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Position Management

QUICK REFERENCE GUIDE

Position based budgeting

Define each position
Identify what unit it belongs to
Identify what employment group it belongs to
Record the organizational hierarchy
Provide a job description
Identify funding (source, amount, duration)
Cross reference positions to people (via HRMS)
Feed this information to the new Budget system

Prepared by:
UBC Human Resources
H.R. Management Systems
Electronic version available at: http://www.hr.ubc.ca/information-systems/hrms/hrms-manuals/

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Quick Chart

Create a new position.

Update an existing position.

Copy a position.

Search for positions university-wide.

Position Screens

(classification / appt)

- Includes the job description, department and classification info.
- Has its own unique 8 digit number.
- Position and job descriptions are viewable and searchable by all recruiters.
- Compensation approval required on M&P and BCGEU positions.
- Faculty Relations approval required on tenure track faculty positions.
- Contains eRecruit approver information.
- Upload documents
- Review incumbents

Add position budget information.

Budget Screen

(funding)

- Control the interface to budget system.
- Provide information on source, amount and duration of funding.
- Requires signing authority approval.

Quick Steps

(Section column refers to section in the Position Management Training manual)

Steps	Section
Position Management	
• To create a new position go to step 1.	
• To update an existing position go to step 2.	
• To copy a position go to step 3.	
• To delete a position go to step 4.	
Step 1: New Position	
• Add a new position from scratch or copy an existing position from your own or another department.	
• If you find an existing position that's close to what you need, you can copy it from the search results page. Go to step 3 for more information on copying. Add New Position	Update	Copy	Back to Search Page	
• A position has 2 parts – a classification/appointment part and a financial part. • Position management can be accessed via a single sub-menu under the main Position Management menu. • You can also access Position Management from the Administrator Self-Service tab. Applications	Administrator Self-Service	Resources	UBC Development • The classification/appointment screens define the department, employment group, reporting hierarchy, job description and position length. It also identifies approvers in later eRecruit steps. • The budget screen defines the amount, source and duration of position funding. It also identifies where the Budget system should look to get salary/benefit commitment information for filled positions – the Position or the hire data in HRMS.	2.1 1.0 1.0
• You create a position just once for your organization. If the job becomes vacant again in the future (months, years, etc), then you can immediately start the recruiting process unless the job description, funding or other position parameters need tweaking, then, via step 2, you just make a change to what was previously entered. It may be necessary to have your changes approved.	
• If you are going to post the position in eRecruit ensure that the posting box is checked. Will you be posting this position? ☐ • If you check this box, you will be required to provide a job description and identify eRecruit approvers.	2.2
• Each component (classification and budget) has a 'Save and Submit' button to submit that portion of your position for approvals. Save and Submit • Click the 'Save for later' button to save your position in draft mode. The position can't be posted if it is in draft mode. Save for Later	2.2
• Your position must have an approval status of 'Approved' before you can use your position in the Budget, eRecruit and eForms systems. Check the approval status flag on the Position Information tab.	2.2
• Once saved, each position is given a unique 8 digit number.	2.2
WORKFLOW APPROVALS: • Your position must have all information completed when you click the Save and Submit button. It will be automatically sent for approvals if required. • If your position is a staff position and it's not M&P or BCGEU-OK, it's not necessary for it to be approved by HR. You can optionally send it for review by clicking on the check box below located on the Job Description tab. Optional classification review requested ☐ • Funding information: Initially, there are no built-in approvals. However, approvals will be added in early 2011 using speedchart signing authorities.	2.3

Steps	Section
Step 2: Update An Existing Position	
• Do this step if you need to update an existing position because: a. It has been pushed back for corrections by an approver. b. The job description, funding or other position data has changed.	2.4
• If your position fields are not updateable, click the small + (plus) sign near the upper right corner of the screen to add a new Event date. Click on plus icon to enter changes • The + (plus) sign appears on the top right corner of the Position Information tab: Position Information | Job Standard/Benchmark | Qua • All Events are stored separately to provide a chronological history of the changes a position has undergone. • An Event might be caused by changes to a job description, funding, FTE, reporting hierarchy, etc. • Each Event is stored with the date that the Event became effective. All Events retain the same position number. First 1 of 3 Last • If you create 2 Events with the <u>same date</u> the system will increase the Sequence number automatically on the second Event. This will let the system know which record is the most recent. * Sequence: 0 The 0 will need to be changed to 1 on the second identical date.	2.4
• Click the 'Save and Submit' button to submit your position for approvals. Save and Submit • Click the 'Save for later' button to save your position in draft mode. The position can't be posted if it is in draft mode. Save for Later	2.4
WORKFLOW APPROVALS: • If your position was previously approved and you change the job description/ad or the classification, the system will automatically resubmit your position for approval. • If you change any funding information, the system will automatically resubmit your position to your Signing Authority approvers (this feature to be implemented early 2011).	2.3
Step 3: Copy a Position	
• Search for a position by employment group, department, or job title. • The bottom of the search results page has a Copy button. Click the check box to the left of the position you'd like to copy and then click the Copy button. Add New Position | Update | Copy | Back to Search Page • Some position information will not be copied (reports to, funding, comments, FTE, department, attachments, approvers, etc). You must fill this in yourself. • Please review the job description/ad to ensure it suits the needs of your unit and add eRecruit approvers. • When complete hit 'Save & Submit'. Save and Submit	2.5
Step 4: Delete a Position	
• Under the position management menu, locate Delete Positions. • Click Search to find previously entered Run Control values. Search • Click Add New Value if you've never previously created a Run Control. In the **Run Control ID** field, enter any value you wish**.** Note that all Run Control ID's you create must be in one string (multiple words must be stringed together with an underscore). Find an Existing Value | Add a New Value • Enter the position numbers you wish to delete and click on the Run button. Run • You can not delete positions which have been used to create Job Openings in eRecruit and positions which are attached to an active employee's job record. • In the **Server Name** field, click on the down arrow and select **PSUNX**. Click on the Run button. Server Name: PSUNX OK • A **Process Instance** number should now appear, indicating that you've successfully launched the deletion process. The process takes about 1 minute for each delete.	2.6