Title	VICE PRESIDENT view
Position Number	003VPRES01
Position Type	Faculty
Org Unit	F & A VP for Finance & Admin (H1000510)
First Name	
Last Name	
Email	emailaddress@zed.zed

If you select **Save** or select the **Next** button, the replacement supervisor's information will automatically populate.

Evaluate Position Documents Tab

The following page allows you to upload any internal documents pertinent to this position. The documents will not be seen by applicants, only those in the Position Management workflow with access to the position.

The system will allow you to upload a new document, create a document within the system, or choose an existing document you have used for a previous position.

Select **Actions** and choose from the options provided:

- Create New
- Choose Existing
- Upload New

By selecting the option, **Upload New**, you will be taken to the below screen:

Once a file is chosen to upload, and you are ready to submit your document, click the **Submit** button. You will then be taken back to the **Position Documents** main screen (see above).

The system will convert all documents into PDF's. All PDF conversions must be completed for the document to be valid when applicable. The document will transform into a *hyperlink* when the conversion is complete. You can also view the *status* of the conversion to determine if the upload was successful.

Evaluate Position Request Summary

The next page will show your **drafted** position request. The top of this page will display Current Status, Position Type, Department, Created by, and Owner of position request.

Position Requests / ... / Evaluate Position Description / Sand Box Testing 4 / Summary

Evaluate Position Description: Sand Box Testing 4 (Staff) [Edit](#)

Current Status: Draft

Position Type: Staff

Department: ALUMNI RELATIONS

Created by: SHYKEENA BLANTON

Owner: SHYKEENA BLANTON

[Summary](#) [History](#) [Settings](#)

[Take Action On Position Request](#)

Please review all details of your position request. If any changes need to be made you can select **Edit**.

NOTE: On the Position Request Summary page, you may also see **Currently: blank** under the information you have just put on the position request. **Currently: blank** means since your position is still in draft and not yet approved, this information is still currently blank. Once the position request moves in the workflow and is approved, the **Currently: blank** wording will no longer be visible.

Working Title

Testing - DN

Currently: blank

When all the tabs have been completed and you are on the position request summary page, the tabs that have **exclamation points** next to them indicates there is required information missing that must be completed before **Taking Action on the Position Request**. Select **Edit** to fill out the missing information.

Budget Position Information [Edit](#)

Budget Position Number

PeopleAdmin Position Number	
PeopleSoft Position Number	
PeopleSoft Supervisor Position Number	

When the **Current Status** of a position request is in a **Draft** state, it means a position request has been started, but no action has been taken on the position request.

Only the individual who created the position request can edit or transition the position request to the next step in the workflow.

New Position Description: Test_2018 (Faculty) [Edit](#)

Current Status: Draft

Position Type: Faculty

Department: HISTORY (18)

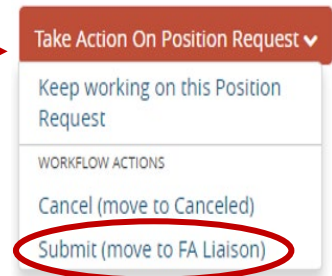
Created by: Teresa Lopes

Owner: Teresa Lopes

[Summary](#) [History](#) [Settings](#)

To submit forward, hover over the **Take Action on Position Request** button.

When you are ready to submit your position request through the workflow to gain approval, **Submit (move to FA Liaison)**.



Submit (move to FA Liaison)

After clicking on **Submit (move to FA Liaison)**, the **Take Action** box will appear. Be sure to insert any additional comments in the **Comments** box. Only those in the workflow will have access to this information.

A screenshot of a "Take Action" dialog box. The title bar is orange and says "Take Action" with a close button. The main area has a header "Submit (move to FA Liaison)" and a sub-header "Comments (optional)". Below this is a text input field. At the bottom, there is a checkbox that is checked, with the text "Add this position request to your watch list?" next to it. Below the checkbox are two buttons: "Submit" and "Cancel". A red arrow points from the text "The box Add this posting to your watchlist will be automatically checked." to the checked checkbox.

The box **Add this posting to your watchlist** will be automatically checked. If you would **not** like for this position to appear in your Watch List, uncheck the box.



Position Management Tips & Tricks

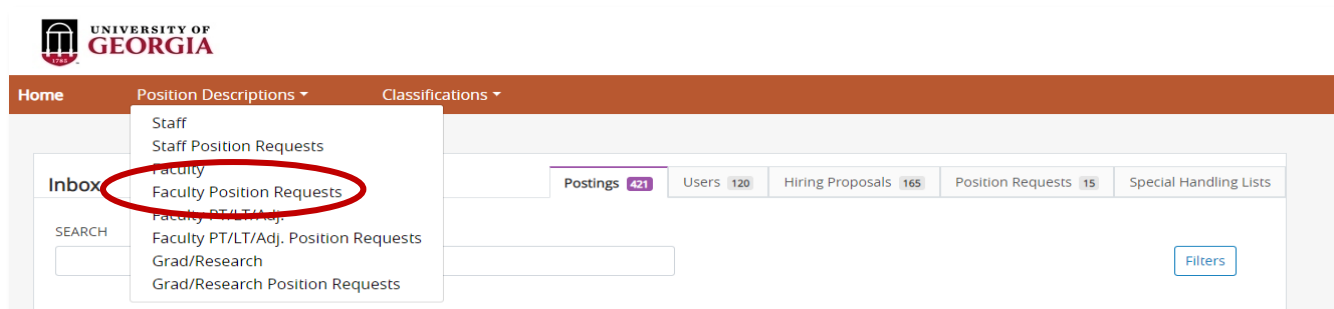
**Faculty
Position Types**

Revised 12.13.2018

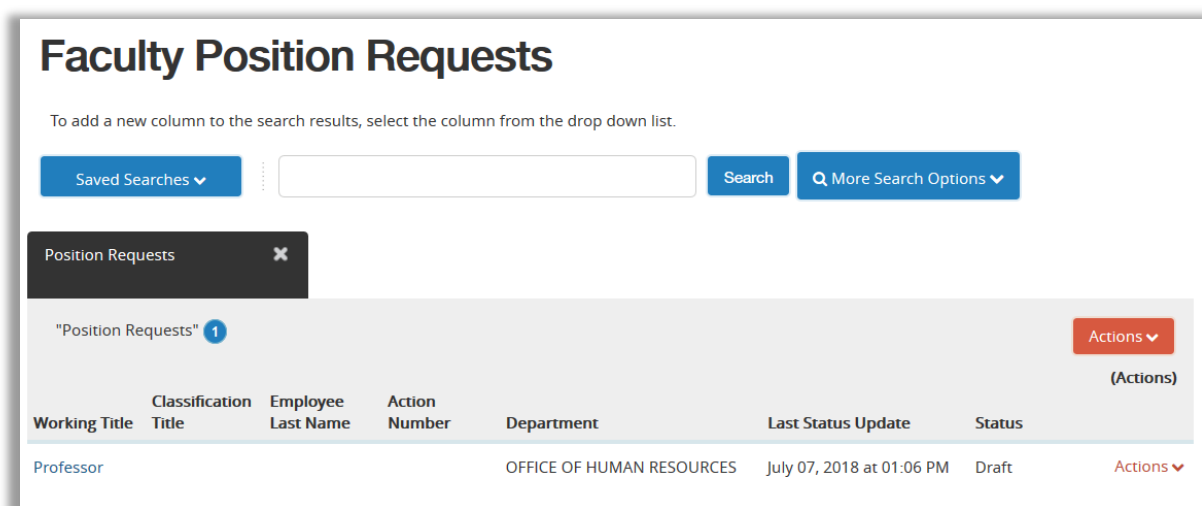
Find my Position Request

A **Faculty or Faculty PT/LT/ADJ** Position Request is a **Position Description** request that is in process or saved (New, Modify, or Evaluate).

To view or continue editing a Position Description, Modify or Evaluate that is in process, in the **Position Module**, hover over **Position Descriptions** tab and select **Faculty Position Requests** from the drop-down box.

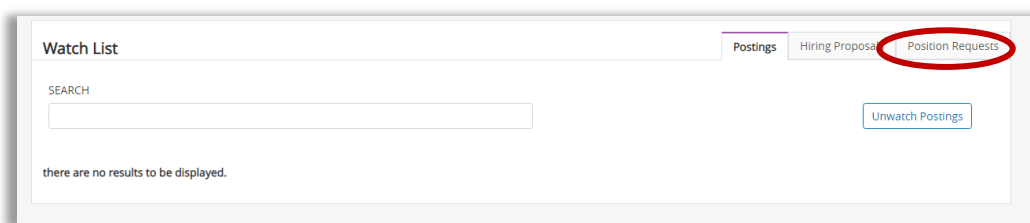


The **Position Request** page reflects the listing of actions that are currently in progress such as Draft, Approver, FA Liaison, Unit Head, Central HR, etc.



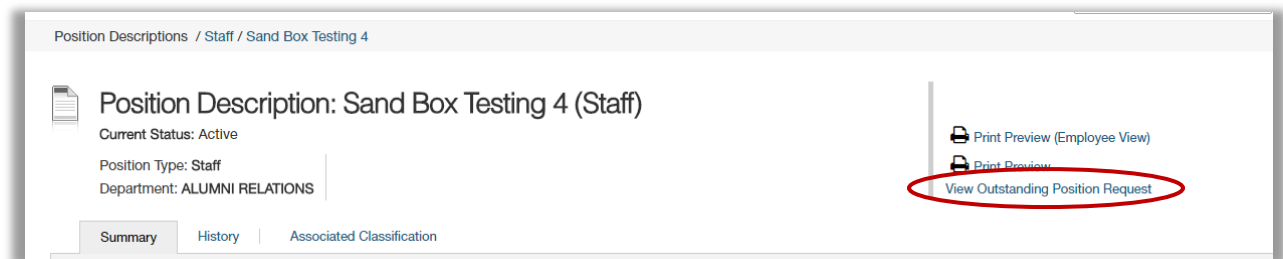
Note: Position Request that have been Approved are available in the listing of Position Request, however, Positions that are Approved can only be viewed and are no longer editable.

You can also keep up with the workflow state of your position request in the Watch list on the home tab. **See the *Guide on Inbox and Watch list* for more information.**



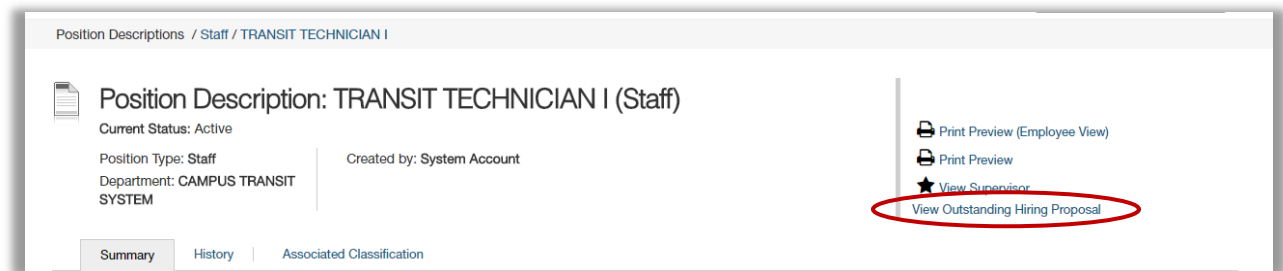
Outstanding Position Request or Hiring Proposal

An outstanding position request means that either a modify or evaluate is in progress and needs to be completed and has not been approved in order to initiate another modify or evaluate. **Click the View Outstanding Position Request link** to continue working on the Position request if you initiated the request and did not finish. If someone else initiated the request, you will only be able to view not edit.

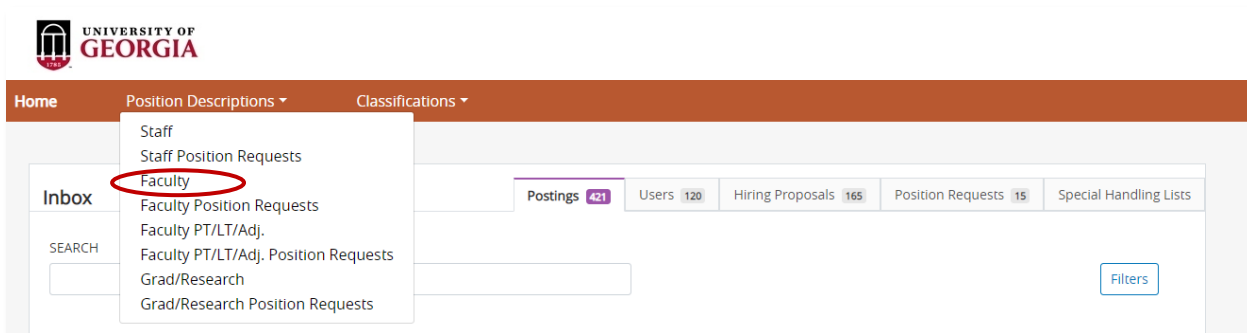


An outstanding Hiring Proposal means that a Hiring Proposal is in progress and needs to be completed and has not been approved in order to initiate another modify or evaluate.

Click the View Outstanding Hiring Proposal link to continue working on the Hiring Proposal if you initiated the Hiring Proposal and did not finish. If someone else initiated the Hiring Proposal, you will only be able to view not edit.

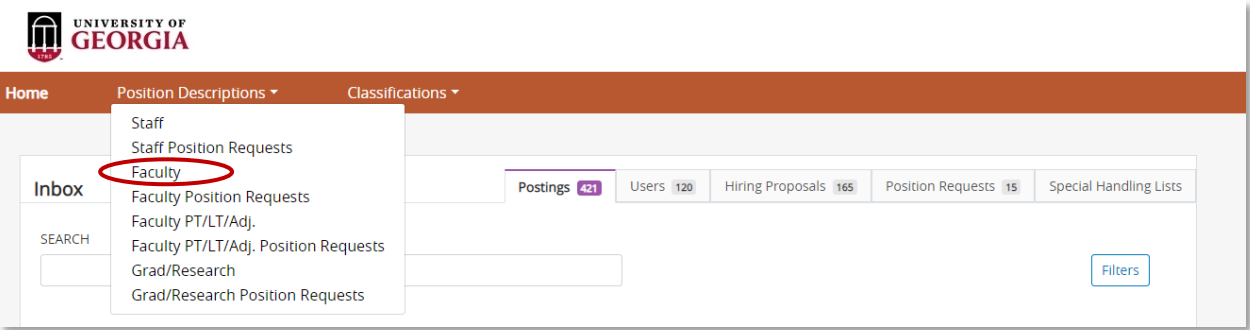


You would typically see an outstanding position request or Hiring Proposal if you go to the Position module, hover over the Position Descriptions tab and click the Faculty option.

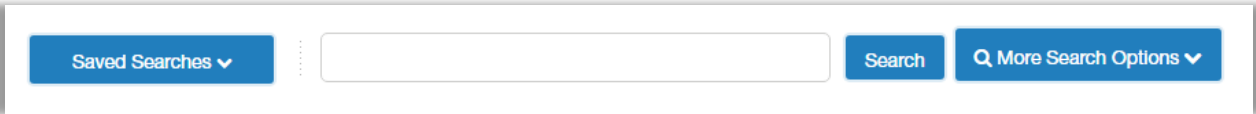


Navigating Classifications Tab

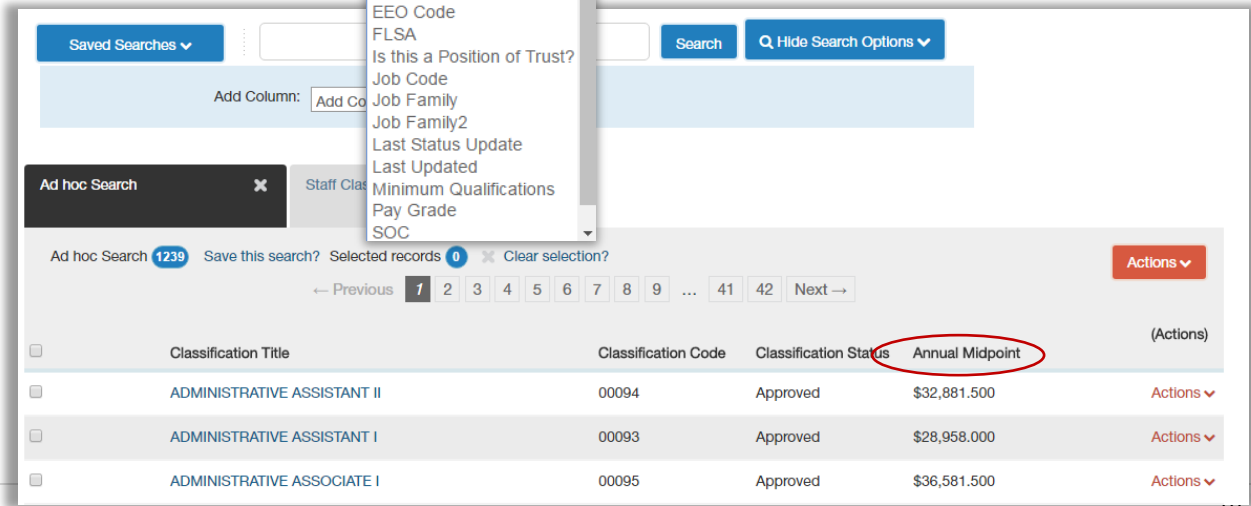
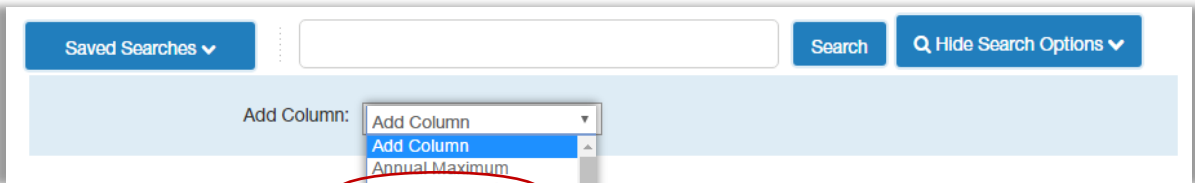
The Classifications tab holds a library of staff classification. To Search through these classifications, in the position management module hover over the **Classifications tab** and then select **Faculty**.



Once you are on the Staff Classifications webpage, you will see a list of Classifications. To search for a specific classification use the search bar to enter in specific information, for example, Classification Title or Classification Code.



You also have the ability to customize your search by adding in a specific column. Select the **More Search Options** button. Hover over the **Add Column** feature and select what information you would like to see. The page will update automatically to show the column you have added.





What Happens Next: Request to Post

**Faculty
Position Types**

Revised 12.13.2018

What Happens Next

Your position will go through the entire workflow to get approved. While it is traveling through the workflow, you will be able to see each time it moves to a new level of the workflow.

At any given time, a position may be sent back to you before it is approved. If this is the case, make sure you view the comments and correct any issues. You would then have to resubmit the posting back through the entire workflow again until it has reached Central HR and is officially approved.

Initiators will receive an email notification once your **Faculty** position has been approved.

Request to Post a Faculty Position

