About This Guide

Complete an Organizational Management (OM) Create Position form when you want to create a position which doesn't currently exist within your organizational (org) structure.

Notes

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

A. Create from Job

Create from Job allows for a position to be created using a job code. One, 20001554 (*To be determined*) allows the Compensation team to assign the correct job code when they see the Create Position form via their Workflow approval.

B. Copy from Position

Copy from Position - Use this option when the new position will be the same as an existing position currently within your org structure.

Notes:

- Copy from position will produce a new position with a different position number from the one it was copied from. Each position in SAP has a unique position number
- An org unit can have only 1 manager assigned to it
- If there is already a manager assigned to the org unit your manager-level position will be in, you must first complete an OM ***Org Unit Request*** form
- Once the Org Unit Request form has been approved, you can proceed with completion of a *Create Position* form

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Prior to Creating a Position

- **Contact Central HR to work with them on details for the position you want created**
- Keep in mind Workflow and timing of your Create Position form submission. Actions on the Personnel Administration (PA) side often require an OM position form first be approved. Avoid waiting until the last minute to complete a **Create** (or **Maintain**) **Position** form
- **Check your Org Structure** to determine if a similar position to the one you want to create already exists. If this is the case, obtain the Org Unit ID and Position ID (helpful when using Copy from Position). Refer to the segment below for instructions on looking up a position

Looking up a Position within Your Org Structure

1. From the **BUworks Central portal**, click the **Manager Self-Service** or **Payroll Coordinator** tab.
2. Click the sub-tab of Organization.
3. Click the Organizational Overview • Organizational Profile link to obtain the ID of the org unit.
4. From the **Org Unit Selection** dropdown, select **Organizational Structure.**
5. Select the appropriate org structure and sub-unit from the list that the position will fall under. For example:

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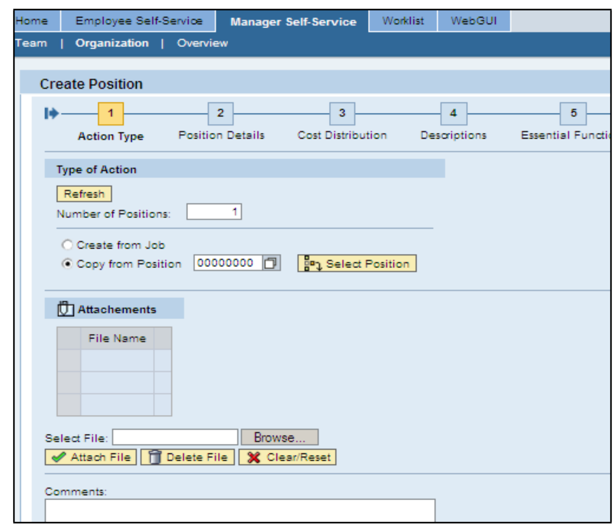
Looking up a Position in Your Org Structure (cont.)

6. Refer to **Account Assignment Features** to review and mark down existing, active positions for the Org Unit you selected, including the **Position ID** and **Holder** (i.e. employee) of the position. This will help should you opt to use **Copy from Position** later.
7. Click the **Close** button to exit. **You are now ready to create the position.**

Accessing the Create Position Form

1. From the **BUworks Central portal**, click your **Manager Self-Service** or **Payroll Coordinator** tab.
2. Click the sub-tab of Organization.
3. From **Organizational Management Actions,** click the link labeled Create Position. The screen refreshes and the **Create Position** form appears, shown below:

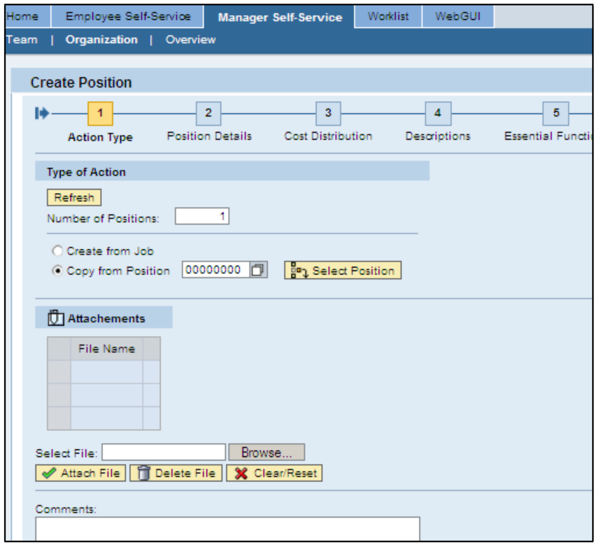


You have successfully accessed the Create Position form and are now ready to start completing it:

(Proceed to the next page)

Completing the Create Position Form

There are seven main tabs on the Create Position form.

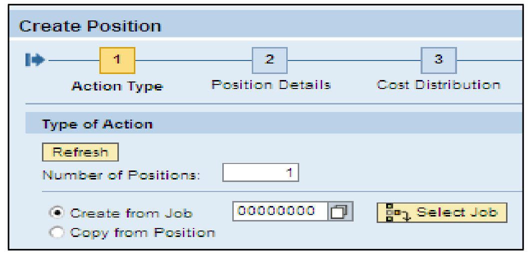


1. **Number of Positions** (*you want to create*) **–** Though defaulting to "1", you can change this value to indicate the number of (exact same) positions you want to create.

   Notes:

   - Increasing the Number of Positions from 1 to a greater number is common when creating multiple (typically temporary) positions
   - If you're using separate budget lines, leave the Number of Positions at "1", as these positions will need to be separately created positions (i.e. requiring completion of *separate* **Create Position** forms)
   - Remember, there is a 1:1 relationship between a position and an employee assigned to it - though an employee can hold more than one position

Create from Job vs. Copy from Position



2. As stated on page 1, when completing a Create Position form, you have two options: ***Create from Job*** or ***Copy from Position***. Let's look closer at each, starting with Create from Job.

Using "Create from Job"

This option should be used if you know the specific job code that is associated with the position you wish to create.

Clicking [Create from Job] allows you to search across list of **all** BU job codes for the specific job code you want, using the match code icon. **Tip**: In the **Create from Job** text box, you can enter one these commonly-used, generic Job Codes

- **For a Temporary** position, please choose from the temporary job code family listed in the job search function
- **For a Non-Compensated Faculty** position you're creating, enter **20001552**
- **For a Non-Compensated Staff** position you're creating, enter **20001553**
- **If you are not sure which job code to use**, enter **20001554**, for *To Be Determined* (TBD).

Note: Compensation will assign the correct job code when they see the Create Position form via Workflow approval.

Next - You MUST CLICK the [Select Job] **button!**

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Create from Job vs. Copy from Position (continued)

No matter if you've found the specific job code you want or chose to enter *20001551, 20001552, 20001553*, or *20001554* **you must always select the** [Select Job] **button**.

Doing so confirms your selection and actually displays it on the screen, next to the [Select Job] button. Using the *20001554 - TBD* example, the screen would display as follows:

Using "Copy from Position"

The other option for getting a position created is using Copy from Position. Copy from Position should be used when you want to create a new position from one which already exists within your Org Structure. The new position will inherit all of the attributes of the position it's copied from. It will, however, have its own unique position number.

Note: Although "copying," you are permitted to make edits as you go along, given the "new" position will likely require at least minor updating.

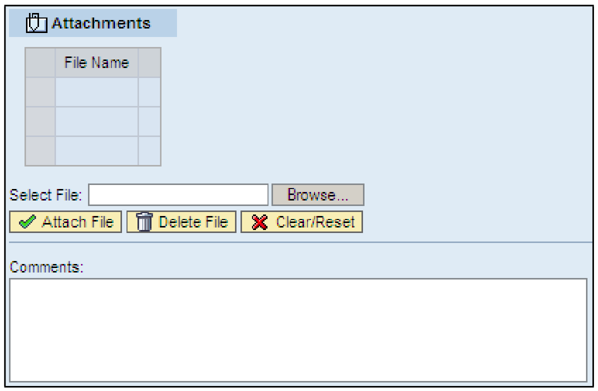
As with Create from Job option, you can search for a position by clicking the match code icon and choose an option from the list. **Note**: the search is conducted against ONLY positions within your Org Structure, as opposed to all of BU, as with the Job Code search).

(Proceed to the next page)

Attachments

At this point, you've opted to either Create from Job or Copy from Position (Note: in our example, we've opted to use **Copy from Position**).

We're now looking at the remaining half of the **Action Type** tab of the Create Position form, shown below:



3. **"Attachments"**

Uploading attachments is **optional**. It is intended for adding attachments containing information specific to the position ONLY. For example, for a *Lab Technician* position, the attachment might contain an expanded list of chemicals the employee will be working with.

Notes:

- The Create Position form being completed will ultimately pass through Workflow for official approval (Comp, Budget, Dept. Level 1 and/or Level 2 approvers) Therefore, you need NOT attach any "offline approval" documents as a means of getting a position past Workflow approval.

(Continued in the next column)

Attachments (continued) and Comments

"Attachments" (continued)

- NEVER attach documents containing sensitive, employee-specific information
- Attached documents will live on the Position after it's created (not the employee record). They can be viewed via the Maintain Position form. Attachments do not appear in the back-end/SAP
- Information contained within an attachment is not extracted or validated; therefore it will not be searchable nor reportable (i.e. accessible via reporting) in SAP

To upload an attachment:

A. Click Browse... to locate the file on your computer.

B. Select the file from your local drive. It will then appear on the Create Position form (by name) in the textbox.

C. Click Attach File.

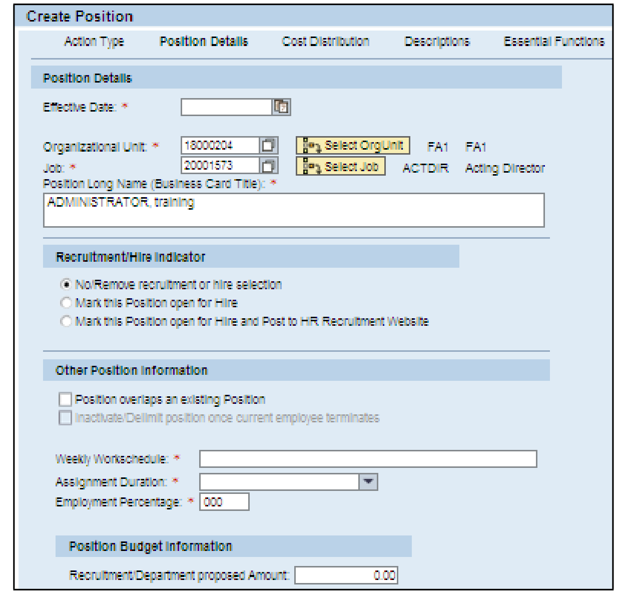
4. **"Comments"**

Notes:

- Comments are MANDATORY. They have a character limit of roughly 150 (which includes spaces), so be concise in what you enter.
- Comments are not seen by the HR Recruitment team, only the Workflow approval groups (Budget, Comp, Dept. Level 1 and/or Level 2 approvers).
- There is a specific field which will be seen later on the *Additional Data* tab called *Recruitment Comments* which can be used to enter comments intended specifically for communicating with the HR Recruitment team.

The "Position Details" Tab

5. Click Continue. The **Position Details** tab appears:



6. **Effective Date –** The earliest date the position can exist as an object in SAP & display within your org structure (remember- the form needs to go through approvals, which could delay the position appearing in your org structure). **Tip**: Given most positions are created because there is an "immediate" need to hire, the Effective Date often is entered as today's (i.e. the current) date.

7. **Organizational Unit** – This field will pre-populate if you used *Copy from Position*. **Note**: It will need to be searched for and entered if you used *Create from Job*.

Tip: make sure to click the Select OrgUnit button after you enter your Organizational Unit.

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The "Position Details" Tab (continued)

8. **Job** appears, based upon use of ◯ Create from Job or Copy from Position.

9. **Position Long Name (Business Card Title)** – Use this field **only** to enter the name of the position as it might appear on a business card. For example:

Position Long Name (Business Card Title): *
Web Designer

"Recruitment/Hire Indicator"

Recruitment/Hire Indicator

◉ No/Remove recruitment or hire selection
◯ Mark this Position open for Hire
◯ Mark this Position open for Hire and Post to HR Recruitment Website

10. The **Recruitment/Hire Indicator** area of the Create Position form is where you indicate if (and when) you want to initiate the recruitment process to get the position filled AND if you want your position to be posted to the BU HR Recruitment Website or not.

"No/Remove recruitment or hire selection"

◯ No/Remove recruitment or hire selection

This option is used for:

- **Positions that you want to create, but do not want to post, nor hire for yet** - "*While I am proactively creating this position, I have no immediate plans to hire an employee into it. I am being proactive, as I know I will eventually need to hire an employee into this position. Once the Create Position form has been approved, the position will appear in my Org Structure based upon the Effective Date I indicated at the top of the form.*

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"Recruitment/Hire Indicator "(continued)

(continued from previous column)

*The 'door' to the position getting filled remains shut, again - as I have no **immediate** plans to hire an employee into it."*

"Mark this Position open for Hire"

◯ Mark this Position open for Hire

This option is used for:

- **Opening a position for hire that is NOT posted through Human Resources so that an employee can be hired into it. Such non-posted positions include: Faculty, Temporary and Non-Compensated Positions, Academic Research, etc. -** "*I want the door to this position to be opened, so that it appears on the Hire form as a vacant and available-for-hire position, allowing me to proceed with getting an employee hired into it. I do NOTwant this position posted.*"

- **(On the *Maintain Position* form) A position which currently exists within your Org Structure that you want to hire an employee into -** "I created this position earlier, but wasn't ready to begin hiring for it. I am now ready to do so, and have therefore selected this option. I do not want this position posted ."

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"Mark this Position open for Hire" (continued)

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Notes:

- When "Mark this Position open for Hire" is selected, a date field automatically appears, labeled "**Earliest Hire Action Date**" Earliest Hire Action Date: * . This is the earliest estimated date you expect to hire someone into it.
- There is a check in place, ensuring the "Earliest Hire Action Date" cannot be set earlier than the "Effective Date" entered earlier, at the top of the Create Position form

"Mark this Position open for Hire and Post to HR Recruitment Website"

◯ Mark this Position open for Hire and Post to HR Recruitment Website

This option is used for:

- **STAFF positions that get posted to the BU Recruitment website (through HR) and get an employee hired into it (also through HR, who enter the new hire)** -"*I am requesting HR Recruitment begin the recruitment process for filling this position. This starts with a Recruiter posting it to the BU Recruitment website. I have indicated the ideal date that I'd like the position posted in the* Posting Date: * *field. In working with Recruitment, I am 'opening the door' to this position so as to allow Recruitment to eventually hire a Staff employee into it for me."*

Note: Once the position completes Workflow and has all of its approvals, an Recruiter will contact you to discuss the recruiting and posting process.

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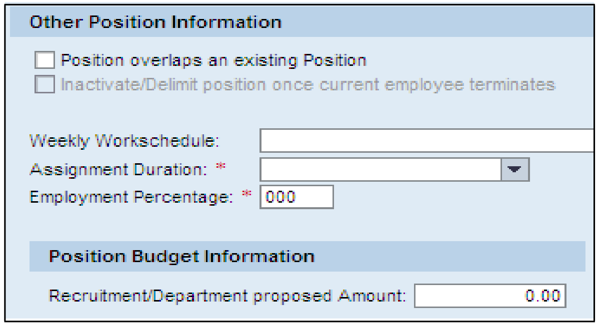
Quick Reference Guide - Org Management
Completing a Create Position Form (page 5 of 7)

BU Employee Learning Solutions

"Other Position Information"



[ ] Position overlaps an existing Position Select this check box only in a case of "**overlap**"- when the position being created is for the person replacing an employee who will not have yet vacated their position when their replacement starts work. Later, after the position you have created has been approved and once the employee *has* vacated their position/left BU:

A. Complete a **Termination** form on the departing employee.

B. Complete an OM **Maintain Position** form. Choose ( ) Mark this Position open for Hire. This flags the position as available for hire (but will not post it) and ensures it will appear on the **New Hire** and **Position Change** forms.

C. Complete a Personnel Administration ***Position Change*** form to move the *replacement* employee from their temporarily-created position into the now-vacated position.

D. Lastly, delimit the "temporary" position that was initially created for the replacement employee, via completion of the OM **Delimit Position** form.

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"Other Position Information" (continued)

11. **Weekly Work schedule** – (**Note**: This is NOT the "Work schedule rule". This field is to aid Recruitment in terms of the position posting to the BU Recruitment website). In the text box, enter the days, work schedule, and average # hours per week (i.e. *Mon-Fri, 8:30am-5pm, 40 hours*). If the employee will be on a "non-standard" schedule (i.e. *not* Monday-Friday), provide a brief explanation. Your entry will feed to the *Additional Data* tab. If you need more text for your explanation, use the "Recruitment Comments" text area on the "Additional Data" tab.

12. **Assignment Duration –** Via the dropdown menu, select the appropriate assignment duration. This feeds to the *Additional Data* tab.

13. **Employment Percentage -** Ranges between100 to 0 (whole numbers). This feeds to the *Additional Data* tab.

14. **Recruitment/Department proposed Amount –** Enter what you propose to pay the employee (The amount entered may not end up being the actual salary. This is determined by Compensation, whom you should contact with questions). For **exempt and non-exempt positions**, enter the **proposed annual salary** (e.g. 65000.00). For temporary, enter the **proposed hourly pay** (e.g. *15.00*). **Note**: The amount entered will not be higher than the approved grade for this position.

15. Click [Continue].

The "Cost Distribution" Tab

16. Enter **Cost Distributions**
    Tip: If you use up all three lines, add lines as needed by clicking the [Add Blank Cost Distribution Line] button.

17. Click [Continue].

The "Descriptions" Tab

18. Enter a **General Description Blurb** for the position, as needed.

19. Click [Continue].

The "Essential Functions" Tab

20. **Essential Functions –** To expedite approval of this position and as best practice, enter/update up to 6 essential functions of the position. **Note**: For all **Staff positions** getting posted and temporary **that you want to pay monthly** – you MUST enter a percentage at the end of the text (as shown below).
    Entering percentages is recommended (but not required) for **Faculty, Non-Comp, Academic Research, and Temporary that are paid weekly**

    with the Office of General Accounting to resolve transaction related issues; processing cost transfers; supervising data entry,bank deposits, and other daily tasks in support of finance operations. (25%)

Notes:

- The percent of time entered must be 5% or more for each essential function
- The total percent time spent on essential functions must total to 100%

21. Click [Continue].

The "Requirements" Tab

22. **Requirements –** (optional) Highlight and select the appropriate value from the **Qualification Catalog, Qualifications**, and **Proficiency** field drop-downs relative to this position.

23. **Click** [Continue].

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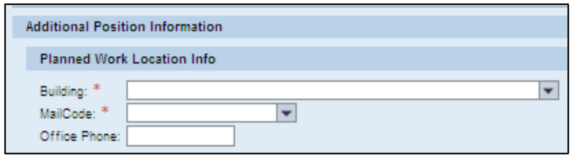
The "Additional Data" Tab

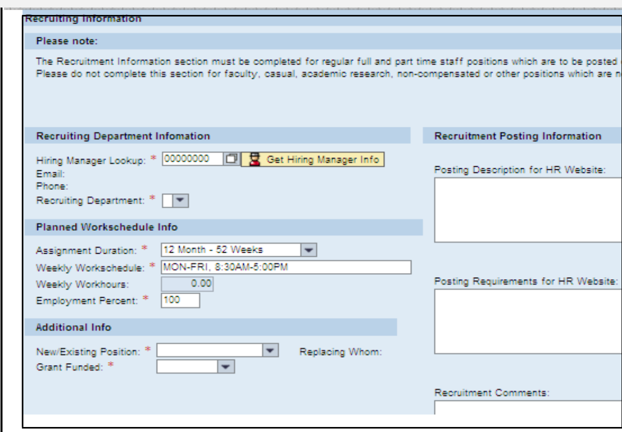
Having completed the Requirements tab, we're now at the Additional Data tab, where we'll start completing the **Additional Posting Information** section:



24. **Building** – Select the building the position is based and/or where the employee will work.
25. **Mail Code** - Select the appropriate mail code.
26. **Office Phone** - Enter the employee's number, if known. If not known, enter the general building phone

PLEASE NOTE! If the position you're creating is for faculty,temporary,academic research,non-compensated or other positions which are not hired or posted through Human Resources, scroll to the bottom of the form, Click Continue > Click Next Department to submit the form. Click Exit to close the window.

"Recruiting Information"



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"Recruiting Information" (continued)

<u>The "Recruiting Information" section within this tab must be completed ONLY for Staff positions which are to be posted on the BU Human Resources Jobs website</u>. Do NOT complete this section for faculty, temporary, academic research, non-compensated or other positions which are NOTot hired or posted through Human Resources.

If, on the "Position Details" tab, you did not select the "Recruitment/Hire indicator" of

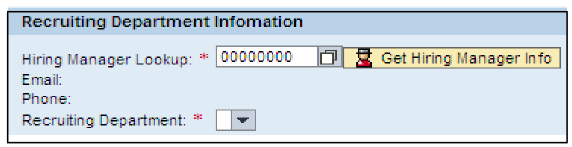
Mark this Position open for Hire and Post to HR Recruitment Website

the Recruiting Information section will not be available for completion.

"Recruiting Information" is broken into 4 sections:

- **Recruiting Department Information**
- **Planned Work Schedule Info**
- **Additional Info**
- **Recruitment Posting Information**

"Recruiting Department Information"

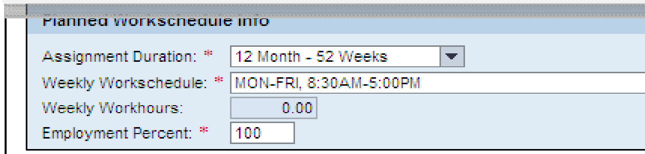


27. **Hiring Manager Lookup** – Click the icon to locate the hiring manager name from the department needs the position filled. Note that search is case sensitive.
28. Click Get Hiring Manager Info. This will auto-populate the **Hiring Manager's Name**, along with the **Email** and **Phone** field. If you do not find the name, contact HRIS by emailing (HROM@bu.edu).

"Recruiting Department Information" (cont.)

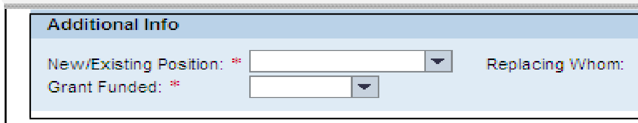
29. **Recruiting Department** - Via the drop-down menu, select the (only option that appears for the) Recruiting Department. This value is linked to the Org Unit initially selected for this position currently being created.

"Planned Work Schedule Info"



30. **Assignment Duration** - This pre-populates, based upon data entered on the Position Details tab.
31. **Weekly Work Schedule** - This pre-populates, based upon data entered on the Position Details tab.
32. **Weekly Work Hours** - (Skip, as this field is grayed out). Note: This field is entered later, by Compensation.
33. **Employment Percent** - This pre-populates, based upon data entered on the Position Details tab.

"Additional Info"



34. **New/Existing Position** - Given we are completing a Create Position form, select ***New Position***.
35. **Grant Funded** – Select *No, Yes,* or *Partially.Note:* This information is soley to help the Recruitment team. **Note: Your selection DOES NOT impact/drive actual funding of the position.**

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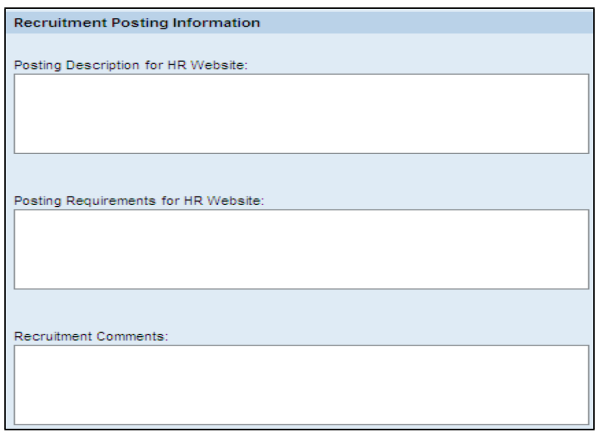
Additional Data Tab- Recruitment Posting Info

Do not use this page of the guide for faculty, temporary, academic research, non-compensated or other positions which are not hired or posted through Human Resources

We're now at the **Recruitment Posting Information** section of the Additional Data tab, where we'll provide some information to the HR/Recruitment team on the position we're creating and want them to post and get filled. The section is broken into 3 text areas:

- **Posting Description for HR Website**
- **Posting Requirements for HR Website**
- **Recruitment Comments**


Recruitment Posting Information

Posting Description for HR Website:

Posting Requirements for HR Website:

Recruitment Comments:

Reminders:

- The **Recruitment Posting Information** section must be completed ONLY for positions which are to be posted on the BU Human Resources Jobs website
- **Reminder: Do NOT complete the Recruitment Posting Information section for faculty, temporary, academic research, non-compensated or other positions which are not hired or posted through HR**

Additional Data Tab- Recruitment Posting Info

34. **Posting Description for HR Website**

This is a 5-8 sentence description providing the primary function/purpose of the position. **Note**: It will be viewable by potential applicants.

Format:

- The 1st sentence is a general opening summary statement about the position
- Use present tense
- Each statement should start with an action word that is linked to a value, product, outcome, service or objective
- There should be an emphasis on connecting the position to the mission of the department

Tip: Refer to the following tabs on the Position forms:

- Descriptions tab: The Position's "*General Description Blurb*" provides a good starting point for the description
- Essential Functions tab: Provides the main position functions to highlight in the description

35. **Posting Requirements for HR Website**

This is a description of the requirements and qualifications needed to perform the position. **Note**: It will be viewable by potential applicants.

Format:

- **1st requirement** is the educational requirements (use abbreviation of *B.A.* or *B.S.* for *Bachelor's degree* and include the specific area of study if necessary i.e. *B.A. in Biology or Chemistry*)
- **2nd requirement** is years of work experience (include specific type of experience if necessary (i.e. *one to three years of related administrative experience working in an academic environment.)*

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Additional Data Tab- Recruitment Posting Info

- **Remaining requirements** then follow (i.e. *excellent communications skills and customer service skills, strong analytical and problem solving skills, experience developing front-end/server side applications using HTML, JavaScript, AJAX, and CSS, experience with content management systems*)

Tips:

- Info within the "Position Requirements" tab of the Position should be consistent with info in the "Posting Requirements for HR website" text area
- If a skill/experience is "preferred" or "desirable," designate it as such
- Include any additional, specific information related to the position that a candidate should know about (i.e. *this position requires frequent travel, this is a live-on position. this position requires weekend and evening hours during peak periods,* etc.)

36. **Recruitment Comments**

This text area is intended for communicating directly with HR/Recruitment. These comments aren't part of the posting.

41. Click Continue. Review each tab and the data entered. **Tip**: To change any info, click Back to return to the previous steps *or* click on the appropriate tab number at the top of the screen.

42. Click Next Department to submit request for approval via Workflow.

43. Click Exit to close the window. **You've completed the Create Position form! Track approval via Request Tracker. Remember – for Staff positions, a recruiter will contact you once the form completes Workflow to discuss the position and posting of it.**