Position Management Steps SHRA

Steps to View, Update/Reclassify, and Create Position Descriptions

Viewing a Position Description

Step 1 Click on the three circles in the upper left side of the screen and select POSITIONS from the drop-down menu.

Step 2 Click on the **Position Descriptions** tab and select **SHRA** from the drop-down box.

Step 3 Search for the appropriate position description (by position number, name, etc.).

Step 4 Hover over **Actions** drop-down (right side of the screen) and select **View**.

Update/Reclassify Position Description – Assistant Coordinator/Supervisor

Step 1 Click on the three circles in the upper left side of the screen and select POSITIONS from the drop-down menu.

Step 2 Click on the **Position Descriptions** tab and select position type from the drop-down box.

Step 3 Search for the appropriate position description to modify (by position number, name, etc).

Step 4 Hover over the **Actions** drop down (right side of the screen) and select **View**.

Step 5 Review summary and select **Modify Position** (star on the right side of the screen).

Step 6 Click **Start**.

Step 7 When all the tabs have been completed, the system will move to the PD Action Summary page.
If there is missing required information in a section, an exclamation point shows next to the tab title. All sections must be completed prior to moving the PD Action to the next stage. Complete any sections containing the exclamation point by selecting the Edit button next to the tab title.

Step 8 From the Action Summary page, hover over **Take Action on PD Action** (orange button, upper right side of the screen) and move to **HR Compensation** for review.

Step 9 Add any comments in the Comment Box, keeping in mind comments become a permanent part of the recruitment record and cannot be removed. The position will be added to the Watch List by default.

Step 10 Once the position has been reviewed, HR Compensation will move the position back to the Assistant Coordinator/Supervisor for review. The position can be found on the Home page either in the Inbox under the PD Action tab or in the Watch List under the PD Action tab.

Step 11 Review the HR Compensation analysis. On the Action Summary page, hover over the **Take Action on PD Action** (orange button, upper right side of the screen) and return to HR Compensation or proceed to **Department Budget** for processing.

Update/Reclassify Position Description – Department Budget

Step 1 Click on the three circles in the upper left side of the screen and select POSITIONS from the drop-down menu.

Step 2 Click on the **Position Descriptions** tab and select **SHRA PD Actions**.

Step 3 Click on the position title to bring up the position description. Review the summary page for details about the new position. As Department Budget Approver, only certain tabs are editable.

Step 4 Click **Edit** next to the Position Funding section on the summary page. Edit any details and include

any comments necessary. Click **Next**.

Step 5   Click **Next** again to the Posting Details section. Edit any details on this screen and click **Next**.

Step 6   From the Action Summary page, hover over **Take Action on PD Action** (orange button, upper right side of the screen) and move to **Division Approver**. Add any comments in the Comment Box, keeping in mind comments become a permanent part of the recruitment record and cannot be removed. Be sure to click the Add to Watch List box prior to sending the position to the next stage if you want to follow the status of the position.

Update/Reclassify Position Description – Division Approver

Step 1   Click on the three circles in the upper left side of the screen and select POSITIONS from the drop-down menu.

Step 2   Click on the **Position Descriptions** tab and select **SHRA PD Actions**.

Step 3   Click on the position title to bring up the position description. Review the summary page for details about the position.

Step 4   Once review is complete, hover over the **Take Action on PD Action** (orange button, upper right side of the screen) and move to **University Budget**. Add any comments in the Comment Box, keeping in mind comments become a permanent part of the recruitment record and cannot be removed. Be sure to click the Add to Watch List box prior to sending the position to the next stage if you want to follow the status of the position.

Update/Reclassify Position Description – University Budget

Step 1   Click on the three circles in the upper left side of the screen and select POSITIONS from the drop-down menu.

Step 2   Click on the **Position Description** tab and select **SHRA PD Actions**.

Step 3   Click on the position title to bring up the position description. Review the summary page for details about the new position.

Step 4   An exclamation point will appear next to the Position Details tab. Click on **Edit**.

Step 5   Fill out the position number in the red box. Click **Next**.

Step 6   Edit Position Funding tab if needed, if not, click the **PD Action Summary** from the navigation tabs on the left hand side of the screen. Review information one last time.

Step 7   Once review is complete, hover over the **Take Action on PD Action** (orange button, upper right side of the screen) and move to **HR Compensation**. Add any comments in the Comment Box, keeping in mind comments become a permanent part of the recruitment record and cannot be removed. Be sure to click the Add to Watch List box prior to sending the position to the next stage if you want to follow the status of the position.

Creating a New Position Description – Assistant/Coordinator

Step 1   Click on the three circles in the upper left side of the screen and select POSITIONS from the drop-down menu.

Step 2   Click on the **Position Descriptions** tab and select **SHRA** from the drop-down box.

Step 3   Select the orange **Create New Position Description** button (right side of the screen).

Step 4   In the pop-up box, select **Create New Position and Posting**.

Step 5   Complete Working Title, Division, College/Area, and Department (if applicable). Select **Start PD Action** (orange button, upper right side of the screen).

Step 6   Complete the various required fields on each tab of the request.

Step 7   Follow the steps 7-11 from the Update/Reclassify Position Description – Assistant Coordinator instructions. Be sure to check the Add to Watch List before sending to the next section of the workflow.

Creating a New Position Description – Department, Division & University Budget

Follow all steps from the Update/Reclassify Position Description instructions. Be sure to click the Add to Watch List box prior to sending the position to the next stage if you want to follow the status of the position.