



Introduction

Process and Trigger

Use this procedure to create a Staff Exempt or Non-Exempt position.

Prerequisites.

- Check your Org Structure to determine if a similiar position to the one you want to create already exists. If this is tthe case, obtain the Position ID.

Menu Path

Use the following menu path to begin this transaction:

- BUworks Central Portal ➔ Manager Self-Service or Payroll Coordinator ➔ Organization

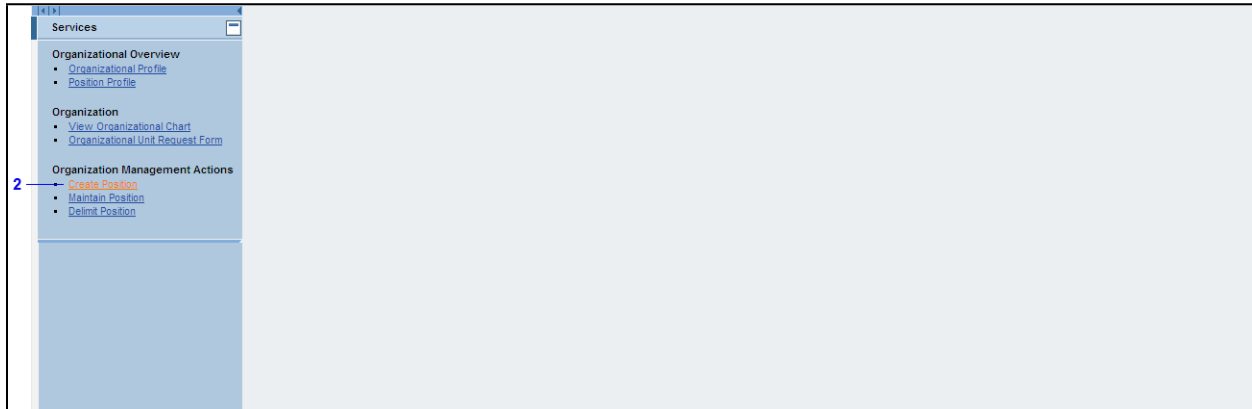
Tips and Tricks

- The forms do not have a save function that allows you to leave the form and complete at a later time. Best practice is once you start the form you need to complete the form.
- If you are unsure of what Job Code to enter use 20001554 (To Be Determined, TBD). Compensation will assign the correct job code when they see the position form via Workflow approval.
- You can use the matchcode search buttons located to the right of the entry fields to find the data you need for that field.
- You can use the position "Blurb" and "Essetial Functions" to build a position description once you get to the additional data tab.
- At times you may need to use your scroll bar to view additional information.

Procedure

1. Start the transaction using the above menu path or transaction code.

Organization - DPO - Windows Internet Explorer



2. Click the **Create Position** link label [Create Position](#).

Department Input

The screenshot shows the 'Department Input' form. At the top, there is a navigation bar with tabs: 1 Action Type, 2 Position Details, 3 Cost Distribution, 4 Descriptions, 5 Essential Functions, 6 Requirements, 7 Additional Data, and 8 Overview. The 'Action Type' tab is selected. Below the tabs, there is a section titled 'Type of Action' with a 'Refresh' button. Below this, there is a 'Number of Positions' field with the value '1'. Below that, there are two radio buttons: 'Create from Job' (selected with a blue arrow and the number 3) and 'Copy from Position' (with a value of '00000000' and a 'Select Position' button). Below the radio buttons, there is an 'Attachments' section with a 'File Name' table and a 'Select File' field with a 'Browse' button. The 'Create from Job' radio button is highlighted with a blue arrow and the number 4.

3. Click the **Create from Job** radio button ☐ Create from Job.



On the Create Position form, you have 2 options for creating a position:

1. Create from Job- This option allows for a position to be created using a Job Code. If you are unsure what job code to enter, enter 20001554 (To Be Determined)

2. Copy from Position (This is the default choice that will appear initially on the screen)- Use this option when the new position will be the same as an existing position currently in your org. structure. Note: the position numbers for each position will be different.

4. Click in the **Create from Job** field .



Number of Positions (you want to create)- Though defaulting to "1", you can change this value to indicate the number of positions you want to create. If you create more than "1" position the system will assign each position a unique position ID number

5. As required, complete/review the following fields:

| Field | R/O/C | Description |
|-------|-------|-------------|
|-------|-------|-------------|

| Field | R/O/C | Description |
|-----------------|----------|-----------------------------|
| Create from Job | Required | Example: 20001554 |

6. Click the **Select Job** button .



No matter if you found the specific job or position code or choose to enter a code, you must always select the button to the right. This action confirms your selection and actually displays the title on the screen, next to the button.

Department Input

7. Click the **Continue** button .



Comments are optional. They have a character limit of roughly 150 (which includes spaces). Be concise and limit your comments to important information that will help the approvers understand the key elements of the position. Comments are seen only by those in Workflow approval groups (Comp, OM, Budget, Level 1 and/or Level 2 approvers).

Department Input

8. As required, complete/review the following fields:

| Field | R/O/C | Description |
|-------|-------|-------------|
|-------|-------|-------------|

| Field | R/O/C | Description |
|-----------------|----------|-------------------------------|
| Effective Date: | Required | Example: 02/29/2012 |



Effective Date: This will be the date the position will appear within your org structure. Given most positions are created because there is a need to hire, the Effective Date often is entered as today's date.

9. As required, complete/review the following fields:

| Field | R/O/C | Description |
|---------------------|----------|--|
| Organizational Unit | Required | An object used to depict the basic structure of an organization. Organizational units are functional units of a company. Depending on how tasks are distributed at a company, organizational units can be departments, groups or project teams. Organizational units are different from other entities at a company such as personnel areas, company codes, and business areas. These are used to depict administrative or accounting structures in the corresponding components. Example: 18000214 |



If you **Create from Job** you will need to enter an Org. Unit. This field will pre-populate if you used **Copy from Position**.

10. Click the **Select OrgUnit** button .

11. As required, complete/review the following fields:

| Field | R/O/C | Description |
|--|----------|--|
| Position Long Name (Business Card Title): | Required | Example: Sr. Program Coordinator |



Use this field to write the name of the position as it might appear on a business card

Department Input

12. Click the **Mark this Position open for Hire and Post to HR Recruitment Website** radio button



1. No/Remove recruitment or hire selection: Selecting this option means - "While I am creating a position, I have no immediate plans to hire an employee into it. I am being proactive, as I know I have additional headcount and will eventually need to hire an employee into this position" or "I want to remove this position from the BU recruitment website."

2. Mark this Position open for Hire: Selecting this option means This option should not be selected for Staff Exempt/Non-Exempt positions

3. Mark this Position open for Hire and Post to HR Recruitment Website: Selecting this option indicates that you want the position posted through Human Resources to the BU HR Recruitment website.
This option also means you want to get an employee hired into it (also through HR, who will enter the new staff hire into SAP for you).

13. As required, complete/review the following fields:

| Field | R/O/C | Description |
|---------------------------|----------|-------------------------------|
| Earliest Hire Action Date | Required | Example: 02/29/2012 |



When "Mark this Position open for Hire" is selected, a date field automatically appears, labeled "Earliest Hire Action Date". This is the earliest estimated date you expect to hire someone into it.



Select the **Position overlaps an existing position** check box only in a case of "overlap:- when the position being created is for the person replacing an employee who has not yet vacated their position.

Department Input

14. As required, complete/review the following fields:

| Field | R/O/C | Description |
|----------------------|----------|--|
| Weekly Workschedule: | Required | Example: M-F, 8:30-5, 40hrs per week |



Weekly Workschedule: Enter the days, work schedule, duration.

15. Click in the **Assignment Duration:** field

16. Select **12 Month - 52 Weeks**

Department Input

17. As required, complete/review the following fields:

| Field | R/O/C | Description |
|-----------------------|----------|------------------------|
| Employment Percentage | Required | Example: 100 |

| Field | R/O/C | Description |
|---|----------|--------------------------|
| Recruitment/Department proposed Amount: | Required | Example: 60.00 |

Department Input

18. Click the **Continue** button .

Department Input

19. As required, complete/review the following fields:

| Field | R/O/C | Description |
|-------------|----------|---|
| Cost Center | Required | An organizational unit or activity within a controlling area that represents a clearly delimited location where revenue and costs occur. Organizational divisions can be based on functional requirements, allocation criteria, physical location and/or responsibility for costs. Example: 1200400000 |



One line item per Cost Distribution source. The total Cost must equal 100%

20. As required, complete/review the following fields:

| Field | R/O/C | Description |
|------------|----------|---|
| Percentage | Required | The percentage used to distribute to the selected account. Example: 100.00 |

Department Input

21. Click the **Continue** button .

Department Input

22. As required, complete/review the following fields:

| Field | R/O/C | Description |
|----------------------------|----------|--|
| General Description Blurb: | Required | Example: Responsible for overall administration of the main department office, including answering telephones and representing the department to all callers and visitors. |



Enter a description that describes the overall tasks and responsibilities of the position you are creating.

Department Input

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General Description Buro: ...
Responsible for overall administration of the main department office, including answering telephones and representing the department to all callers and visitors.

Attachments

File Name

Select File: Browse...

Attach File Delete File Clear/Reset

Comments:

Back Continue Next Department Exit

23. Click the **Continue** button .

Department Input

1 2 3 4 5 6 7 8

Action Type Position Details Cost Distribution Descriptions **Essential Functions** Requirements Additional Data Overview

List up to six essential functions of the position in the space provided. Please include the approximate percentage of time spent on each function (percent of time must be 5% or more). Total percent time spent on essential functions must equal 100%.

Job Essential Functions Position Essential Functions

Essential Function 1:

Essential Function 2:

Essential Function 3:

Essential Function 4:

Essential Function 5:

Essential Function 6:

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24. As required, complete/review the following fields:

| Field | R/O/C | Description |
|------------------------------|----------|--|
| Position Essential Functions | Required | Example: Answer Phones 25% |
| Position Essential Functions | Required | Example: Office Administration 75% |



Essential Functions-List up to six essential functions of the position in the text areas provided. Please include the appropriate percentage of time spent on each function (percent of time must be 5% or more) at the end of the text. The total percent time spent on essential functions must equal 100.

Department Input

The screenshot shows the 'Department Input' form. At the top is the 'Attachments' section with a 'File Name' table, a 'Select File' field with a 'Browse...' button, and buttons for 'Attach File', 'Delete File', and 'Clear/Reset'. Below this is a 'Comments' text area. At the bottom, a navigation bar contains buttons: 'Back', 'Continue' (highlighted with a blue line and the number 25), 'Next Department', and 'Exit'.

25. Click the **Continue** button .

Department Input

The screenshot shows the 'Department Input' form with a progress bar at the top indicating steps 1 through 8. Step 6, 'Requirements', is currently active. Below the progress bar is the 'Position Requirements' section, which contains a table with columns for 'Qualification Catalog', 'Qualification', and 'Proficiency'. A blue line points to the 'Qualification Catalog' dropdown menu in the first row of the table, with the number 26 next to it. Below this table is the 'Attachments' section, which is identical to the one in the previous screenshot.

26. Click in the **Qualification Catalog** field .



Highlight and select the appropriate value from the Qualification Catalog, Qualifications, and Proficiency field drop-downs relative to the position.

Department Input

This screenshot is identical to the first one, showing the 'Department Input' form with the 'Attachments' section and the navigation bar at the bottom. A blue line points to the 'Continue' button, with the number 27 next to it.

27. Click the **Continue** button .

Department Input

28. Click in the **Building:** field .



Select the appropriate **Buiding** location from the drop down selection.

29. Click in the **MailCode:** field .



Select the appropriate **Mailcode** from the drop down selection.

30. As required, complete/review the following fields:

| Field | R/O/C | Description |
|------------------------|----------|---------------------------------|
| Office Phone: | Required | Example: 617-353-4466 |
| Hiring Manager Number: | Required | Example: 1 |

Department Input

31. Click the **Get Hiring Manager Info** button **Get Hiring Manager Info**.



Hiring Manager Lookup – Click the icon to locate the hiring manager's name from the list. Then click on the name and this will auto-populate the Hiring Manager's Name, along with the Email and Phone fields.

32. Click in the **Recruiting Department:** field .



Recruiting Department - Via the drop-down menu, you can select a different Recruiting Department. This value is linked to the Org Unit initially selected for this position currently being maintained.



Planned Work Schedule Info- This area is where you can modify any of the following fields, as needed, to accurately reflect changes to the position in the posting. NOTE: This is NOT the "Work Schedule Rule".

Assignment Duration - This pre-populates, based upon data that appeared on the Position Details tab.

Weekly Work Schedule - This pre-populates, based upon data that appeared on the Position Details tab.

33. Select **CARS Department** .

Department Input

The screenshot shows a form with several sections:

- Recruiting Department Information:**
 - Hiring Manager Lookup: * 00000001
 - Email: Nathan Bower
 - Phone: Nathan.Bower@scrambled.edu
 - Recruiting Department: *
- Planned Workschedule Info:**
 - Assignment Duration: * 12 Month - 52 Weeks
 - Weekly Workschedule: * M-F, 8:30-5, 40HRS PER WEEK
 - Weekly Workhours: 0.00
 - Employment Percent: * 100
- Additional Info:**
 - New/Existing Position: *
 - Grant Funded: *
 - Replacing Whom:
- Recruitment Posting Information:**
 - Posting Description for HR Website:
 - Posting Requirements for HR Website:
 - Recruitment Comments:

Annotations on the left side of the screenshot:

- 37 points to the Employment Percent field.
- 36 points to the Additional Info section header.
- 34 points to the New/Existing Position field.
- 35 points to the Grant Funded field.

34. Click in the **New/Existing** field .



New/Existing Position - Given we are completing a Create Position form, you would select New Position.

35. Select **New Position** .

36. Click in the **Grant Funded:** field .



Grant Funded – You can change to No, Yes, or Partially. Note: This information is solely to help the Recruitment team and for posting purposes on the HR Recruitment website. It DOES NOT impact/drive actual funding of the position.

37. Select **No** .

Department Input

38. As required, complete/review the following fields:

| Field | R/O/C | Description |
|------------------------------------|----------|--|
| Posting Description for HR website | Required | Example: Responsible for overall administration of the main department office, including answering telephones and representing the department to all callers and visitors. Organize and maintain student files and course materials including syllabi. Copy exams and type |



Posting Description for HR Website- This area is for a 5-8 sentence description providing the primary function/purpose of the position. Note: It will be viewable by potential applicants.

39. As required, complete/review the following fields:

| Field | R/O/C | Description |
|-------------------------------------|----------|--|
| Posting Requirements for HR website | Required | Example: Bachelors degree in Education or Communication. One to three years of related office experience preferably within Higher Education. |



Posting Requirements for HR Website- This area is for a description of the requirements and qualifications needed to perform the position. Note: It will be viewable by potential applicants.

40. As required, complete/review the following fields:

| Field | R/O/C | Description |
|-----------------------|----------|--|
| Recruitment Comments: | Required | Example: Need someone who can multi-task and works well with people. |




This text area is to communicate directly with HR/Recruitment. It is NOT part of the posting.

Department Input

41. Click the **Continue** button .

Department Input

42. Click the **Next Department** button  to start the workflow approval process.

Create Position - DPO - Windows Internet Explorer

BUworks Central

Home Employee Self-Service Manager Self-Service Worklist WebGUI

Team Organization Overview

Create Position

Attachments

File Name

Select File: Browse

Comments:

The 'Position Request' was routed to the HR/COMP department.

43. Click the **Team** tab **Team** to view your **Request Tracker**.

Tracking version 3

BUworks Central

Home Employee Self-Service Manager Self-Service Worklist WebGUI

Team Organization Overview

Services

Employee Information

Employee Working Times

Hiring Forms

Personnel Actions

Request Tracking

Tracking # From To Request Type Search

| Tracking Number | Initiator | Request Type | Affected Person/Object | Request Date | Status | Current Agent | Last Action Date | Date Completed |
|-----------------|-------------|----------------------------|------------------------------------|--------------|-----------|-----------------|------------------|----------------|
| 600017972 | James Dukes | Create Position | New Position, Name TBD | 02/29/2012 | Submitted | Workflow | 02/29/2012 | |
| 600017971 | James Dukes | New Hire - Staff | SERIOUSLY WORK | 02/29/2012 | Submitted | Budget Office | 02/29/2012 | |
| 600017970 | James Dukes | New Hire - Staff Temporary | CHANDRA FLYNN | 02/29/2012 | Returned | James Dukes | 02/29/2012 | |
| 600017969 | James Dukes | New Hire - Staff Temporary | SCOOTER SULLIVAN | 02/29/2012 | Submitted | Workflow | 02/29/2012 | |
| 600017968 | James Dukes | Maintain Position | 18000117 -ADMINISTRATOR, FINANCIAL | 02/28/2012 | Rejected | | 02/29/2012 | |
| 600017966 | James Dukes | Termination | Cecile Hahn | 02/27/2012 | Submitted | Human Resources | 02/27/2012 | |
| 600017963 | James Dukes | Create Position | New Position, Name TBD | 02/24/2012 | Rejected | | 02/29/2012 | |
| 600017955 | James Dukes | Create Position | New Position, Name TBD | 02/23/2012 | Submitted | Compensation | 02/23/2012 | |
| 600017927 | James Dukes | Create Position | New Position, Name TBD | 02/21/2012 | Submitted | Compensation | 02/21/2012 | |
| 600017924 | James Dukes | New Hire - Staff Temporary | ANTHONY CAPUTO | 02/21/2012 | Returned | James Dukes | 02/29/2012 | |

44. Click the **Select** button ☐ next to the request you would like to review.

45. The transaction is complete.



Results and Next Steps

You have created a Staff Exempt/Non-Exempt position, marked the position open for hire and prepared a posting to the HR Recruitment website .