



a place of mind

THE UNIVERSITY OF BRITISH COLUMBIA

# Position Management

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## User Guide for Faculty

*UBC Human Resources - HR Management Systems*

**3/23/2015**

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**1**

**Accessing the Position  
Management/Recruitment  
Portal**

## 1.1 The CWL Portal

A portal page for Position Management and eRecruit has been developed to ease system navigation. To access this page, log in to CWL ([www.msp.ubc.ca](http://www.msp.ubc.ca)).

**Management Systems Portal** Home [Sign out](#)

**Employee Login**

CWL User ID:

CWL Password:

[Sign In](#)

[Forgot your CWL password](#)

What is CWL? [Find out here](#)

Don't have a CWL account? [Create one now](#)

**Welcome Message**

Welcome to your new Management Systems Portal.

For new and existing faculty and staff, find information and resources to help with HR and financial tasks from seeing your T4 slip to getting paid.

**Off-Campus Access**

UBC Virtual Private Network (VPN) is required for users accessing this system from off-campus or from the UBC Wireless Network. You must be logged into VPN prior to signing on.

Don't have VPN? [Go here to download it](#)

**Signon To...**

- See my T4
- Apply for a job
- Change my preferred name(s)
- Submit expense claims
- Create or update a vendor
- Review my pay
- Review my benefits
- Access FMS (authorized users)
- Access HRMS (authorized users)

**Quicklinks**

- [UBC Faculty and Staff](#)
- [UBC Careers](#)
- [UBC Directory](#)

**UBC**

**UBC News**

**Tweets** [Follow](#)

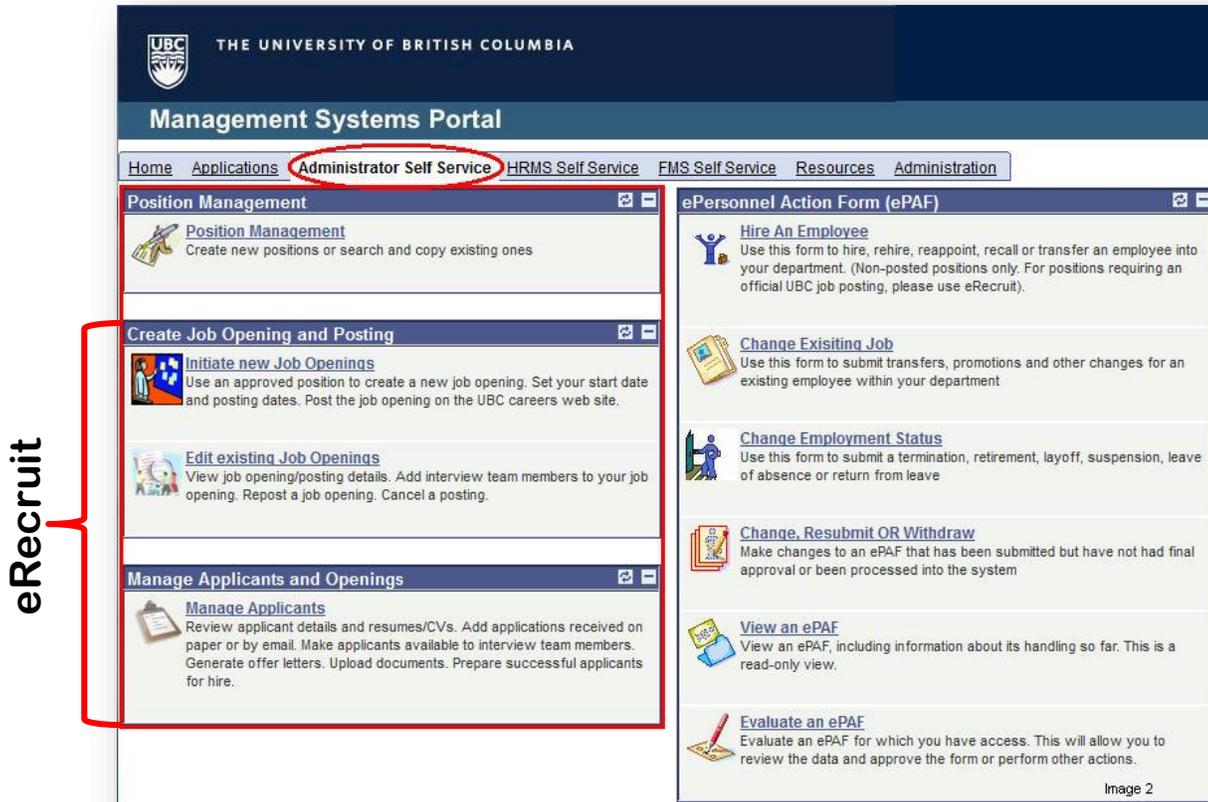
**UBC News** [@ubcnews](#) 26m

**UBC News** [@UBCFHSD](#) 1h

Image 1

## 1.2 The Management Systems Portal

Once logged into the **Management System Portal**, select the **Administrator Self-Service** tab to access the portal page (alternatively, you can click on the **HRMS Live** hyperlink from the **Home** tab, or the **HRMS Reporting** hyperlink from the **Applications** tab, if you wish to bypass the portal navigation page below).



Select **Position Management** from the **Administrator Self Service** portal page. Once in PeopleSoft you can choose to use the PeopleSoft Navigation Menu (below), or return to the Portal page to navigate to different areas within the recruitment process.

Position Management



eRecruit





**2**

# **Position Management**



## 2.1 Position Management Defined

### What is position management?

- Position Management is the starting point for creating a job opening/posting.
- Position management maintains both Human Resources and Budget information for every authorized Faculty and Staff position (positions are optional for student positions).
- Defines Human Resources by position, rather than by employee.
- Defines key attributes of a position such as position number, department, job code, business title, FTE and reporting relationships. Job descriptions and Faculty job ads can also be attached to the position, facilitating the recruitment process in eRecruit.
- Defines funding distribution of a position such as funding effective dates and associated speedchart, for both salary and benefit expenses.

### Why is it important? What are the advantages?

- Provides the ability to manage the University's workforce by position, in addition to employees occupying those positions.
- Streamlines processes for recruiting and hiring Faculty and Staff.
- Provides committed budget funding and salary expenses for both filled and vacant positions.
- Fully integrated with UBC's PeopleSoft HRMS and Oracle Hyperion budget system.
- Provides organizational reporting structure by position, which can then be linked to employees occupying those positions.
- Improved reporting and turnover analysis.

## 2.2 Create a New Position

Navigation: Position Management>Add/Update Position Info.

### 2.2.1 Find an existing position or add a new position

### Position Management

Complete all or some of the fields below and click on the 'Add/Search' button.  
Click on the magnifying glass to select from a list of valid values.  
The values selected here can be changed in the screens which follow, if necessary.

**Position Number:**  

**OR**

**Enter information in the following fields to locate the Position Number**

**Campus:**   Vancouver

**VP/Faculty:**   Faculty of Arts

**Department Code:**   History

**Employment Group:**   Faculty (Fac Assn)

**Job Family:**   Regular (RG)

**Job Code:**   Professor (tenure)

**Job Title Key Word Search:**

**Incumbent Name:**    
Enter Last Name, First Name (or initial)

**OR**

**My Positions**

- Click on the magnifying glass icon  for a list of valid values.
- Enter fields in order that they appear
- When creating a new position, fields entered here may be changed later in the position management pages

Search results page indicating that no existing positions exist which match your selection criteria.

**Note:** If a position is retrieved, review the position to see if it can be used before creating a new one.

[Add/Update/Copy Position](#)

No matching values found. Click on the 'Add New Position' button to create a new Position.

[Add New Position](#) [Back to Search Page](#)

Click on [Add New Position](#) to proceed.

## 2.2.2 Enter Position Information

Position Information | Job Description/Ad | Approvals | Budget | Incumbents | Attach Documents | Joint Position

Position Management

Position Number: NEW Created By: Kathy Boudreau Created On: 01/30/2013

Position Information Find | View All First 1 of 1 Last

\* Event: 1. Add New Position \* Event Start Date: 01/30/2013 \* Sequence: 0

Data Entry Date: 01/30/2013 Last Updated By: Kathy Boudreau Will you be posting this position?

Status

Position Status: Active Overall Position Approval Status: Draft

Required fields are preceded by an asterisk \*

- **Event:** Select appropriate event.
- **Event Start Date:** Use the earliest date this position could be filled (field defaults to current date so remember to change it! (see page 2.4.3 for important information about this date field).
- **Sequence:** System defaults in this value for you; it's usually set to zero.
- **Data Entry Date:** Date that the event was data entered.
- **Last Updated By:** Shows the name of the person who created the position.
- **Will you be posting this position?:** Select only if you're planning to post your job in UBC's eRecruit system. This field will invoke approval workflow for some positions.

<b>Status</b>		
Position Status:	Active	Overall Position Approval Status: Draft
		Central Approval Status: Not Applicable
		Department Approval Status: Approval Required
Business Unit:		UBC01 UBC - Vancouver
<b>Type</b>		
Position Type:	Term Position	Non UBC Posn? <input type="checkbox"/> Pool Posn? <input type="checkbox"/> Unpaid Posn? <input type="checkbox"/>
Joint Position? <input type="checkbox"/>		Expansion Posn? <input type="checkbox"/> F-Slot: <input type="text"/>
<b>Term</b>		
Original Position	01/20/2012	Max FTE: 1 Max Head Count: 1

- **Position Status:** Active/Inactive.
- **Overall Position Approval Status:** Indicates the overall approval status of the position (e.g. faculty job ad).

Status	Description
Pending Approval	Pending both central and departmental approval
Draft	When user selects 'Save for Later'
OK for eRecruit and ePAF	All necessary approvals have been obtained; position can be used in ePAF and eRecruit
Pending Department Approval	Position is out for departmental approval
Pushback from Department	Departmental pushback
Pending Central Approval	Position is out for central approval
Pushback from Central	Central pushback
OK for ePAF only	Departmental approvals have been received and position can be used in ePAF. Department has not requested Central Approval (Staff Job Description or Faculty Job Ad either doesn't exist or if it does, approval hasn't been requested)
Saved without Approval	When users selects 'Save without Approvals'

- **Central Approval Status:** Indicates the approval status of the central approvers for the position.
- **Department Approval Status:** Indicates the approval status of the departmental approvers for the position.
- **Business Unit:** Indicates Vancouver/Okanagan campus.
- **Position Type:** Select appropriate values based on employment group and term of appointment.
- **Non UBC Posn?:** Select if position is not an official UBC position.
- **Pool Posn?:** Select if head count for position is greater than one.
- **Unpaid Posn?** Select if position is unpaid (i.e., honorary, clinical) or not paid through UBC's payroll.
- **Joint Position?:** Select if position will be jointly managed and paid by two distinct faculties or departments.
- **Expansion Posn?:** Select if the position is being created as a result of an expansion.
- **F-Slot:** Enter former F-Slot Budget code for reference purposes (Faculty positions only).

Term					
Original Position Start Date:	01/30/2013	Max. FTE:	1.00000	Max Head Count:	1
Anticipated Hire Date:	07/01/2013	Position End Date:	<input type="text"/>		
Work Location					
* Campus:	VCVR	Vancouver			
* VP/Faculty:	ARTF	Faculty of Arts			
* Department:	HIST	History			
Location:	BUT	Buchanan Tower			
Classification Information					
Employment Group:	BOG	Faculty (Fac Assn)			
Job Family:	RG	Regular			
		<input checked="" type="checkbox"/> Central Approval Required			
Job Code/ Classification Title:	BURG01	Professor (tenure)			
Salary Admin. Plan:	N/A	Grade:	N/A	Job Standard Code:	N/A
Business Title:	<input type="text" value="Professor (tenure)"/>				
Does the position require UBC to do a Criminal Record Check?	<input type="text"/>	<a href="#">More on criminal record check</a>			
Does the position require inclusion in the Occupational & Preventative Health program?	<input type="text"/>	<a href="#">More on OPH Program</a>			
Reporting Hierarchy					
Reports To:	<input type="text"/>	Dotted-Line Reports To: <input type="text"/>			
<input type="button" value="Submit for Dep't &amp; Central Approval"/>		<input type="button" value="Submit for Central Approval"/>		<input type="button" value="Submit for Dep't Approval"/>	
				<input type="button" value="Save for Later"/>	
				<input type="button" value="Cancel/Return"/>	

- **Original Position Start Date:** Original start date of position (not employee), if known, otherwise the date position created in position management. Date must precede all employee hire dates into the position.
- **Max. FTE:** Enter the maximum, total number of full-time equivalents associated with this position.
- **Max. Head Count:** Enter the maximum, total number of employees associated with this position.
- **Anticipated Hire Date:** Anticipated start date of an incumbent.
- **Position End Date:** Enter end date for all term positions; if position is ongoing, leave blank.
- **Campus, VP/Faculty, Department, Location:** Enter the codes associated with the department.
- **Employment Group, Job Family, Job Code/Classification Title:** Enter the codes associated with the job.
- **Central Approval Required:** Indicates if position requires H.R., F.R., and/or Vice-Provost approval (M&P, SUD, Excluded M&P, UBC-O BCGEU and some Faculty positions).
- **Business Title:** Enter appropriate working title (max. 50 characters).
- **Does the position require UBC to do a Criminal Record Check?:** Select Yes or No (click on “More on criminal record check” hyperlink to determine if the position requires it).
- **Does the position require inclusion in the Occupational & Preventative Health program?:** Select Yes or No (click on “More on OPH Program” hyperlink to determine if the position requires it).
- **Reports To:** Enter Position number of position the new Position number reports to.
- **Dotted-Line Reports To:** Enter Position number of position the new Position number has a dual reporting relationship to.

**Important:** Click on  at any time to save partially completed work.

**Note:** The **VP/Faculty** and **Department** fields will be restricted to the VP/Faculty/Department codes you have security access to.

## 2.2.3 Enter Job Description/Ad

[Position Information](#) | **Job Description/Ad** | [Approvals](#) | [Budget](#) | [Incumbents](#) | [Attach Documents](#) | [Joint Position](#)

Position Management

Position Number: NEW      Created By: Kathy Soudress      Created On: 01/30/2013

---

**Job Information** Find | View All    First 1 of 1 Last

Approval Status: Draft      Eff Date: 01/30/2013      Sequence: 0

Department: History

Employment Group: Faculty (Fac Assn)      Job Family: Regular

Job Code: BURG01 Professor (tenure)      Grade: N/A

Level:      Business Title: Professor (tenure)

Job Standard Code: N/A      Classification Title: Professor (tenure)

---

**Faculty Job Description/Ad**

Enter or cut and paste your Faculty Job Ad in the box below.  
Click on the icon beside the text box to use spell check.

**NOTE:** If this position is being posted on the UBC Careers website, the standard UBC equity statement will be automatically inserted into the job ad when the job opening/posting is created. Please ensure that the equity statement appears in all other forms of online and print advertising for this position.

Applications are invited for a 3-year\* limited-term position at the rank of Assistant Professor Without Review to commence July 1, 2013. \*The initial appointment will be for a 12-month period and may be renewed for up to two more years, subject to satisfactory performance appraisals, compliance with UBC agreements and policies, and availability of funds.

Candidates should have a specialization in the acquisition of Italian as a Second or Foreign Language and experience in using and developing language instruction technology on different platforms. The successful candidate for this position will teach Italian language and culture courses at all levels. He or she will be expected to maintain an active program of research and teaching, and to undertake student advising duties and other service assignments as appropriate in connection with the development of the Italian language program, and more generally within the Department.

A completed Ph.D. (or solid indication of imminent completion) in Italian or an equivalent doctoral degree is required. Candidates must have native or near-native fluency in Italian, appropriate expertise in L2 and L3, as well as an excellent command of English to

- **Faculty Job Description/Ad:** Enter the Faculty Job Ad in this box.

must have native or near-native fluency in Italian, appropriate expertise in L2 and L3, as well as an excellent command of English to teach Italian Studies courses. They will also demonstrate excellence or clear promise of excellence in research and teaching.

[Print Job Description/Ad](#)

[Submit for Dept & Central Approval](#)   [Submit for Optional Central Approval](#)   [Submit for Dept Approval](#)

[Save for Later](#)   [Cancel/Return](#)

**Important:** Click on [Save for Later](#) at any time to save partially completed work.

**Note:** Click on [Print Job Description/Ad](#) to print a formatted and printer-friendly version of your job description after you have saved your work.

## 2.2.4 Review Approvals

[Position Information](#) [Job Description/Ad](#) **Approvals** [Budget](#) [Incumbents](#) [Attach Documents](#) [Joint Position](#)

**Position Management**

**Position Number:** NEW      **Created By:** Kathy Stoudreau      **Created On:** 01/30/2013      [Need Help?](#)

**Position Information**      [Find](#) | [View All](#)      First  1 of 1  Last

**Approval Status:** Draft      **Eff Date:** 01/30/2013      **Sequence:** 0

**Department:** History

**Employment Group:** Faculty (Fac Assn)      **Job Family:** Regular

**Job Code:** BURG01 Professor (tenure)      **Grade:** N/A

**Level:**      **Business Title:** Professor (tenure)

**Job Standard Code:** N/A      **Classification Title:** Professor (tenure)

**Originator Comments**

**Comments:**

**Questions regarding the content of this position should be directed to:**

**Name:**       **Position:**

**Phone:**       **Email:**

Enter the contact information (**Name, Position, Phone, and Email**) for the person who would be best to answer any questions with respect to the job ad entered.

Approvals will be routed according to the rules defined in the workflow rules repository for your department.

Depending on which **Submit** button is clicked, the appropriate type of approval steps will be taken.

- **Submit for Dep't & Central Approval** – Both departmental and central approval steps.
- **Submit for Optional Central Approval** – Only central approval steps.
- **Submit for Optional Dep't Approval** – Only departmental steps.

When the position is submitted for approval, approvers will be notified via email that an approval request exists. Once approved or pushed back, the originator will likewise be notified via email as to the status of their position approval request.

**Important:** Click on  at any time to save partially completed work.

## 2.2.5 Enter Budget details

Position Information   Job Description/Ad   Approvals   **Budget**   Incumbents   Attach Documents   Joint Position

Position Management

Position Number: NEW   Created By: Kathy Soudreau   Created On: 01/30/2013

Position Information 1 of 1

Approval Status: Draft   Eff Date: 01/30/2013   Sequence: 0

Department: History

Employment Group: Faculty (Fac Assn)   Job Family: Regular

Job Code: BURG01 Professor (tenure)   Grade: N/A

Level:   Business Title: Professor (tenure)

Job Standard Code: N/A   Classification Title: Professor (tenure)

Salary Range as of date 01/30/2013

Funding Info

Funding Type: Budget Funded   A general description of the source of funding for this position - appears on the posting/ad.

Salary Commitments: Hire Data

For a filled position, this field instructs the budget interface to use either the hire data in HRMS or the position budget information (as described below) when calculating salary commitments.

For a vacant position, the budget interface will always use the position budget information below to calculate salary commitments.

Benefit commitments for both filled and vacant positions are always calculated based on the value in the Benefits Percent field below.

Benefits Percent: 15   This value is used to calculate benefit commitments required by the Budget system. It is used for both filled and vacant positions. You may override the default % value.

Funding Source: Existing Funds

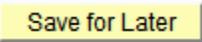
Budget Comments (Max 254 Characters)

- A summary of the **Position Information** appears above the salary range information.
- **Salary Range:** Displays current salary range for the position. Change **Salary Range as of date** to display historical salary ranges.
- **Funding Type:** Select appropriate funding type (**Budget, Grant, Self, or Multiple Sources**). This is displayed on job postings when the position is used to create a job opening/posting. It has no impact on Hyperion.
- **Salary Commitments:** Select which source the Hyperion budget system should reference for budget information for this position. If **Hire Data** is selected, Hyperion will use employee salary information from HRMS to calculate a budget. If **Posn Data** is selected, the budget system will use the budget information recorded below, on this page.
- **Benefit Percent:** Value defaults automatically based on the employer-paid benefit costs for the employment group selected for the position. The defaulted value is based on a monthly, ongoing positions (all benefit plans). Adjust the percentage for hourly positions or positions which are not entitled to all benefits.
- **Funding Source:** Indicate if the funding for the position comes from existing or new funding.
- **Budget Comments:** Enter comments relating to the position budget (for your own use and/or any approvers that will look at this later).

**Note:** The budget system will use position budget information for all unfilled positions, so it's important to keep the information for all your positions up to date. Inactivate or delete positions which are no longer used or were created in error.

**Funding Details (Account and Budget Details):** Multiple accounts and/or multiple funding periods for the position are recorded in this section. Click on the plus icons  where indicated in the screenshot on the preceding page to insert additional rows.

- **Begin Date:** This is the date the funding from the specified account(s) is in effect.
- **End Date:** This is the last date the funding from the specified account(s) is in effect. It is defaulted by the system as the day before the succeeding funding lines or to the position's end date.
- **Core Funding:** Click this checkbox for any funding that is designated as Core funding. This will be picked up in Core funding reports in Hyperion for positions where the Salary Commitment field is set to Posn Data. For positions designated as Hire Data, you must designate Core funding in HRMS hire records by putting the word CORE in the Reference field on appointment forms or on-line screens (eRecruit and ePAF).
- **SpeedChart:** Enter the four-digit, alpha **speedchart** which will be used to charge all salary and benefit related expenses for this position.
- **Account:** Enter the six-digit, numeric **account** code which corresponds to the employment group (Faculty, Staff, Student) and if the position is monthly or hourly paid. Click on the magnifying glass  icon for a list of valid values.  
**Note:** The speedchart and account combination must be an active account with a PG end date which does not precede the position begin or end dates.
- **Amount Type:** Select how the budget dollars in the amount fields are being expressed – Annually, Monthly, or Per Period.
- **Salary Amount:** Enter the total dollar amount, based on the **Amount Type** entered.  
**Note:** Annual amounts should be based on a twelve-month period, regardless of length of appointment.
- **Benefit Amount:** Displays the calculated total benefit costs, based on the **Benefit Percent** value.  
**Note:** Use this link <http://finance.ubc.ca/payroll/references-and-tools/payroll-calculators> to assist you in calculating annual benefit costs.

**Important:** Click on  at any time to save partially completed work.

## 2.2.6 Review Incumbents

Position Information
Job Description/Ad
Approvals
Budget
Incumbents
Attach Documents
Joint Position

**Position Management**

**Position Number:** NEW      **Created By:** Kathy Bourbeau      **Created On:** 01/30/2013

**Position Information** Find | View All    First 1 of 1 Last

**Approval Status:** Draft      **Eff Date:** 01/30/2013      **Sequence:** 0  
**Department:** History  
**Employment Group:** Faculty (Fac Assn)      **Job Family:** Regular  
**Job Code:** BURG01 Professor (tenure)      **Grade:** N/A  
**Level:**      **Business Title:** Professor (tenure)  
**Job Standard Code:** N/A      **Classification Title:** Professor (tenure)

**Incumbents**

**As of Date** 01/30/2013       **Current Head Count:** 0    **Out Of** 0

**Current Incumbents** Customize | Find     First 1 of 1 Last

EmplID	Empl Rcd Nbr	Name	Compensation Rate	Job Data
0				<a href="#">Job Data</a>

Submit for Dep't & Central Approval

Submit for Optional Central Approval

Submit for Dep't Approval

Save for Later

Cancel/Return

- **Incumbents** page displays a list of current incumbents attached to the position. Data will only appear here for existing positions which have active incumbents.
- Change **As of Date** and refresh button to display incumbents attached to the position historically or in the future.
- **Current Head Count: # Out Of #** displays the total number of employees occupying the position out of the total number designated as the Max Head Count (see Position Information page).
- Click on [Job Data](#) link to drill into job data component for employee selected.

**Important:** Click on  at any time to save partially completed work.

## 2.2.7 Attach Documents

Position Information | Job Description/Ad | Approvals | Budget | Incumbents | **Attach Documents** | Joint Position

Position Management

Position Number: NEW      Created By: Kathy Soudreau      Created On: 01/30/2013

---

**Position Information** Find | View All    First 1 of 1 Last

Approval Status: Draft      Eff Date: 01/30/2013      Sequence: 0

Department: History

Employment Group: Faculty (Fac Assn)      Job Family: Regular

Job Code: BURG01 Professor (tenure)      Grade: N/A

Level:      Business Title: Professor (tenure)

Job Standard Code: N/A      Classification Title: Professor (tenure)

---

**Position Attachments** Customize | Find | View All |    First 1-2 of 2 Last

File Name	*Description	Last Updated	Uploaded By
<input type="checkbox"/> <a href="#">Position Funding Approval.docx</a>	Funding Approval	01/30/2013 4:19PM	Kathy Soudreau
<input type="checkbox"/> <a href="#">Dept Organizational Tree.docx</a>	Organizational Tree	01/30/2013 4:18PM	Kathy Soudreau

- Upload any documents you wish to support the position (i.e., departmental organizational charts, funding authorizations, etc.).
- Click on the add attachment icon  to upload a document.
- Click on the delete attachment icon  to delete a document.
- Use the **Description** text box to clearly describe the attachment.

**Important:** Click on  at any time to save partially completed work.

## 2.2.8 Enter Joint Position details (if applicable)

Position Information
Job Description/Ad
Approvals
Budget
Incumbents
Attach Documents
Joint Position

Position Management

Position Number: NEW      Created By: Kathy Stouthrenou      Created On: 01/30/2013

Position Information Find | View All    First 1 of 1 Last

Approval Status: Draft      Eff Date: 01/30/2013      Sequence: 0  
 Department: History  
 Employment Group: Faculty (Fac Assn)      Job Family: Regular  
 Job Code: BURG01 Professor (tenure)      Grade: N/A  
 Level:      Business Title: Professor (tenure)  
 Job Standard Code: N/A      Classification Title: Professor (tenure)

Joint Position Info. (provide data for all departments) Customize | Find | View All    First 1-2 of 2 Last

#	Campus	VP/Faculty	*Department	*Location Code	Home Department Indicator	FTE	
1	Vancouver	ARTF	HIST	BUT	<input checked="" type="checkbox"/>	0.500000	+ -
2	Vancouver	ARTF	FHIS	BUT	<input type="checkbox"/>	0.500000	+ -

Submit for Dept & Central Approval
Submit for Optional Central Approval
Submit for Dept Approval
Save for Later
Cancel/Return

If the **Joint Position?** field was clicked on in the Position Information page (1<sup>st</sup> tab in component), you'll need to complete the **Joint Position** page.

- Enter the **Campus, VP/Faculty, Department, Location Code, Home Department Indicator** and **FTE** fields for all departments jointly sharing the position, including the home department.
- Click on the magnifying glass  icon for a list of valid values.
- Click on the plus icon  to insert a row to add joint department information.

**Note:** In order for positions to be retrieved in position management by both the home and non-home departments, the non-home department information, must be entered in its entirety on this page.

**Important:** Click on Save for Later at any time to save partially completed work.

## 2.2.9 Submit Position for approvals

Submit for Dep't  
& Central Approval

Submit for Optional  
Central Approval

Submit for Dep't  
Approval

Click on the appropriate **Submit** button to submit your position for approval.

Approvals will be routed according to the rules defined in the workflow rules repository for your department.

Depending on which **Submit** button is clicked, the appropriate type of approval steps will be taken.

- **Submit for Dep't & Central Approval** – Both departmental and central approval steps.
- **Submit for Optional Central Approval** – Only central approval steps.
- **Submit for Optional Dep't Approval** – Only departmental steps.

**Approvers List**

Approval Step	Approval Rank	Approver Category	User ID	Name
1	Dept Admin.	Secondary	JMORRISN	Janice Morrison
1	Dept Admin.	Primary	LESLEEDF	Leslie Fernandez
2	Dept Head (or delegate)	Primary	GREENY12	Sheldon Green
3	Faculty Admin.	Primary	SIYEE	Sue Yee
3	Faculty Admin.	Secondary	SELLEN	Ellen Siu
4	Faculty Admin.	Primary	ANNEMACL	Anna MacLean
4	Faculty Admin.	Secondary	BRGAS	Nadine Janikowski

Are these Approvers/Steps correct?  Yes  No If Yes button is not available for selection, the system detected a problem with your departmental approvals.

Click [here](#) to review departmental approval steps for this transaction.

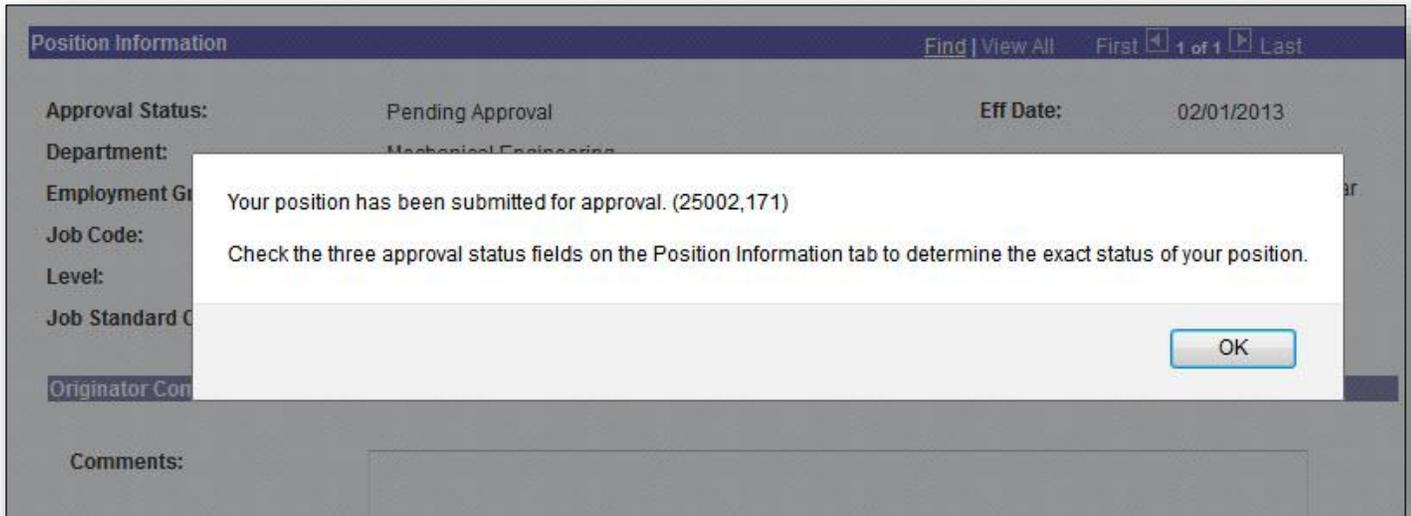
Click [here](#) for help with approver errors appearing on this page.

**Return**

You will be presented with a list of approvers which have been determined by the rules entered into the Workflow Rules Repository for your department.

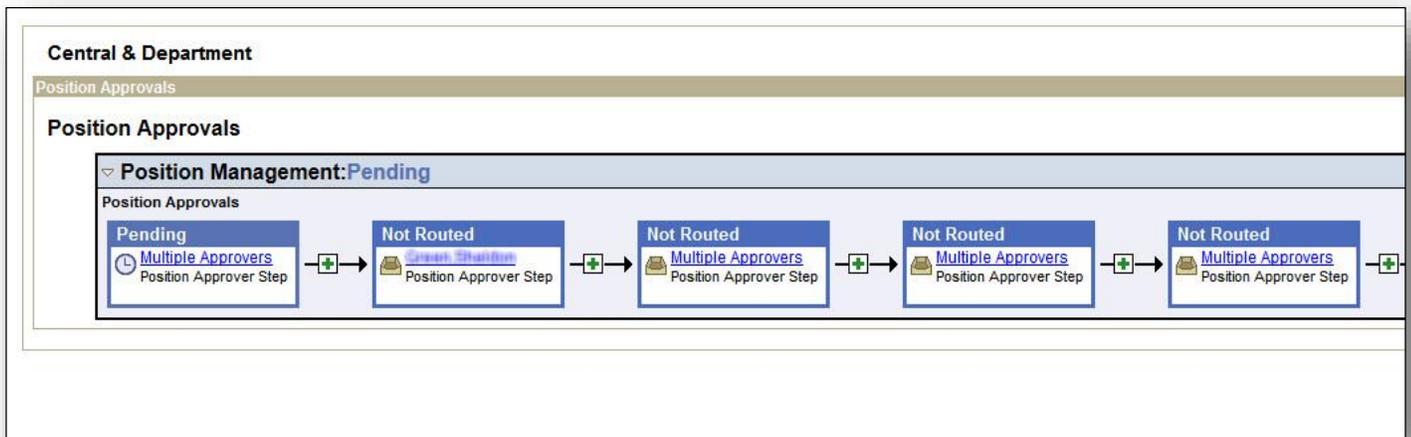
If the list is correct, confirm this by selecting **Yes** and click on **Return**.

If the list is **not** correct, select **No** and click on **Return**. Contact your department workflow admin to review and modify the rules that has been setup for your department. After the problem has been fixed, re-submit the position for approval and review the list again.

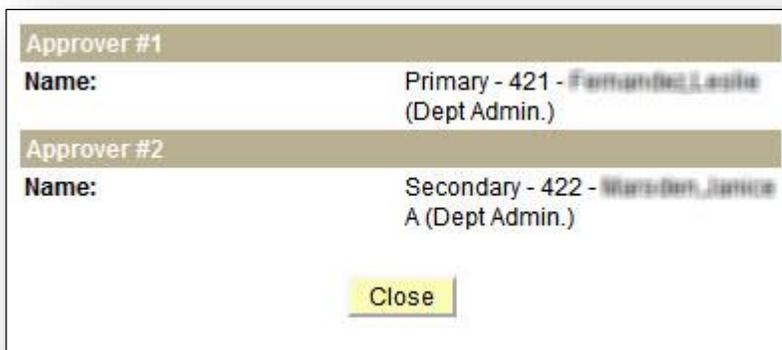


Once you have successfully submitted your position for approval, you will be presented with a confirmation panel.

Click .



You will also be presented with a graphical flowchart of the steps in your approval workflow. Each step will indicate who the approver(s) are and what the current status is. If there are **multiple approvers**, clicking on [Multiple Approvers](#) will list all the approvers for that step (see below)



You may also insert additional approvers and reviewers between steps by clicking on . A panel will appear to allow you to select the user as well as their role in the approval process (see below).

### Insert additional approver or reviewer

Choose an approver or reviewer to insert

User ID:  

Insert as:  Approver  
 Reviewer

Please enter an approver / reviewer.  
To search for a list of values click the lookup  icon.

If position is being submitted for approval, the Position Approval Status changes to Pending Approval. Approvers will be notified via email that an approval request exists. Once approved or pushed back, the originator will likewise be notified via email as to the status of their position approval request.

**Position Information** | Job Description/Ad | Approvals | Budget | Incumbents | Attach Documents | Joint Position

Position Management

Position Number: 00032117    Created By: Kathy Bourreau    Created On: 02/01/2013

**Position Information**    Find | View All    First  1 of 1  Last

\* Event: 1. Add New Position    \* Event Start Date: 02/01/2013    \* Sequence: 0

Data Entry Date: 02/01/2013    Last Updated By: Kathy Bourreau    Will you be posting this position?

**Status**

Position Status:	Active	Overall Position Approval Status:	Pending Approval
		Central Approval Status:	Pending Approval
		Department Approval Status:	Pending Approval
		Business Unit:	UBC01    UBC - Vancouver

**Type**

Position Type:  Opening Position     Non-UBC Post     Post     Unpaid Post

## 2.3 Position Approval Process

**Faculty Relations (UBC-V) / Human Resources (UBC-O)** and the respective **Provost's office** is responsible for approving all new Tenure and Tenured-Track Positions/Ads which fall under Faculty-FA (BOG). If the same approver occurs in different steps of the approval process, an approval action is still required for each step.

### 2.3.1 Email notification

Once the position is submitted for approval, Human Resources/Faculty Relations will receive an email notification advising them that a position requires approval. The approver is then directed to a PeopleSoft **Worklist** page via a link in the email:

#### Approval Request Email:

**Approval is Requested for HRMS Position (00032119) Professor (tenure) in History**

kathy@hr.ubc.ca  
 Sent: Tue 2/05/13 11:30 AM  
 To: Can, Michael; rosmal@ubc.ca

A position has been created or updated in the Human Resources Management System (HRMS). Your approval is required.

Position Number: 00032119  
 Position Title: Professor (tenure)  
 Department: History

To view this position, click on the link below. This link will bring you to your HRMS 'Worklist' page. The transaction will be listed under the 'Work Item' column as an 'Approval Routing'.

[https://www.auth.cwl.ubc.ca/auth/login?serviceName=hr\\_portal\\_psa&serviceParams=context%3DO%26target%3Dworklist](https://www.auth.cwl.ubc.ca/auth/login?serviceName=hr_portal_psa&serviceParams=context%3DO%26target%3Dworklist)

If you require assistance with approving this position, please go to:

<http://www.hr.ubc.ca/information-systems/hrms/hrms-uniform-workflow/quick-help-guides/position-management-quick-help-guide-for-approvers/>

Thank you.

#### Approver's Worklist Page:

Worklist for ADAMS2: 422 - Harder,Alicia C

[Detail View](#) Approver Category: Primary Approver Work List Filters: Approval Routing

From	Date From	Work Item	Worked By Activity	Priority	Approver Category	Link		
Hanson, Kathy	02/05/2013	Approval Routing	Approval Workflow		Primary Approver	<a href="#">Position:00032119 Dept ID:HIST Union Cd:BOG</a>	Mark Worked	Reassign
System Administrator	01/17/2013	Approval Routing	Approval Workflow		Primary Approver	<a href="#">Position:00032095 Dept ID:HIST Union Cd:BOG</a>	Mark Worked	Reassign
Consultant	11/23/2012	Approval Routing	Approval Workflow		Primary Approver	<a href="#">Job Opening ID:14074 Dept ID:HIST Union Cd:C29</a>	Mark Worked	Reassign
108 - Sains, Alexander	11/22/2012	Approval Routing	Approval Workflow		Primary Approver	<a href="#">Job Opening ID:14075 Dept ID:HIST Union Cd:C16</a>	Mark Worked	Reassign

## 2.3.2 Approval Status and History

The Approval Status/History page is where the approval is recorded and submitted.

**Position Management**

Position Number: 00032119      Created By: Kathy Boudreau      Created On: 02/05/2013

**Position Information**      Find | View All      First 1 of 1 Last

**Approval Status:** Pending Approval      **Eff Date:** 02/01/2013      **Sequence:** 0

**Department:** History

**Employment Group:** Faculty (Fac Assn)      **Job Family:** Regular

**Job Code:** BURG01      Professor (tenure)      **Grade:** N/A

**Level:**      **Business Title:** Professor (tenure)

**Job Standard Code:** N/A      **Classification Title:** Professor (tenure)

**Originator Comments**

Comments:

Questions regarding the content of this position should be directed to:

**Name:**      **Position:**

**Phone:**      **Email:**

**Central & Department**

**Position Approvals**

**Position Approvals**

**Position Management: Pending**

Position Approvals

Pending → Not Routed → Not Routed → Not Routed → Not Routed

Multiple Approvers Position Approver Step → Multiple Approvers Position Approver Step → 412 - Kathy Boudreau Position Approver Step → Multiple Approvers Position Approver Step → Multiple Approvers Position Approver Step

Approve      Pushback

Approver selects **'Approve'** or **'Pushback'**.

If **'Pushback'** is selected, Approver should provide reason and changes required in comments box.

If **'Approve'** is selected, the Worklist item will disappear from the Approvers Worklist. The system will automatically send an email notification to the originator advising them of the approval status (and will appear on their Worklist).

The Approvals page after clicking on Approve:

Position Information
Job Description/Ad
Approvals
Budget
Incumbents
Attach Documents
Joint Position

**Position Management**

**Position Number:** 00032119      **Created By:** Kathy Boudreau      **Created On:** 02/05/2013

**Position Information**
Find | View All    First 1 of 1    Last

**Approval Status:** Pending Approval      **Eff Date:** 02/01/2013      **Sequence:** 0  
**Department:** History  
**Employment Group:** Faculty (Fac Assn)      **Job Family:** Regular  
**Job Code:** BURG01      Professor (tenure)      **Grade:** N/A  
**Level:**      **Business Title:** Professor (tenure)  
**Job Standard Code:** N/A      **Classification Title:** Professor (tenure)

**Originator Comments**

**Comments:**

Questions regarding the content of this position should be directed to:

**Name:**      **Position:**  
**Phone:**      **Email:**

**Central & Department**

**Position Approvals**

**Position Approvals**

Position Management: Pending

**Position Approvals**

```

            graph LR
              A[Approved  
422 - Heather Adams C  
Position Approver Step  
2/5/2013 - 11:41 AM] --> B[Pending  
Multiple Approvers  
Position Approver Step]
              B --> C[Not Routed  
412 - Kathy Boudreau  
Position Approver Step]
              C --> D[Not Routed  
Multiple Approvers  
Position Approver Step]
              D --> E[Not Routed  
Multiple Approvers  
Position Approver Step]
          
```

2.3 Position Approval Process

Page 27 of 45

## 2.4 Edit Position Information

Navigation: Position Management>Add/Update Position Info.

### 2.4.1 Find an existing position

### Position Management

Complete all or some of the fields below and click on the 'Add/Search' button.  
Click on the magnifying glass to select from a list of valid values.  
The values selected here can be changed in the screens which follow, if necessary.

**Position Number:**  

**OR**

**Enter information in the following fields to locate the Position Number**

**Campus:**   Vancouver

**VP/Faculty:**   Faculty of Arts

**Department Code:**   History

**Employment Group:**   Faculty (Fac Assn)

**Job Family:**   Regular (RG)

**Job Code:**   Professor (tenure)

**Job Title Key Word Search:**

**Incumbent Name:**    
Enter Last Name, First Name (or initial)

**OR**

**My Positions**

- Click on the magnifying glass icon  for a list of valid values.
- Enter fields in order that they appear

## 2.4.2 Select the position to update

Click on the checkbox adjacent to the position selected. Click on **Update** to access position information.

[Add/Update/Copy Position](#) [Need Help?](#)

The following positions exist which match your criteria.

Position Search Results								
	Position No.	Employment Group	Job Family	Job Code	Classification Title	Business Title	Approval Status	Position Status
<input checked="" type="checkbox"/>	00004995	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	OK for ePAF only	Active
<input type="checkbox"/>	00006165	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	OK for ePAF only	Active
<input type="checkbox"/>	00009841	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	OK for ePAF only	Active
<input type="checkbox"/>	00032095	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	Pending Approval	Active
<input type="checkbox"/>	00032113	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	Draft	Active
<input type="checkbox"/>	00032119	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	Pending Approval	Active

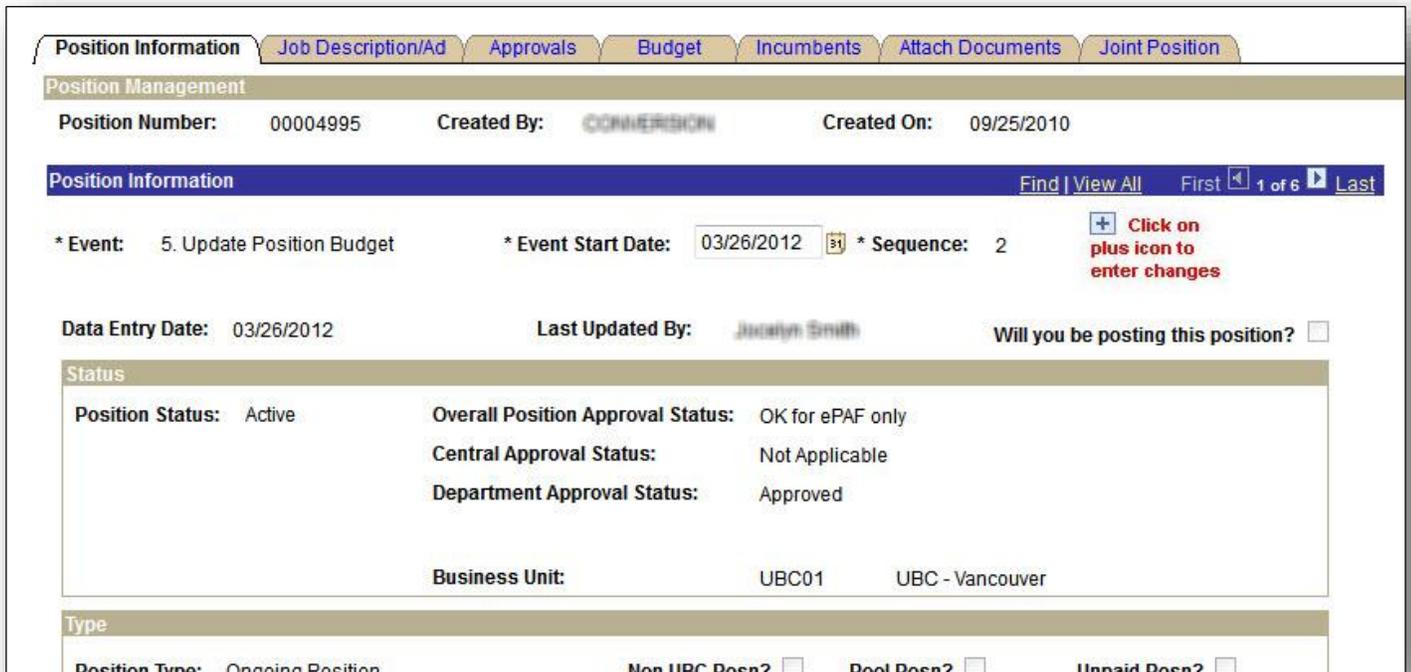
**Important note:** Only positions which are in an **Approved** or **Draft Approval** status and are in a department you have security access to can be updated.

Positions which require approval (e.g. BOG), require that you insert a new effective-dated row. Existing data, with the exception of the **Event Start Date**, cannot be modified for these Positions.

For positions requiring approval, changes to the Employment Group, Job Family, Job Code, and/or any sections in the Position Information page will generate a new approval request.

### 2.4.3 Positions and effective dates

Click the plus icon  to insert a new effective-dated row:



The screenshot displays the HRMS Position Management interface. At the top, there are tabs for "Position Information", "Job Description/Ad", "Approvals", "Budget", "Incumbents", "Attach Documents", and "Joint Position". Below the tabs, the "Position Management" section shows "Position Number: 00004995", "Created By: CONNERSON", and "Created On: 09/25/2010". A "Position Information" header is followed by a table of events. The first event is "5. Update Position Budget" with an "Event Start Date" of "03/26/2012" and a "Sequence" of "2". A plus icon is visible next to the "Event Start Date" field, with a red text prompt: "Click on plus icon to enter changes". Below the table, there are fields for "Data Entry Date: 03/26/2012", "Last Updated By: Jocelyn Smith", and a checkbox for "Will you be posting this position?". A "Status" section shows "Position Status: Active", "Overall Position Approval Status: OK for ePAF only", "Central Approval Status: Not Applicable", and "Department Approval Status: Approved". The "Business Unit" is "UBC01 UBC - Vancouver". A "Type" section shows "Position Type: Ongoing Position" and checkboxes for "Non UBC Posn?", "Pool Posn?", and "Unpaid Posn?".

#### The importance of the Event Start Date field:

The **Event Start Date** or effective date of your position is very important. This date enables you to maintain a complete chronological history of all your position data, whether you changed them two years ago or want them to go into effect in two months. With this information, you can do statistical analysis at a particular point in time in the past, now or in the future.

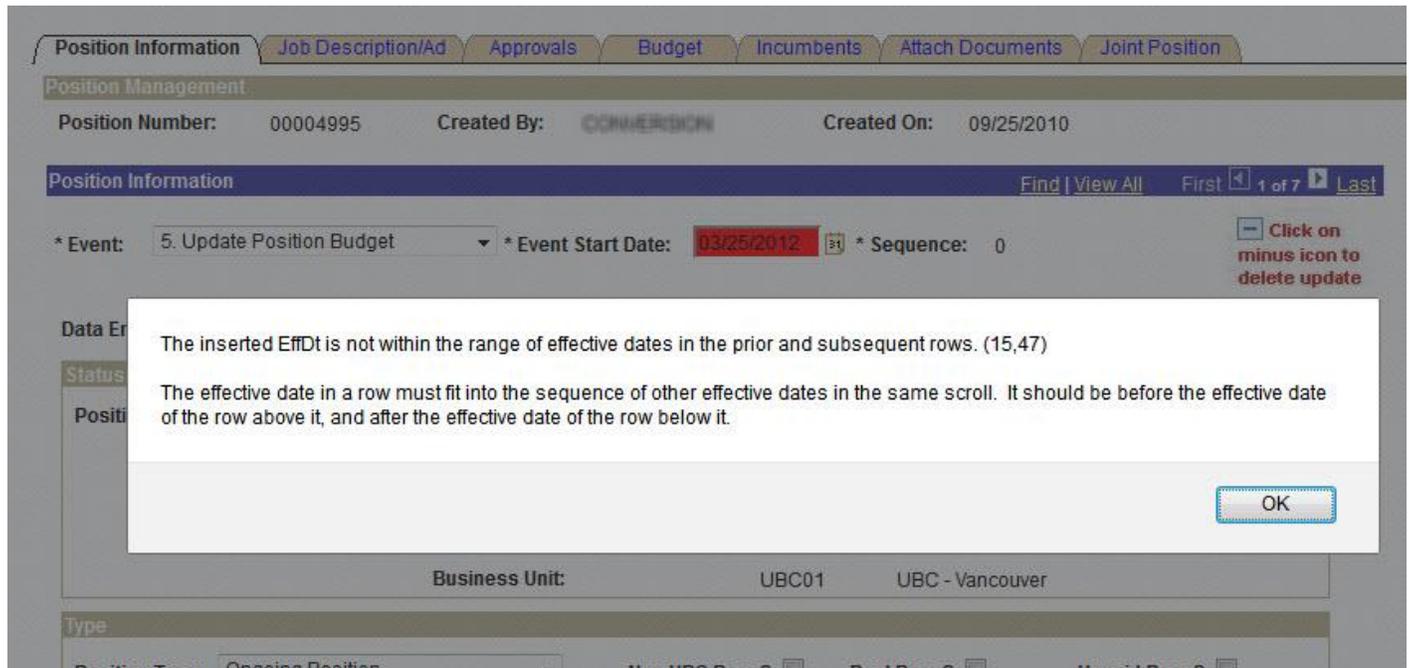
The system also uses the **Event Start Date** field to compare pages and tables to system prompt tables that you see displayed throughout position management so that the data displayed is valid as of the effective date of the page on which you're working.

The **Event Start Date** is particularly important when making changes to a position which affects the incumbents attached to it. Let's take an example of a departmental reorganization. Several new departments are created and employees are being moved to them. You'll want to update the department in position management to reflect this change and record when it went into effect using the **Event Start Date**. Then you'll want to update the department (via Payroll eForms or appointment forms) for the employees attached to the position in their individual HRMS job records, using the same date. You'll need to use the same date for both transactions in order to successfully record the department changes. If the position date has an **Event Start Date** which is greater than the employee's department change in HRMS, the transaction required to update the incumbents' job records will not be possible.

## Correcting Event Start Date Entries:

The **Event Start Date** may be overwritten and corrected. If you get the error below when attempting to correct an **Event Start Date**, you must overwrite and correct the existing event start date(s) entries.

Do **not** select  Click on plus icon to enter changes



Position Information | Job Description/Ad | Approvals | Budget | Incumbents | Attach Documents | Joint Position

Position Management

Position Number: 00004995 Created By: COMMERBON Created On: 09/25/2010

Position Information Find | View All First 1 of 7 Last

\* Event: 5. Update Position Budget \* Event Start Date: 03/25/2012 \* Sequence: 0

Click on minus icon to delete update

Data Entry

Status

Position

The inserted EffDt is not within the range of effective dates in the prior and subsequent rows. (15,47)

The effective date in a row must fit into the sequence of other effective dates in the same scroll. It should be before the effective date of the row above it, and after the effective date of the row below it.

OK

Business Unit: UBC01 UBC - Vancouver

Type

Position Type: Ongoing Position

When multiple **Event Start Date** entries require correction, ensure you correct them in correct chronological order, starting with the oldest date. Save your work after each **Event Start Date** correction.

## 2.4.4 Events and the Event Start Date

Enter **Event** and **Event Start Date** and make required changes to position:

Position Management

Position Number: 00004995    Created By: CONVERSION    Created On: 09/25/2010

Position Information    Find | View All    First 1 of 7 Last

\* Event: 2. Update Position    \* Event Start Date: 02/05/2013    \* Sequence: 0

Data Entry Date: 03/26/2012    Last Updated By: Jocelyn Smith    Will you be posting this position?

Status

Position Status: Active    Overall Position Approval Status: OK for ePAE only

### Event:

- 2. Update Position  
When making changes to information which doesn't involve a reclassification or position budget changes.
- 3. Reclassify Position  
To record job reclassifications. However, for retroactive reclassifications, it is advised to create a new position.
- 5. Update Position Budget  
To record position budget changes.

**Event Start Date:** When making changes on a pushed back transaction, ensure you use the **same** date you used on the submitted transaction.

**Sequence:** The **sequence** number is connected to the **Event Start Date** and defaults automatically. All unique event start dates are connected to sequence number zero. When multiple effective dates are entered with the same value, the sequence numbers will be assigned sequentially. The system considers the event start date/sequence combination which has the highest sequence number as the correct transaction.

To illustrate this concept, consider the following example:

Event: Add New Position	Event Start Date: July 1, 2010	Sequence: 0	
Event: Update Position	Event Start Date: July 1, 2010	Sequence: 1	← System will consider this transaction and ignore the other

In addition, when hiring an incumbent into a position, the incumbent's hire date **cannot** precede the initial **Event Start Date** of the position. Using the example above, you could not hire someone into this position with these dates prior to July 1, 2010.

Make any changes required to the position information. Note that certain changes made to the position information, may require re-approval. For example, changing the position classification information and/or job description may require re-approval if the job classification type warrants ((i.e., M&P positions).

Click on the appropriate **Submit** button to submit your position for approval.

## 2.5 Copy a Position

Navigation: Position Management>Add/Update Position Info.

### 2.5.1 Find an existing position

### Position Management

Complete all or some of the fields below and click on the 'Add/Search' button.  
Click on the magnifying glass to select from a list of valid values.  
The values selected here can be changed in the screens which follow, if necessary.

**Position Number:**  

**OR**

**Enter information in the following fields to locate the Position Number**

**Campus:**   Vancouver

**VP/Faculty:**   Faculty of Arts

**Department Code:**   History

**Employment Group:**   Faculty (Fac Assn)

**Job Family:**   Regular (RG)

**Job Code:**   Professor (tenure)

**Job Title Key Word Search:**

**Incumbent Name:**    
Enter Last Name, First Name (or initial)

**OR**

**My Positions**

- Click on the magnifying glass icon  for a list of valid values.
- Enter fields in order that they appear

## 2.5.2 Select the position to copy

Click on the checkbox adjacent to the position selected. Click on **Update** to access position information.

[Add/Update/Copy Position](#) [Need Help?](#)

The following positions exist which match your criteria.

Position Search Results								
Position No.	Employment Group	Job Family	Job Code	Classification Title	Business Title	Approval Status	Position Status	
<input checked="" type="checkbox"/>	00004995	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	OK for ePAF only	Active
<input type="checkbox"/>	00006165	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	OK for ePAF only	Active
<input type="checkbox"/>	00009841	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	OK for ePAF only	Active
<input type="checkbox"/>	00032095	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	Pending Approval	Active
<input type="checkbox"/>	00032113	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	Draft	Active
<input type="checkbox"/>	00032119	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	Pending Approval	Active

[Add New Position](#) [Update](#) [Copy](#) [Back to Search Page](#)

Important note: You will be permitted to copy only those Positions with the following Approval Statuses:

- **Approved, OK to Post**
- **Approved**
- **Self-Approved, OK to Post**
- **N/A**

[Add/Update/Copy Position](#) [Need Help?](#)

The following positions exist which match your criteria.

Position Search Results								
Position No.	Employment Group	Job Family	Job Code	Classification Title	Business Title	Approval Status	Position Status	
<input type="checkbox"/>	00004995	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	OK for ePAF only	Active
<input type="checkbox"/>	00006165	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	OK for ePAF only	Active
<input type="checkbox"/>	00009841	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	OK for ePAF only	Active
<input type="checkbox"/>	00011380	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	OK for ePAF only	Active
<input type="checkbox"/>	00014436	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	OK for ePAF only	Active
<input type="checkbox"/>	00014910	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	OK for ePAF only	Active
<input type="checkbox"/>	00017891	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	OK for ePAF only	Active
<input type="checkbox"/>	00019345	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	OK for ePAF only	Active
<input type="checkbox"/>	00019346	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	OK for ePAF only	Active
<input type="checkbox"/>	00032095	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	Pending Approval	Active
<input type="checkbox"/>	00032113	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	Draft	Active
<input checked="" type="checkbox"/>	00032119	Faculty-FA	Regular	BURG01	Professor (tenure)	Professor (tenure)	Pending Approval	Active

**\*\*Notice\*\* (25002,27)**

This Position is pending approval and cannot be modified or copied at this time.

[OK](#)

[Add New Position](#) [View](#) [Copy](#) [Back to Search Page](#)

## 2.5.3 Enter Position Information

Position Information   Job Description/Ad   Approvals   Budget   Incumbents   Attach Documents   Joint Position   [Need Help?](#)

Position Management  
Position Number: NEW   Created By: I   Created On: 02/05/2013

Position Information   Find | View All   First 1 of 1 Last

\* Event: 1. Add New Position   \* Event Start Date: 02/05/2013   \* Sequence: 0  
Data Entry Date: 02/05/2013   Last Updated By: I   Will you be posting this position?

Status

Position Status: Active   Overall Position Approval Status: Draft  
Central Approval Status: Not Applicable  
Department Approval Status: Not Applicable  
Business Unit: UBC01   UBC - Vancouver

Type

Position Type:   Non UBC Posn?    Pool Posn?    Unpaid Posn?   
Joint Position?    Expansion Posn?    F-Slot:

Term

Original Position Start Date:   Max. FTE:   Max Head Count:   
Anticipated Hire Date:   Position End Date:

Work Location

\* Campus: VCVR   Vancouver  
\* VP/Faculty:     
\* Department:     
Location:  

Classification Information

Employment Group: BOG   Faculty (Fac Assn)  
Job Family: RG   Regular    Central Approval Required  
Job Code/ Classification Title: BURG01   Professor (tenure)  
Salary Admin. Plan: N/A   Grade: N/A   Job Standard Code: N/A  
Business Title: Professor (tenure)  
Does the position require UBC to do a Criminal Record Check?   [More on criminal record check](#)  
Does the position require inclusion in the Occupational & Preventative Health program?   [More on OPH Program](#)

Reporting Hierarchy

Reports To:   Dotted-Line Reports To:  

Note that fields may need to be entered or altered. For tenured Faculty positions, changes to most fields in the entire Position component will result in an approval workflow being launched. All tenured Faculty Positions require approval, regardless if an approved Position was copied or not.

**See:** Section 0 Enter Position Information above on page 12 for more information.

## 2.5.4 Review or modify Job Description/Ad

<a href="#">Position Information</a>	<a href="#">Job Description/Ad</a>	<a href="#">Approvals</a>	<a href="#">Budget</a>	<a href="#">Incumbents</a>	<a href="#">Attach Documents</a>	<a href="#">Joint Position</a>
<b>Position Management</b>						
<b>Position Number:</b>	NEW	<b>Created By:</b>	Kathy Brudreau	<b>Created On:</b>	02/05/2013	
<b>Job Information</b> <span style="float: right;">Find   View All First 1 of 1 Last</span>						
<b>Approval Status:</b>	Draft	<b>Eff Date:</b>	02/05/2013	<b>Sequence:</b>	0	
<b>Department:</b>						
<b>Employment Group:</b>	Faculty (Fac Assn)	<b>Job Family:</b>	Regular			
<b>Job Code:</b>	BURG01	Professor (tenure)	<b>Grade:</b>	N/A		
<b>Level:</b>		<b>Business Title:</b>	Professor (tenure)			
<b>Job Standard Code:</b>	N/A	<b>Classification Title:</b>	Professor (tenure)			
<b>Faculty Job Description/Ad</b>						
Enter or cut and paste your Faculty Job Ad in the box below. Click on the icon beside the text box to use spell check.						
<b>NOTE:</b> If this position is being posted on the UBC Careers website, the standard UBC equity statement will be automatically inserted into the job ad when the job opening/posting is created. Please ensure that the equity statement appears in all other forms of online and print advertising for this position.						
<div style="border: 1px solid black; padding: 5px;"><p>Applications are invited for a 3-year* limited-term position at the rank of Assistant Professor Without Review to commence July 1, 2013. *The initial appointment will be for a 12-month period and may be renewed for up to two more years, subject to satisfactory performance appraisals, compliance with UBC agreements and policies, and availability of funds.</p><p>Candidates should have a specialization in the acquisition of Italian as a Second or Foreign Language and experience in using and developing language instruction technology on different platforms. The successful candidate for this position will teach Italian language and culture courses at all levels. He or she will be expected to maintain an active program of research and teaching, and to undertake student advising duties and other service assignments as appropriate in connection with the development of the Italian language program, and more generally within the Department.</p><p>A completed Ph.D. (or solid indication of imminent completion) in Italian or an equivalent doctoral degree is required. Candidates must have native or near-native fluency in Italian, appropriate expertise in L2 and L3, as well as an excellent command of English to teach Italian Studies courses. They will also demonstrate excellence or clear promise of excellence in research and teaching.</p></div>						

See: Section 2.2.3 Enter Job Description/Ad above on page 15 for more information.

## 2.5.5 Review Approvals

<a href="#">Position Information</a>	<a href="#">Job Description/Ad</a>	<a href="#">Approvals</a>	<a href="#">Budget</a>	<a href="#">Incumbents</a>	<a href="#">Attach Documents</a>	<a href="#">Joint Position</a>
<b>Position Management</b>						
<b>Position Number:</b>	NEW	<b>Created By:</b>	Kathy Boudreau	<b>Created On:</b>	02/05/2013	
<a href="#">Need Help?</a>						
<b>Position Information</b>			Find   View All    First ◀ 1 of 1 ▶ Last			
<b>Approval Status:</b>	Draft	<b>Eff Date:</b>	02/05/2013	<b>Sequence:</b>	0	
<b>Department:</b>						
<b>Employment Group:</b>	Faculty (Fac Assn)	<b>Job Family:</b>	Regular			
<b>Job Code:</b>	BURG01 Professor (tenure)	<b>Grade:</b>	N/A			
<b>Level:</b>	<b>Business Title:</b>		Professor (tenure)			
<b>Job Standard Code:</b>	N/A	<b>Classification Title:</b>	Professor (tenure)			
<b>Originator Comments</b>						
<b>Comments:</b>	<input type="text"/>					
<b>Questions regarding the content of this position should be directed to:</b>						
<b>Name:</b>	<input type="text"/>	<b>Position:</b>	<input type="text"/>			
<b>Phone:</b>	<input type="text"/>	<b>Email:</b>	<input type="text"/>			

See: Section 2.2.4 Review Approvals above on page 16 for more information.

## 2.5.6 Enter Budget details

Position Information
Job Description/Ad
Approvals
Budget
Incumbents
Attach Documents
Joint Position

**Position Management**

Position Number: NEW      Created By: Kathy Soudreau      Created On: 02/05/2013

**Position Information** 1 of 1

Approval Status: Draft      Eff Date: 02/05/2013      Sequence: 0

Department:

Employment Group: Faculty (Fac Assn)      Job Family: Regular

Job Code: BURG01 Professor (tenure)      Grade: N/A

Level:      Business Title: Professor (tenure)

Job Standard Code: N/A      Classification Title: Professor (tenure)

Salary Range as of date 02/05/2013

**Funding Info**

Funding Type:       A general description of the source of funding for this position - appears on the posting/ad.

Salary Commitments: Hire Data

For a filled position, this field instructs the budget interface to use either the hire data in HRMS or the position budget information (as described below) when calculating salary commitments.

For a vacant position, the budget interface will always use the position budget information below to calculate salary commitments.

Benefit commitments for both filled and vacant positions are always calculated based on the value in the Benefits Percent field below.

Benefits Percent: 15      This value is used to calculate benefit commitments required by the Budget system. It is used for both filled and vacant positions. You may override the default % value.

Funding Source: Existing Funds

Budget Comments (Max 254 Characters):

**Funding Details** Find    First 1 of 1 Last

\*Begin Date 02/05/2013       End Date

Account and Budget Details		Customize   Find   View All	First 1 of 1 Last
Core Funding?	*SpeedChart *Account	Description	Amount Type    Salary Amount    Benefit Amount    Total
1 <input type="checkbox"/>	<input type="text"/>	<input type="text"/>	0.000000

**Total Amount**

See: Section 2.2.5 Enter Budget details above on page 17 for more information.

## 2.5.7 Review Incumbents

Position Information | Job Description/Ad | Approvals | Budget | **Incumbents** | Attach Documents | Joint Position

Position Management

**Position Information** Find | View All First 1 of 1 Last

Approval Status: Draft Eff Date: 02/05/2013 Sequence: 0

Department:

Employment Group: Faculty (Fac Assn) Job Family: Regular

Job Code: BURG01 Professor (tenure) Grade: N/A

Level: Business Title: Professor (tenure)

Job Standard Code: N/A Classification Title: Professor (tenure)

**Incumbents**

As of Date  Refresh Current Head Count: 0 Out Of 0

**Current Incumbents** Customize | Find | First 1 of 1 Last

EmplID	Empl Rcd Nbr	Name	Compensation Rate	Job Data
	0			<a href="#">Job Data</a>

See: Section 2.2.6 Review Incumbents above on page 19 for more information.

## 2.5.8 Attach Documents

Position Information | Job Description/Ad | Approvals | Budget | Incumbents | **Attach Documents** | Joint Position

Position Management

**Position Information** Find | View All First 1 of 1 Last

Approval Status: Draft Eff Date: 02/05/2013 Sequence: 0

Department:

Employment Group: Faculty (Fac Assn) Job Family: Regular

Job Code: BURG01 Professor (tenure) Grade: N/A

Level: Business Title: Professor (tenure)

Job Standard Code: N/A Classification Title: Professor (tenure)

**Position Attachments**

No Attachments have been uploaded for this Position

[+ Add Attachment](#) [- Delete Attachment](#)

See: Section 2.2.6 Review Incumbents above on page 19 for more information.

## 2.5.9 Enter Joint Position details (if applicable)

**Position Management**

Position Number: NEW      Created By: Kathy Bourdreau      Created On: 02/05/2013

**Position Information** Find | View All      First 1 of 1 Last

Approval Status: Draft      Eff Date: 02/05/2013      Sequence: 0

Department:

Employment Group: Faculty (Fac Assn)      Job Family: Regular

Job Code: BURG01 Professor (tenure)      Grade: N/A

Level:      Business Title: Professor (tenure)

Job Standard Code: N/A      Classification Title: Professor (tenure)

**Joint Position Info. (provide data for all departments)** Customize | Find | View All | First 1 of 1 Last

Campus	VP/Faculty	*Department	*Location Code	Home Department Indicator	FTE
1					

See: Section 2.2.7 Attach Documents above on page 20 for more information.

## 2.5.10 Submit Position for approvals

Submit for Dep't & Central Approval      Submit for Optional Central Approval      Submit for Dep't Approval

Click on the appropriate **Submit** button to submit your position for approval.

Approvals will be routed according to the rules defined in the workflow rules repository for your department.

Depending on which **Submit** button is clicked, the appropriate type of approval steps will be taken.

See: Section 2.2.9 Submit Position for approvals above on page 22 for more information.

## 2.6 Delete a Position

Navigation: Position Management>Delete Positions

### 2.6.1 Create a Run Control ID

**UBC - Delete Position**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) | [Add a New Value](#)

**Search by:** Run Control ID begins with

Case Sensitive

[Search](#) | [Advanced Search](#)

No matching values were found.

[Find an Existing Value](#) | [Add a New Value](#)

Click on the **Add a New Value** tab. In the **Run Control ID** field, enter any value you wish (in this example we entered **DELETE\_POSITION**). Note that all Run Control ID's you create must be in one string (multiple words must be stringed together with an underscore).

**UBC - Delete Position**

[Find an Existing Value](#) | [Add a New Value](#)

**Run Control ID:**

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

Click on **Add** button.

This will permanently create this **Run Control ID** which will be tied to your PeopleSoft UserID. This step only needs to be done once.

## 2.6.2 Use an existing Run Control ID

**UBC - Delete Position**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

**Search by:** Run Control ID begins with

Case Sensitive

[Search](#) [Advanced Search](#)

**Search Results**  
View All First 1 of 1 Last

Run Control ID	Language Code
<a href="#">DELETE_POSITION</a>	English

[Find an Existing Value](#) | [Add a New Value](#)

Click on **Find an Existing Value** tab. In the **Run Control ID** field, enter the value you created earlier or leave the Run Control ID blank and click on the **Search** button to get a list of your Run Control IDs.

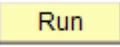
**Delete Position**

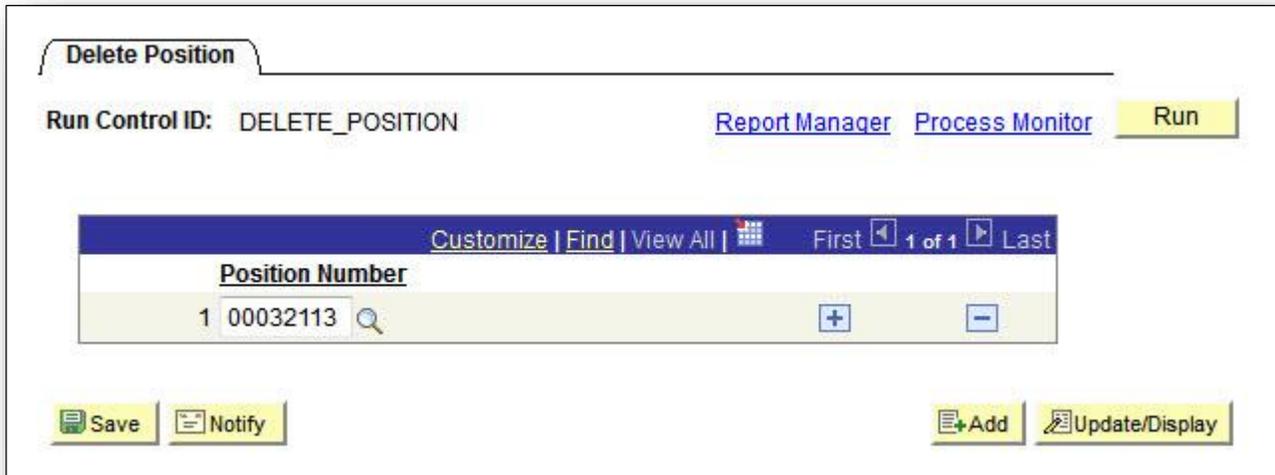
Run Control ID: DELETE\_POSITION [Report Manager](#) [Process Monitor](#) [Run](#)

Position Number
1 <input type="text"/>

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)

### 2.6.3 Select a Position to delete

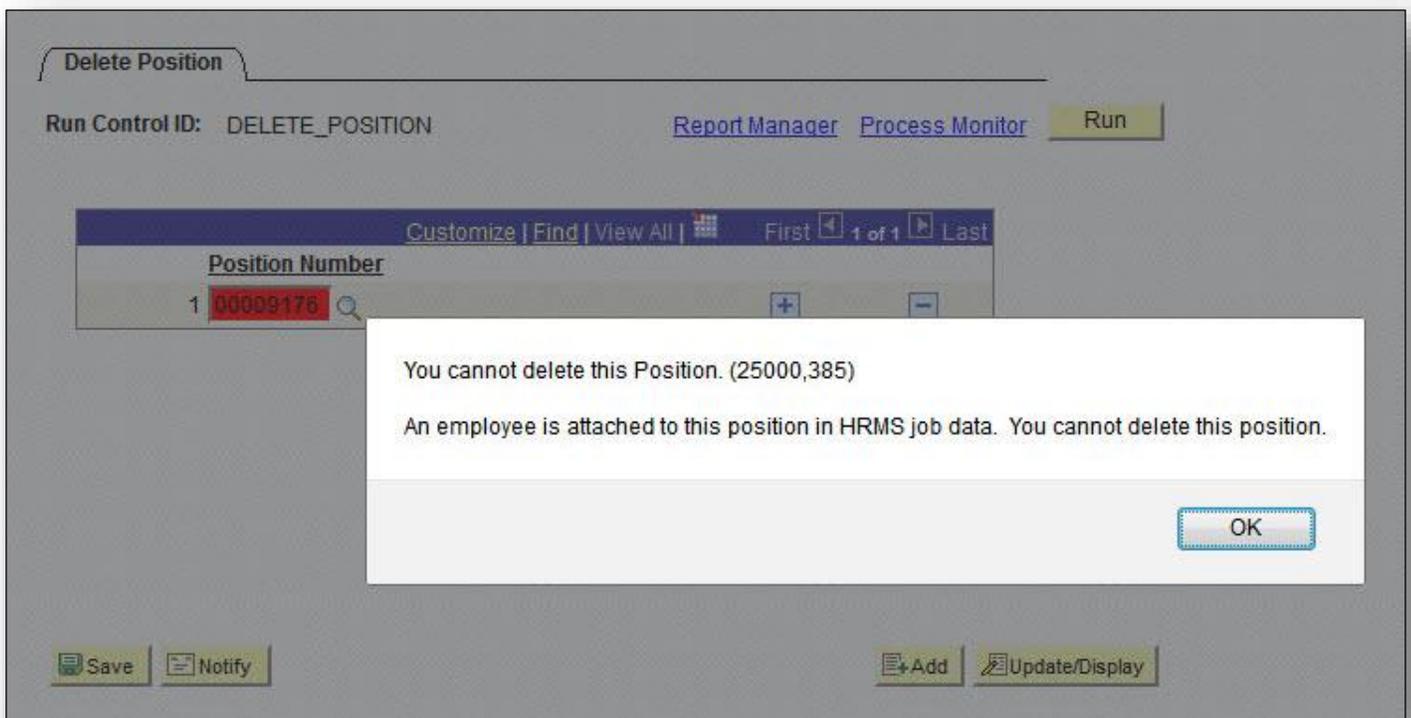
Enter Position Number(s) you wish to delete and then click on the  button.



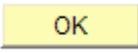
The following positions may be deleted from the database:

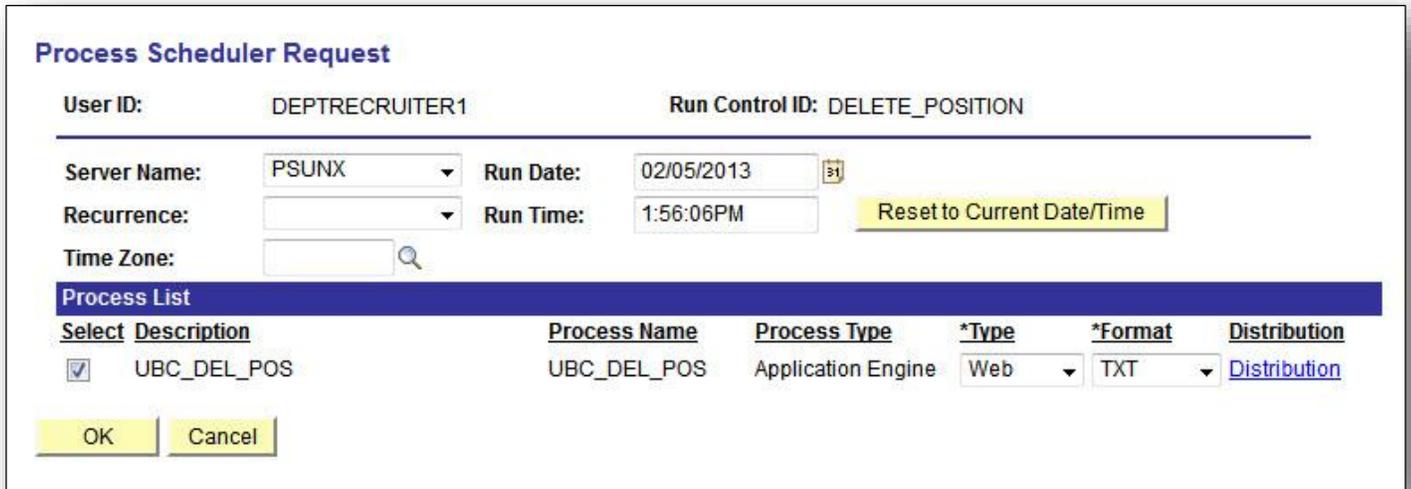
- Positions which have **not** been used to create a Job Opening in eRecruit and/or
- Positions which are **not** attached to an active employee's job record and/or
- Positions which have the following approval statuses: Approved, OK to Post, Approved, Approver, Self-Approved, Not Applicable.

You will receive an error message when you attempt to delete a position which does not meet the above criteria.



## 2.6.4 Run the delete process

In the **Server Name** field, click on the down arrow and select **PSUNX**. Click on the  button.



**Process Scheduler Request**

User ID: DEPTRECRUITER1      Run Control ID: DELETE\_POSITION

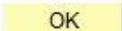
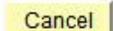
---

Server Name: PSUNX      Run Date: 02/05/2013  
Recurrence:      Run Time: 1:56:06PM      

Time Zone: 

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	UBC_DEL_POS	UBC_DEL_POS	Application Engine	Web	TXT	<a href="#">Distribution</a>

A **Process Instance** number should now appear, indicating that you've successfully launched the deletion process.

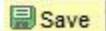
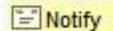
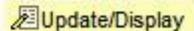


**Delete Position**

Run Control ID: DELETE\_POSITION      [Report Manager](#)      [Process Monitor](#)      

Process Instance: 127416

Customize   Find   View All		First	1 of 1	Last
Position Number				
1	00032113 			

The process takes approximately one minute for each position deletion.

## 2.6.5 Confirm the delete process

**Process List**

View Process Request For

User ID: DEPTRECRU  Type:  Last: 1 Days

Server:  Name:  Instance:  to

Run Status:  Distribution Status:   Save On Refresh

**Process List** Customize | Find | View All |  First  1 of 1  Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	127416		Application Engine	UBC_DEL_POS	DEPTRECRUITER1	02/05/2013 1:56:06PM PST	Success	Posted	<a href="#">Details</a>

[Go back to UBC - Delete Position](#)

To verify if the position has been deleted, navigate to **Position Management>Add/Update Position Info.** and enter the Position Number you had requested be deleted. The system should return a message stating the Position Number is invalid or 'no matching values were found'.

**Position Management**

Complete all or some of the fields below and click on the 'Add/Search' button.  
Click on the magnifying glass to select from a list of valid values.  
The values selected here can be changed in the screens which follow, if necessary.

Position Number:

Enter

Camp

VP/Fa

Depart

Employment Group:

Invalid value -- press the prompt button or hyperlink for a list of valid values (15,11)

The value entered in the field does not match one of the allowable values. You can see the allowable values by pressing the Prompt button or hyperlink.