

Quick Reference Guide – Creating a new Position Description and viewing Position Descriptions

What you need to do What you will see Job description STEP 1: Create a new Position Work Type Supervisor Name **Description** Click Manage position descriptions and create a new requisition on dashboard. Click New position description job description page. POSITION DESCRIPTION INFORMATION You will be presented with the Position To edit an approved Position Description scroll to the bottom of the form and press Update PD Click OK in the pop-up window that appears to reset the approval process **Description Information page** JUSTIFICATION FOR THE ACTION Relevant information about the job will be Type of action requested:* Select entered on the Position info tab. 0 Reason for request:* 0 Select Ensure you complete all mandatory fields Justification for the (these are marked with an asterisk). STEP 2: Using the Notes tab The Notes tab is a great way to record Position info Notes Documents extra information about the PD. Add: Select 😊 The Notes tab will be used to add notes against the PD. Next page You can record notes for yourself and also Save a draft Save Save & exit Cancel Spell check send e-mails about the job from the Notes tab. Notes Documents STEP 3: Using the Documents tab The Documents tab is used to attach Cancel Spell check organizational charts or other documentation. Upload a new document Upload file S Dropbox Document Position description



STEP 4: Saving the job

When all job details have been entered, click Save to save and submit the PD for approval or Save & Exit to save and submit the PD and exit the position description. Save a draft can be used when you need to save the position description you are working on and come back to work on it at a later time.



STEP 5: Viewing a job

Click Manage jobs on the right hand navigation menu.

You can choose to view all jobs, or filter the page to only display certain jobs (note that you will only see jobs that relate to the team/s that you have access to).

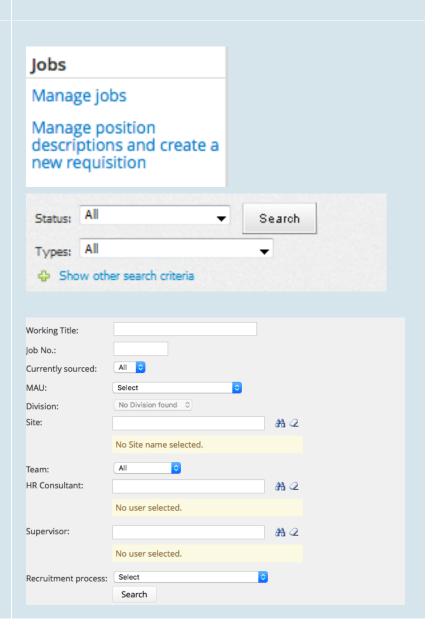
You can filter jobs by status by selecting a status from the Status drop-down list on the left-hand side of the page. For example, you may want to view all jobs in an 'Offer' status.

Click Show other search criteria to view other criteria by which you can filter your search on.

You may choose to search for jobs by working title, job number, or any other available criteria.

Click the Search button on the right-hand side of the page.

Identify the job that you would like to view, and click Edit.



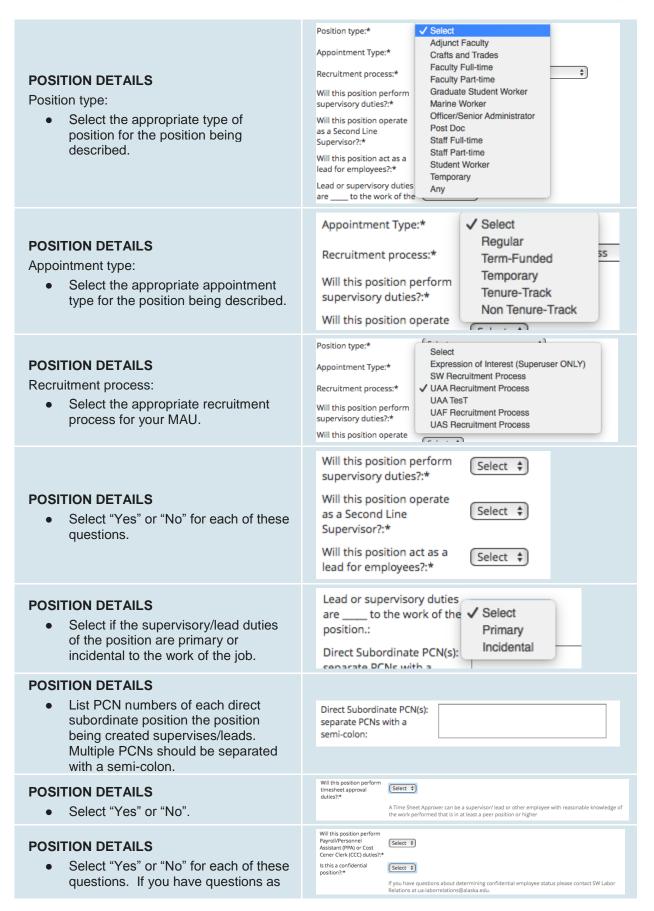
Quick Reference Guide – Creating a Position Description (PD)

This will walk you through all the fields for creating a Position Description (PD).

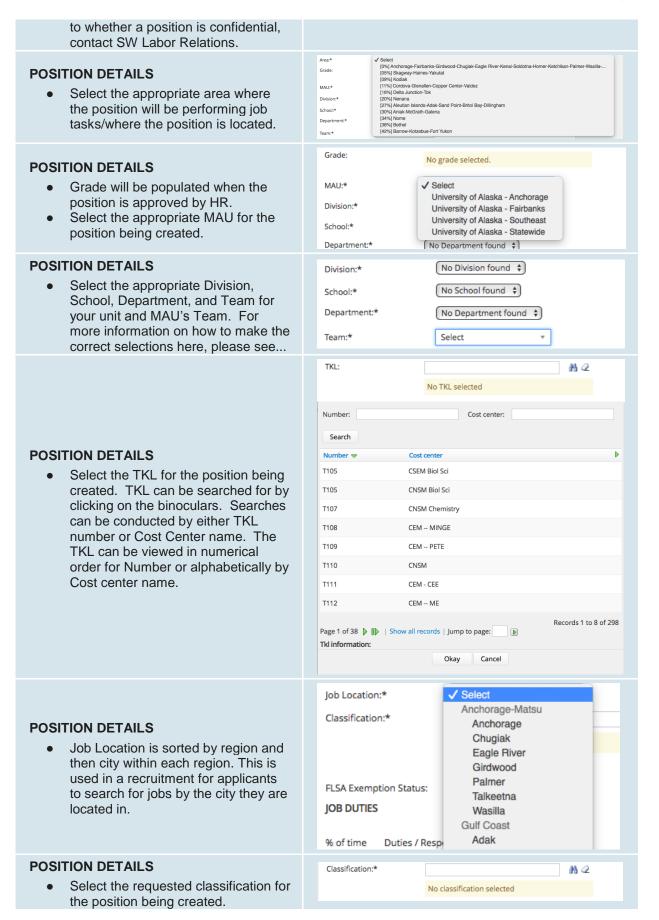


What you need to do	What you will see
JUSTIFICATION FOR THE ACTION Type of action requested: Select New Position when the PD you are creating is a new position. Select Modification when working on a job with an existing PD.	JUSTIFICATION FOR THE ACTION Type of action requested:* Select New Position Modification
JUSTIFICATION FOR THE ACTION Reason for request: • Select Recruitment when the PD you are creating will be used for a recruitment. • Select Update/Reclassification when working on an existing PD.	JUSTIFICATION FOR THE ACTION Type of action requested:* Reason for request:* Recruitment Reason:* Select Recruitment Update/Reclassification
JUSTIFICATION FOR THE ACTION Recruitment Reason: • Select the appropriate reason for creating or modifying the PD being used for the recruitment.	JUSTIFICATION FOR THE ACTION Type of action requested:* Reason for request:* Recruitment Reason:* Justification for the Position:* Justification for the Position: Resignation Termination Leave coverage Restructure Family Medical Leave Other
JUSTIFICATION FOR THE ACTION Justification for the Position: • Use this field to make notes as to why the PD is being created or updated. These notes can be used to communicate with approvers, supervisors, or HR.	JUSTIFICATION FOR THE ACTION Type of action requested:* Reason for request.* Select
Position DETAILS Position number: • Populated once the job is approved by HR and Budget/Grants has assigned a Position number to the job. Working Title: • The working title for the position being described.	POSITION DETAILS Position number: No position selected. Working Title:*











Classification can be searched on Classification number: Classification title: using the binoculars. Search Classification number > Classification title Performance - Manager with direct reports 01001 Administrative Management 1 01002 Administrative Management 2 01003 Administrative Management 3 01004 Administrative Management 4 01005 Administrative Management 5 Administrative Generalist 1 01201 01202 Administrative Generalist 2 Records 1 to 8 of 372 Classification information: Okay Cancel **POSITION DETAILS** Classification:* AA Q Administrative Generalist 1 Once a classification is selected for Classification title: Administrative Generalist staff positions using the job family system, click Classification title to PCLS Code: 01201 see more information about the job. Information from the job classification FLSA Exemption Status: Non-Exempt is here for you to reference when Grade (Payscale Name): Temporary Staff Grade listing job functions, knowledge, skills, abilities, education, and ECLS: Non-Exempt Staff - Regular experience on the PD. **JOB DUTIES** Click the New button. Fill in the percentage of time, and description JOB DUTIES of each task [group of tasks] that will % of time Duties / Responsibilities be performed by this position. Also There are no items to show select if these functions are essential Essential or marginal to the position. When you have added all the information for each task [group of tasks] click the Add button. Multiple duties are added by selecting new for each task [group of tasks]. **JOB DUTIES** Each of these sections should be filled in with the appropriate information that is required to perform the essential duties of the Typical Education or Training:* position. **JOB DUTIES** Advertising summary should be about three sentences (or less) and Advertising summary:* summarizes the work of the position. This short description of the work performed is used when recruiting for

the position.



Advertising text is a longer description of the work that will be performed by this position. This information is displayed during a second during the	Advertisement text:* Tip: To poste text, press CTRL + V. Format selection
information is displayed during a recruitment.	Please provide a brief description of your department and pertinent job information not listed in the duties and KSAs.
 Check all the boxes that apply to the position's budget responsibilities. Fill in the size of the annual budget the position has the responsibility for. Indicate the amount for "Responsible for authorizing expenditures" if the box is checked in the above section. Indicate anything that would be considered an "Other" budget responsibility that might be relevant to the position. 	Describe budget responsibility of this Maintains budget and fiscal records Develops budget Manages overall budget Forecasts expenditures Manages overall budget Manages expenditures Mone None
PEER POSITIONS	
 Fill in any relevant information on positions that might be considered peers for the position being created. If available, list PCN, Incumbent Name, Incumbent Classification, Department, and MAU. 	PEER POSITIONS Peer Position Info:
LABOR DISTRIBUTION	
 Fill in the Fund, Org, and Percentage of funding the labor should be charged to for the position. There are four (4) Fund, Org, and Percentage fields available. One is required. 	LABOR DISTRIBUTION Fund:* Org:* Percentage:* © %
USERS AND APPROVALS	
Select the appropriate HR Consultant for your MAU/unit. Next, select the Time Sheet Approver, and Supervisor for the position. You can either type the name of the appropriate individual in this box, or click on the binoculars to search for the appropriate individual. This information will be fed to Banner at a later time.	USERS AND APPROVALS HR Consultant.* No user selected. Time Sheet Approver: No user selected. Supervisor:* Ath @ No user selected.
USERS AND APPROVALS	
Select the appropriate Approval Process. This information is dependent upon the MAU you selected in the Position Details section. Here you can either type the name of the appropriate individual in the boxes, or click on the binoculars to search for the appropriate	Approval process:* None \$



individual(s). This information is used to route the job for approval(s).	
Saving the job When all job details have been entered, click Save to save and submit your PD or Save & Exit to save, submit, and exit the position description. Save a draft can be used when you need to save the position description you are working on and come back to work on it at a later time.	Save a draft Save Save & exit Cancel Spell check
 Attach Org Charts here prior to submitting the PD for approvals. 	