

# Position Creation and Maintenance HR FRONT END TRAINING HOW-TO GUIDE



## Acknowledgements

Portions of this manual are based on Ellucian Banner System, Release 9.3.0.1.

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## Course Information

Course ID: Position Creation and Maintenance  
Revision Date: October 10, 2020  
Version: 1.0

### **APPROPRIATE USE AND SECURITY OF CONFIDENTIAL AND SENSITIVE INFORMATION**

*Similar to Banner, HRFE allows you to access confidential and sensitive information. Guidelines have been created to help you manage your responsibility.*

#### **You are responsible for any activity that occurs using your logon**

- Do not share your passwords or store them in an unsecured manner.
- Do not leave your workstation unattended while logged on to administrative information systems.

#### **You have access to very sensitive personal information**

- Do not share confidential and sensitive information with anyone, including colleagues, unless there is a business reason.
- Retrieve printed reports quickly, and do not leave the reports lying around in plain view.
- Secure reports containing confidential and sensitive information (e.g., FERPA, EEO, or HIPAA protected data).
- Shred the documents in a timely manner when disposing of reports containing confidential or sensitive information.

**Any violation could subject you to disciplinary action.**

## HR Front End Position Creation and Maintenance Quick View

- 1
  - Select Position Creation and Maintenance transaction.
- 2
  - Complete the Position Selection screen.
- 3
  - View the Incumbent History for an existing position (if necessary).
- 4
  - Complete the Position Data screen.
- 5
  - Transaction routed/applied to Banner.

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# TABLE OF CONTENTS

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<b>Introduction</b> .....	<b>5</b>
Assumptions .....	5
What is Position Creation and Maintenance?.....	5
Budget Organization Transfers .....	5
Re-Using Positions vs. Creating New Positions .....	6
Position Creation and Maintenance Responsibilities .....	6
Conventions Used in this Guide .....	6
<b>Performing Position Creation and Maintenance</b> .....	<b>7</b>
Initiating Position Creation and Maintenance .....	7
Selecting a Position.....	8
Maintaining an Existing Position and Viewing Incumbent History .....	9
Creating a New Position.....	13
Editing Position Data.....	14
<b>Appendix A – Position Creation and Maintenance Process Flow</b> .....	<b>16</b>

## ***Introduction***

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This guide will help you understand and process Position Creation and Maintenance transactions in the HR Front End. It includes an explanation of Position Creation and Maintenance transactions and gives general guidelines about when it is appropriate to use the Position Creation and Maintenance transaction type. It also provides instructions on how to complete Position Creation and Maintenance transactions.

## ***Assumptions***

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This guide assumes that you have completed the *HR Front End Overview and Navigation* online course. This prerequisite helps acquaint you with the general functionality of and navigation in the HR Front End. Material presented in the *HR Front End Overview and Navigation* course is not repeated in this guide.

Before processing a Position Creation and Maintenance transaction, ensure that prior approvals have been obtained where applicable.

## ***What is Position Creation and Maintenance?***

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A Position Creation and Maintenance transaction in the HR Front End gives you the ability to create a new position or maintain an existing position. When you search for an existing position, you also have the opportunity to view the Incumbent History for the position.

- **Create a New Position:** When you select this option, the Position Creation and Maintenance Wizard leads you through a series of screens to create a new position.

For example, an employee accepts a new job with your unit. No one has held this particular type of job in the unit before, so there is no existing position number to use. A Position Creation and Maintenance transaction must be completed to create a new position before the employee can be appointed to the new job. Whether the unit or a Central HR Office creates the position depends on your campus business procedure (see Position Creation and Maintenance Responsibilities).

- **Update an Existing Position and View Incumbent History:** You can access an existing position by either typing in the position number or by searching for the position. Searching for an existing position allows you to view the Incumbent History as part of the position maintenance process. The Incumbent History is a list of people who hold or have held the position.

Use the Position Creation and Maintenance Wizard only for maintenance of pooled or vacant single positions. If you select a filled single position for maintenance, you will be prompted to go to the incumbent's Employee Record View. From there you would complete the transaction as an Employee Job Record Change.

For example, when the position class and title are changed for a group of grads, the pooled position used for these grads needs to be updated. Use a Position Creation and Maintenance transaction to change the position class and title.

## ***Budget Organization Transfers***

In the HR Front End, budget organization transfers are processed as either Position Creation and Maintenance or Employee Job Record Change transactions, depending on the position. The guidelines are the same as those used for updating a position, since a budget organization transfer is a specific type of position maintenance. For pooled and vacant single positions, use Position Creation and Maintenance. For filled single positions use Employee Job Record Change.

## ***Re-Using Positions vs. Creating New Positions***

Before creating a new position, determine if there is an existing vacant position that can be re-used. Whether or not a vacant position can be re-used requires comparing the vacant position to the job that will be tied to that position. To help prevent the creation of unnecessary positions, you should re-use an existing vacant position when either of the following applies:

- The vacant position and the job have the same P-class, Title, Position Descriptors, etc.
- The vacant position and the job belong to the same employee group, even if the P-class, Title, Positions Descriptors, etc. do not match exactly. You have the option in the wizard to edit the P-class, Title, Position Descriptors, etc., of the position to match the job.

For example, a unit might have a vacant position from a job that no one will hold in the foreseeable future. This position could be modified and used for a new employee performing a different job within the same employee group.

If neither of the above conditions applies, then the Unit or Central HR Office can create a new position, as appropriate.

## ***Position Creation and Maintenance Responsibilities***

Whether the Unit or a Central HR Office is responsible for position creation and maintenance depends on the employee group and campus policy. The table below summarizes who is responsible for position creation and maintenance. Your campus HR offices also can help you determine who is responsible for creating and maintaining positions.

<b>Employee Group</b>	<b>Unit</b>			<b>Central HR Offices</b>		
Permanent/Status Civil Service				<b>UIUC</b>	<b>UIC</b>	<b>UIS</b>
Extra Help, Clerical				<b>UIUC</b>	<b>UIC</b>	<b>UIS</b>
Extra Help, Non-Clerical	<b>UIUC</b>				<b>UIC</b>	<b>UIS</b>
Student (SA)				<b>UIUC</b>	<b>UIC</b>	<b>UIS</b>
Faculty and Other Academic	<b>UIUC</b>	<b>UIC</b>	<b>UIS</b>			
Academic Professional	<b>UIUC</b>	<b>UIC</b>				<b>UIS</b>
Unpaid	<b>UIUC</b>	<b>UIC</b>	<b>UIS</b>			
Graduate Assistant	<b>UIUC</b>	<b>UIC</b>				<b>UIS</b>
Hourly (Acad. or Grad.)	<b>UIUC</b>	<b>UIC</b>				<b>UIS</b>

**Table 1: Position Creation and Maintenance Responsibilities**

## ***Conventions Used in this Guide***

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Indicates a **Note** or additional information that might be helpful to you.



Indicates a **Hint** such as a tip, shortcut, or additional way to do something.



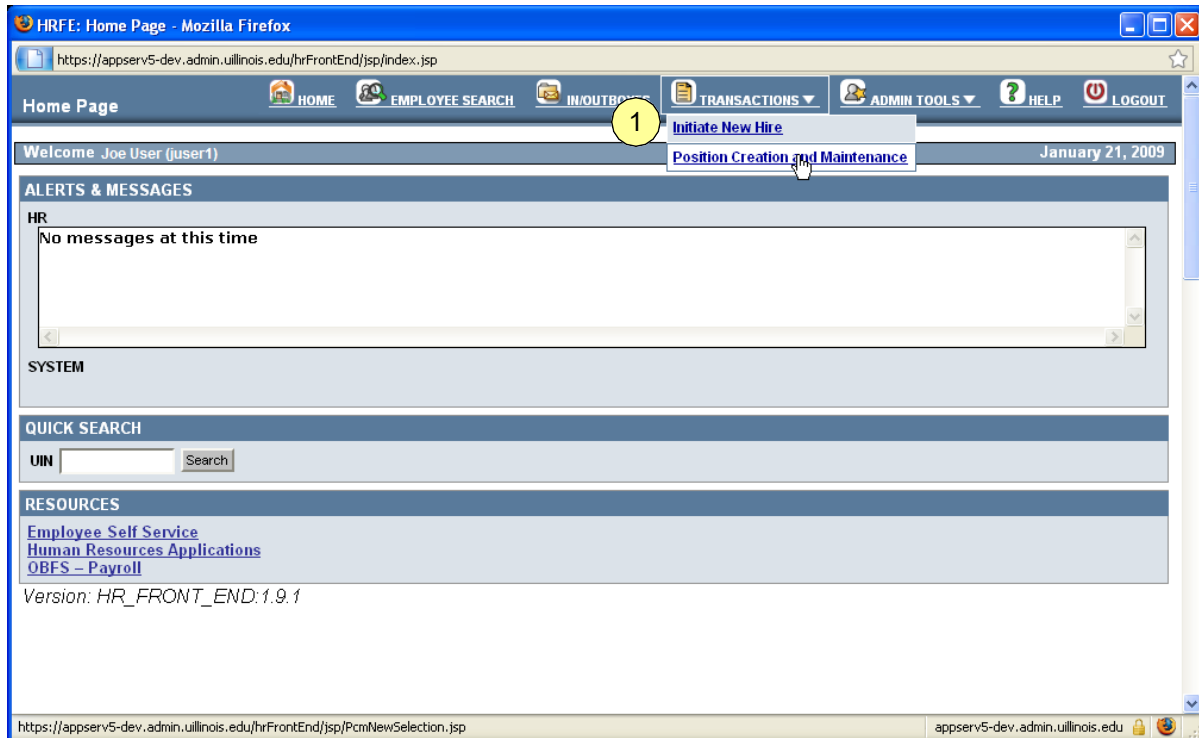
Indicates a **Warning** of an action that you should not perform or that might cause problems in the application.

## ***Performing Position Creation and Maintenance***

You can use the Position Creation and Maintenance transaction to create a new position or maintain an existing position. Follow these steps to complete a Position Creation and Maintenance transaction:

### ***Initiating Position Creation and Maintenance***

You can initiate a Position Creation and Maintenance transaction from the Home Page or Employee Record View of the HR Front End.



**Figure 1: HR Front End Home Page**

1. From the **Transactions** menu, select **Position Creation and Maintenance**.

*The **Position Selection** screen of the **Position Creation Wizard** appears.*



**HINT:** If you are maintaining a filled single position, it is quickest to begin an Employee Job Record Change directly from the **Employee Record View** of the incumbent.

## Selecting a Position

There are three options for selecting a position on the **Position Selection** screen (see Figure 2). The first two options allow you to maintain an existing position. Use the third option to create a new position. A new position should only be created when there is no acceptable position number to re- use (see Re-Using Positions vs. Creating New Positions).

- **Option 1 – I have a position number:** The Position Creation Wizard defaults to this option once opened. If you enter a known position number in this field, you are taken directly to the **Position Data** screen.
- **Option 2 – Search for a position:** If you choose to search for a position number, the Position Creation Wizard takes you through the **Position Search Results** screen first. The **Incumbent History** is only accessible from the **Position Search Results** screen.
- **Option 3 – Create new position:** If you have confirmed there is no existing position that you can re-used, you can also create a new position. This option takes you directly to the **Position Data** screen.

**Figure 2: Position Selection screen**

## ***Maintain an Existing Position and View Incumbent History***

There are two ways to select a position for maintenance – typing the position number or searching for the position. Only by searching for the position can you view the **Incumbent History**. The **Incumbent History** is a list of all employees who hold or have held the position.

**Figure 3: Entering a Position Number in the Position Selection screen**

2. If you know the position number and do not want to view incumbents, select **I have a position number**. Type the position number in the field and click **Continue**.

The **Position Data** screen appears. (see Figure 8).



**WARNING:** If you type the position number for a single position with an active incumbent an error message appears at the top of the **Position Selection** screen. The message instructs you to access the **Employee Record View** of the incumbent to edit the **Position Data** via an Employee Job Record Change.

**Figure 4: Searching for a position in the Position Selection screen**

3. If you do not know the position number, or if you know the position number, but wish to view incumbents, you can search for a position.
  - a. Select **Search for a position**. Select a value from the **COA** and **Budget Organization** lists.  
*The **Budget Organization** list filters to contain only organizations that are valid for the **COA** selected.*
  - b. Select as **Employee Group** from the list and click **Continue**.  
*The **Position Search Results** screen appears.*

**Figure 5: Position Search Results screen**



**NOTE:** Last Incumbent information is listed for single positions (**Type S**) only.

- c. To maintain a single filled position, click the incumbent’s name in the **Last Incumbent** column. Maintenance of single filled positions requires an Employee Job Record Change transaction.

*The incumbent’s **Employee Record View** displays.*



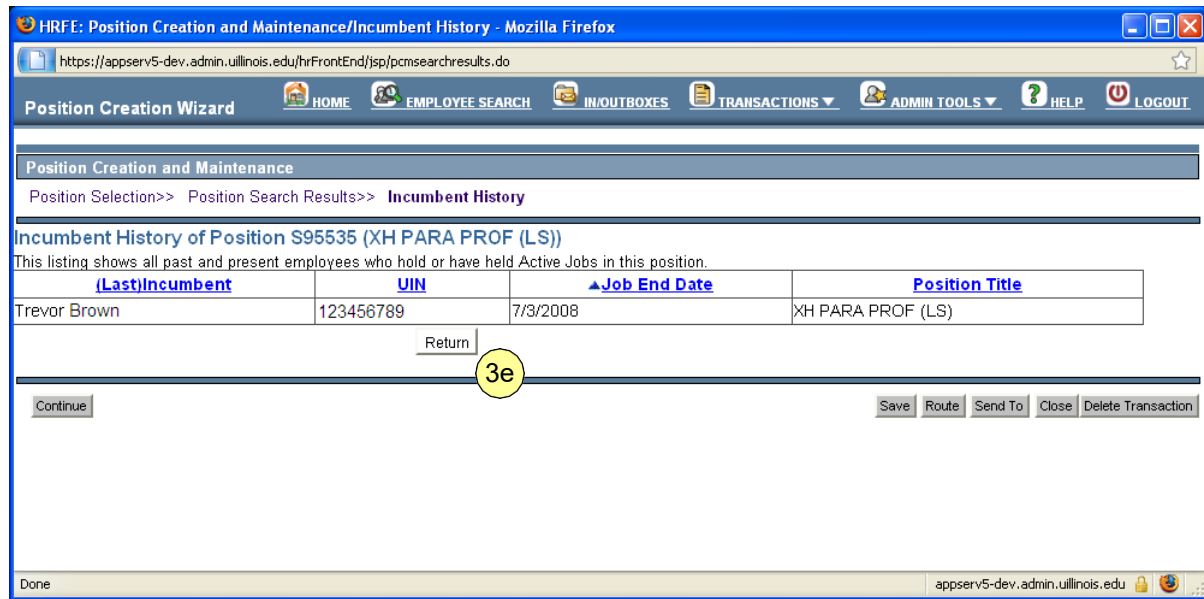
**WARNING:** If you navigate to the **Employee Record View** at this point, you will not be able to return to the **Position Search Results**. Use the incumbent link only if you intend to maintain a single filled position.



**HINT:** You can identify a single filled position by looking at the **Type** and **Job End Date** columns. A single filled position has **Type S**, and the **Job End Date** is either blank or in the future.

- d. If you want to view past and present incumbents for a position, highlight the row for that position and click **Incumbent History** below and to the right of the results table.

*The **Incumbent History** screen appears for the selected position.*

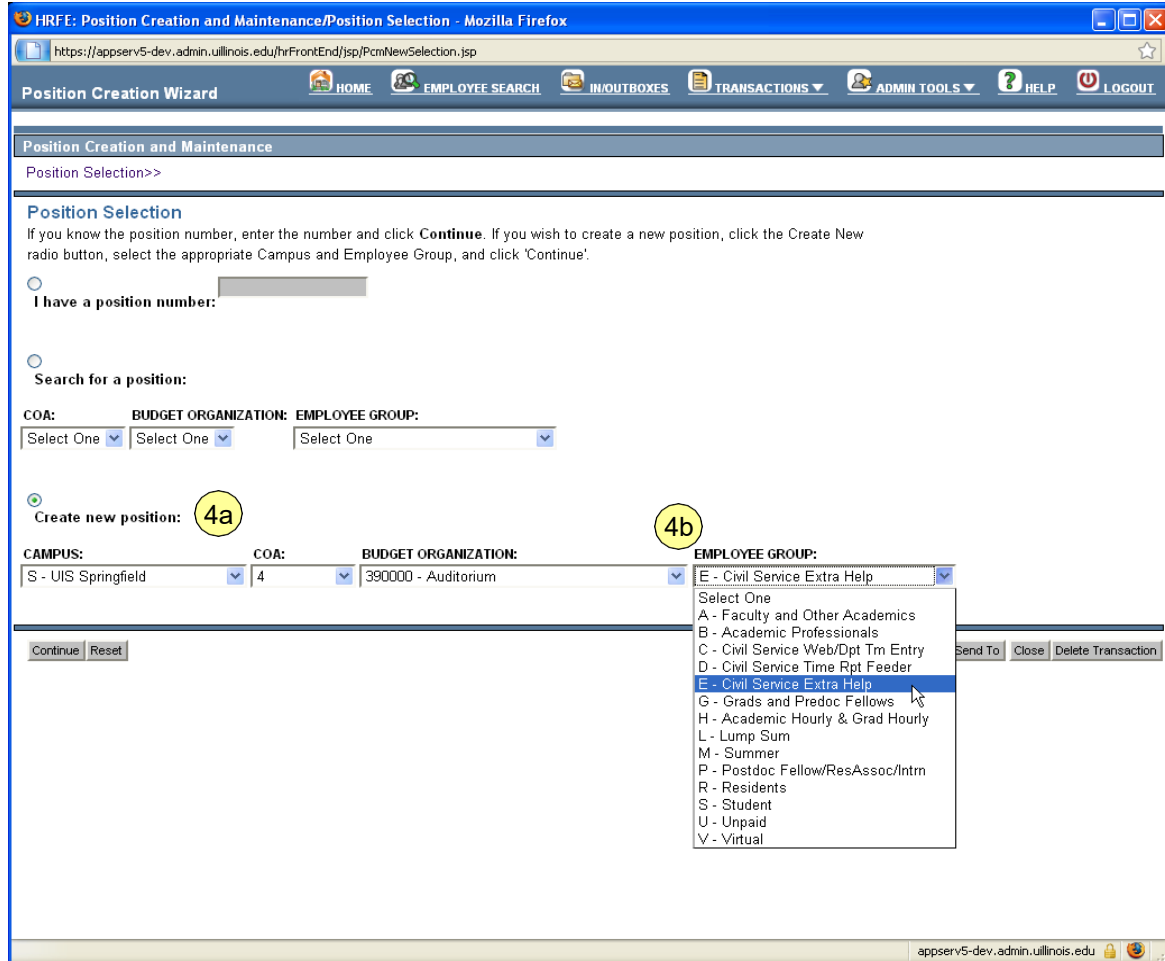


**Figure 6: Incumbent History screen**

- e. From the **Incumbent History**, click **Return** to return to the **Position Search Results** and complete position maintenance.  
*The **Position Search Results** screen reappears (see Figure 5).*
- f. Select the row that contains the position to be maintained and click **Continue**.  
*The **Position Data Screen** appears.*

## Creating a New Position

The third option on the **Position Selection** screen is **Create new position**. Before creating a new position, determine whether you can use a position that already exists. (See the Re-Using Positions vs. Creating New Positions section.)



**Figure 7: Creating a new position in the Position Selection screen**

4. If you need to create a new position:
  - a. Select **Create new position**. Choose the appropriate **Campus**, **COA**, and **Budget Organization** for the new position.  
*The **Budget Organization** list filters based on the **COA** selected.*
  - b. Select an **Employee Group** from the list and click **Continue**.  
*The **Position Data** screen appears. The **Position #** is automatically assigned by the HR Front End.*

## Editing Position Data

Whether you are creating a new position or maintaining an existing position, the final screen of the **Position Creation Wizard** is the **Position Data** screen. On this screen, you can view/edit information related to the position.

? HELP LOGOUT
**Position Creation Wizard**

---

Transaction #: -1 Position #: S95535  
 Position Selection>> Position Search Results>> Position Data

---

**Position Data**
Take Ownership Release Ownership Transaction History

Review the position data. Edit the fields as necessary.

**CHANGE DATE :** 1/22/2009

**POSITION END DATE:**

**POSITION # :** 895535

**POSITION CLASS :** 99962 - XH PARA PROF (LS)

**POSITION TITLE :** XH PARA PROF (LS)

**POSITION EMPLOYEE CLASS :** EH - CS Extra Help

**TYPE :** S - Single

**POSITION BEGIN DATE :** 11/16/2007

**PAPE# :** Blank - Blank

**SALARY GROUP:** 2009

**TABLE:** UC

**GRADE:** 9996

**STEP:**

**SALARY RANGE:**

LOW:	MIDPOINT:	HIGH:
10.33	10.33	35.0

**BARGAINING UNIT:** NONE

**PD PROB PERIOD:**

**ACCRUE SENIORITY:** N - No

**JOB PROGRESSION:** No Job Progression

**POSITION DESCRIPTORS:**

Blank Remove

ABDRS - Has Budget responsibility Add

**BUDGET PROFILE :** X - Not Budgeted

**BUDGET COA :** 4

**BUDGET ORG :** 390000 - Auditorium

**POSITION LABOR DISTRIBUTION**

Edit	Remove	COA	Index	Fund	Organization	Account	Program	Activity	Location	Percent	Update
		4		302592	390000	215920	390004			100.0	
<b>TOTALS</b>										<b>100.00</b>	

**COA :** 4 - University of Illinois - Springfield

**Index:**

**Fund :**

**Organization :**

**Account :**

**Program :**

**Activity:**

**Location:**

**Percent :**

Update LD Add LD

Required fields \*


Save Route Send To Close Delete Transaction

**Figure 8: Position Data screen**

- Type or select values for the position in the required fields (\*). If applicable, add or edit values in additional editable fields.



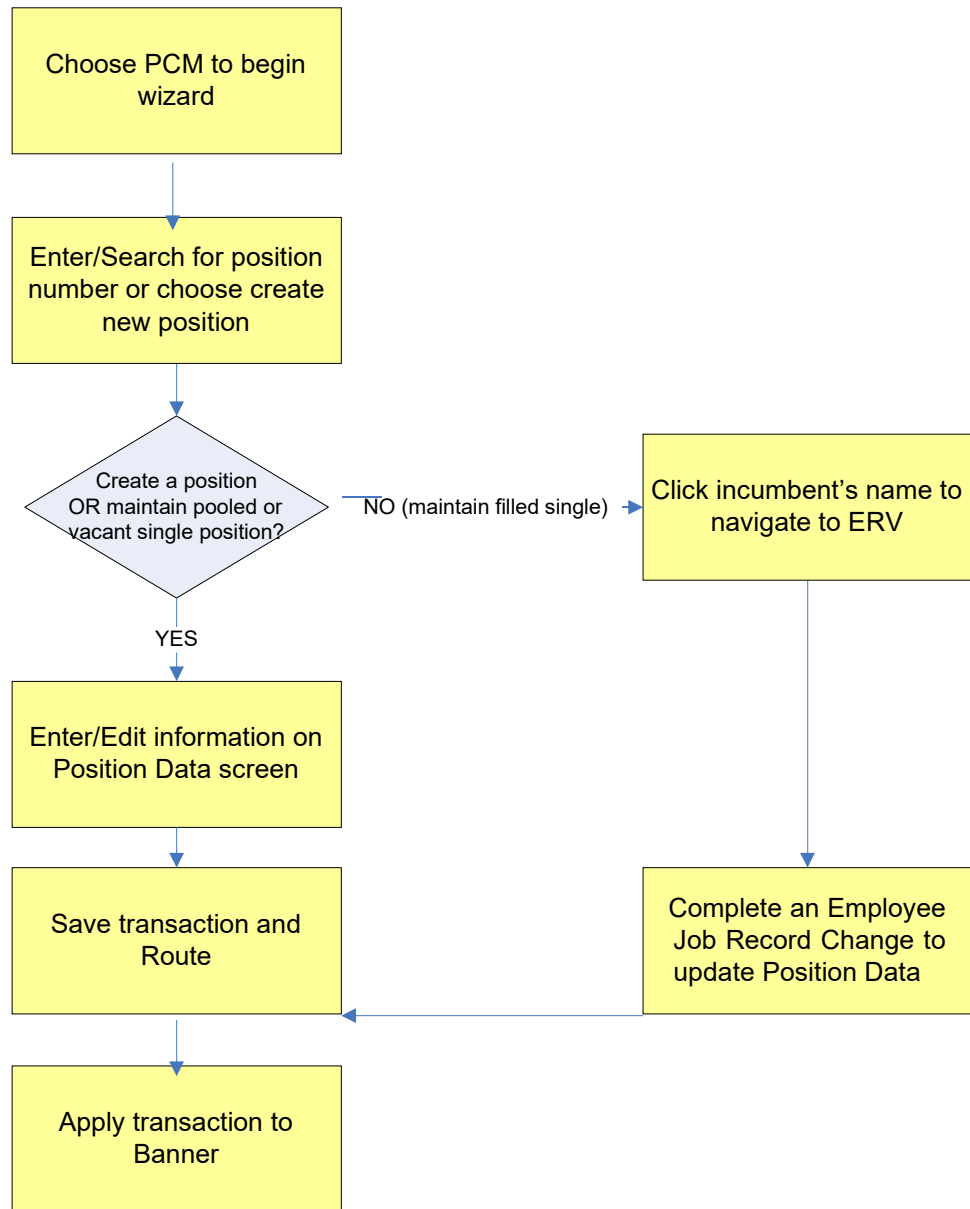
**HINT:** Information regarding the required fields is found in *Table 2: Required Position Data fields*. For more information on required and non-required fields, see Online Help. To access Online Help, click **Help** in the navigation bar at the top of the screen.

Field Name	Defaults and Allowed Values
Change Date	Defaults to today's date. If the change needs to be retroactive, change this value to the day the change should have taken effect. Future-dated position changes are not allowed.
Position Number	This value is automatically assigned by the HR Front End and is not editable.
Position Class	This list is filtered based on the employee group associated with the position.
Position Title	A default title may appear in this field depending on the employee group.
Position Employee Class	This value defaults based on the position class and is editable. The list is filtered based on <ul style="list-style-type: none"> <li>Employee Group selection on the Position Selection screen for new positions</li> <li>Employee Group already affiliated with the position for existing positions</li> </ul>
Position Type	This value defaults based on the employee group and is editable. Allowed values are Single or Pooled.
Position Begin Date	If you are maintaining an existing position, the original begin date defaults.
PAPE#	This field is required for positions with employee group B or Chicago HA positions. If required, choose a value from the list. If the position employee class does not require a PAPE number, this field will not be editable.
Budget Profile	For a new position, this value defaults based on the employee group. It is editable for all employee classes <i>except</i> E*, H*, LP, MM, and SA.
Budget COA	This value defaults for an existing position. The field is only editable when creating a new position.
Budget Org	This value defaults based on the Organization selected on the Position Selection screen. When creating a new position, this field is not editable.
Position Labor Distribution	<p>The required fields in this section are COA, Fund, Organization, Account, Program, and Percent. The Total of the Percent values for all labor distribution rows must equal 100. <b>Hint:</b></p>  <ul style="list-style-type: none"> <li>If an Index code exists for the account, this can be used to automatically fill in many of the required segments. You must type or select the Account code after entering the Index.</li> <li>It is appropriate to change the <b>Position Labor Distribution</b> when there has been a long-term change in funding for the position. If the <b>Organization</b> code in the labor distribution changes, it may also be necessary to change the <b>Budget Org</b>.</li> </ul>

**Table 2: Required Position Data fields**

Once you complete the **Position Data** screen, the transaction is ready to be routed and applied to Banner.

## Appendix A – Position Creation and Maintenance Process Flow



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## Appendix A: Screenshots from HRFE Video

The screenshot displays a video player interface for a course titled "Position Creation & Maintenance - HR Front End". The slide content includes:

- Top left: "< Course Menu"
- Top center: "Position Creation & Maintenance - HR Front End"
- Top right: "INTRO P. 1/4"
- Center text: "Welcome to the:  
**Position Creation and Maintenance**  
course"
- Bottom left: "< PREV"
- Bottom right: "NEXT >"
- Bottom center: "UNIVERSITY OF UTAH"
- Bottom right callout: "Click the **Next** button to continue."
- Bottom control bar: Includes play, stop, and volume icons, and the text "ADOBE CAPTIVATE™"

This course will help to equip you when working with Position Creation & Maintenance in the HR Front End Application.

CHAPTER	YOU WILL LEARN ABOUT
1 – Common Terminology	<ul style="list-style-type: none"><li>• Common Terminology</li><li>• What Position Creation &amp; Maintenance is</li><li>• Position Creation &amp; Maintenance Quick View</li></ul>
2 – Initiating a Position Creation & Maintenance Transaction	<ul style="list-style-type: none"><li>• How to select the Position Creation &amp; Maintenance transaction from the home screen</li><li>• About each option in the Position Creation and Maintenance Wizard</li></ul>
3 – Maintaining an Existing Position and Viewing Incumbent History	<ul style="list-style-type: none"><li>• How to search for a position</li><li>• How to view incumbent history</li><li>• How to maintain a position on the Position Data Screen</li><li>• How to Route</li></ul>
4 – Creating a New Position	<ul style="list-style-type: none"><li>• How to Create a New position with a new position number</li><li>• About the required fields</li><li>• How to Route</li></ul>
5 – Course Review	<ul style="list-style-type: none"><li>• You will participate in activities that will assess your understanding of the content covered in this course</li></ul>

Click the **Next** button to continue.

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## Appropriate Use and Security of Confidential and Sensitive Information



Users are responsible for any activity that occurs during their logon. The HR Front End Application allows users to access confidential and sensitive information. Guidelines have been created to help users manage their responsibility.

- Do NOT share passwords or store them in an unsecured manner
- Do NOT leave workstation unattended while logged on to administrative information systems
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- Retrieve printed reports quickly, and do not leave the reports lying around in plain view
- Secure reports containing confidential and sensitive information (e.g. FERPA, EEO, or HIPAA protected data)
- Shred the documents in a timely manner when disposing of reports containing confidential or sensitive information.

Click the **Next** button to continue.



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## Chapter 1

# Common Terminology

### In this Chapter, you will learn:

- Common Terminology
- What Position Creation & Maintenance is
- Position Creation & Maintenance Quick View

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Click the **Next** button to continue.




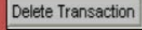
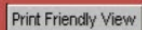



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### Position Creation & Maintenance - Button Functionality

BUTTON	FUNCTIONALITY
	The <b>Apply</b> feature completes the transaction and applies the data to Banner. The User must have <b>Apply</b> permissions for this button to be active
	The <b>Close</b> button enables the user to exit the transaction.
	The <b>Continue</b> button is used to proceed through the screens of a Wizard
	The <b>Delete Transaction</b> button is used to delete a transaction from the system.
	The <b>Print Friendly View</b> button opens a separate window that will align the data from the current screen in a format that can be easily printed.
	The <b>Route</b> feature sends the transaction on to the next stop in the predetermined routing for the transaction.
	The <b>Save</b> button is used to save the transaction to be worked on at a time in the future. Saved transactions can be accessed in the User's Inbox (My Inbox)
	The <b>Send To</b> feature allows the transaction to be sent to a user that is not in the predetermined routing for the transaction.

Click the **Next** button to continue.

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# What is Position Creation & Maintenance?

A Position Creation and Maintenance transaction in the HR Front End gives you the ability to create a new position or maintain an existing position. When you search for an existing position, you also have the opportunity to view the Incumbent History for the position.

- **Create a New Position:** When you select this option, the Position Creation and Maintenance Wizard leads you through a series of screens to create a new position.
- **Update an Existing Position and View Incumbent History:** You can access an existing position by either typing in the position number or by searching for the position. Searching for an existing position allows you to view the Incumbent History as part of the position maintenance process. The Incumbent History is a list of people who hold or have held the position.

Use the Position Creation and Maintenance Wizard only for maintenance of pooled or vacant single positions. If you select a filled single position for maintenance, you will be prompted to go to the incumbent's Employee Record View. From there you would complete the transaction as an Employee Job Record Change.

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# Budget Organization Transfers

In the HR Front End, budget organization transfers are processed as either Position Creation and Maintenance or Employee Job Record Change transactions, depending on the position. The guidelines are the same as those used for updating a position, since a budget organization transfer is a specific type of position maintenance. For pooled and vacant single positions, use Position Creation and Maintenance. For filled single positions use Employee Job Record Change.

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# Re-Using Positions vs. Creating New Positions

Before creating a new position, determine if there is an existing vacant position that can be re-used. Whether or not a vacant position can be re-used requires comparing the vacant position to the job that will be tied to that position. To help prevent the creation of unnecessary positions, you should re-use an existing vacant position when either of the following applies:

- The vacant position and the job have the same P-class, Title, Position Descriptors, etc.
- The vacant position and the job belong to the same employee group, even if the P-class, Title, Positions Descriptors, etc. do not match exactly. You have the option in the wizard to edit the P-class, Title, Position Descriptors, etc., of the position to match the job. For example, a unit might have a vacant position from a job that no one will hold in the foreseeable future. This position could be modified and used for a new employee performing a different job within the same employee group.

If neither of the above conditions applies, then the Unit or Central HR Office can create a new position, as appropriate.

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# Position Creation & Maintenance

Whether the Unit or a Central HR Office is responsible for position creation and maintenance depends on the employee group and campus policy. The table below summarizes who is responsible for position creation and maintenance. Your campus HR offices also can help you determine who is responsible for creating and maintaining positions.

Employee Group	Unit			Central HR Offices		
Permanent/Status Civil Service				UIUC	UIC	UIS
Extra Help, Clerical				UIUC	UIC	UIS
Extra Help, Non-Clerical	UIUC				UIC	UIS
Student (SA)				UIUC	UIC	UIS
Faculty and Other Academic	UIUC	UIC	UIS			
Academic Professional	UIUC	UIC				UIS
Unpaid	UIUC	UIC	UIS			
Graduate Assistant	UIUC	UIC				UIS
Hourly (Acad. or Grad.)	UIUC	UIC				UIS

Click the **Next** button to continue.

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## Position Creation & Maintenance Quick View

- 1 • Select Position Creation and Maintenance transaction.
- 2 • Complete the Position Selection screen.
- 3 • View the Incumbent History for an existing position.(if necessary).
- 4 • Complete the Position Data screen.
- 5 • Transaction Routed and Applied to Banner.

Click the **Next** button to continue.

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# Chapter 1 Review

## In this Chapter, you have learned:

- Common Terminology
- What Position Creation & Maintenance is
- Position Creation & Maintenance Quick View

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Chapter 2

# Initiating a Position Creation & Maintenance Transaction

**In this Chapter, you will learn:**

- How to select the Position Creation & Maintenance transaction from the home screen
- About each option in the Position Creation and Maintenance Wizard

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Course Menu **Position Creation & Maintenance - HR Front End** CH.2 P.2/4

Home Page HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

Welcome Anderson, Shannon (sandrsn) **Initiate New Hire** **Position Creation and Maintenance** November 30, 2009

ALERTS & MESSAGES

HR  
No messages at this time

SYSTEM

QUICK SEARCH  
UIN  Search

RESOURCES  
[Employee Self Service](#)  
[Human Resources Applications](#)  
[OBFS](#) [Payroll](#)

To initiate the transaction click **Position Creation and Maintenance** from the Transactions Menu.

You can initiate a Position Creation and Maintenance transaction from the Home Page or Employee Record View of the HR Front End.

< PREV NEXT >

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## Position Creation and Maintenance

Position Selection>>

### Position Selection

If you know the position number, enter the number and click **Continue**. If you wish to create a new position, click radio button, select the appropriate Campus and Employee Group, and click 'Continue'.

I have a position number:

Search for a position:

COA:  BUDGET ORGANIZATION:  EMPLOYEE GROUP:

Create new position:

CAMPUS:  COA:  BUDGET ORGANIZATION:  EMPLOYEE GROUP:

Click the **Next** button to continue.

< PREV

NEXT >



There are three options for selecting a position on the **Position Selection** screen. The first two options allow you to maintain an existing position. Use the third option to create a new position. A new position should only be created when there is no acceptable position number to re-use. Hover over each option to read more.

# Chapter 2 Review

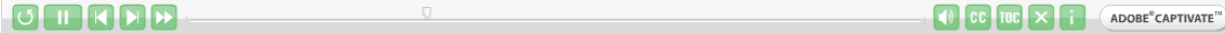
## In this Chapter, you have learned:

- How to select the Position Creation & Maintenance transaction from the home screen
- About each option in the Position Creation and Maintenance Wizard

Click the **Next** button to continue.

< PREV

NEXT >



Chapter 3

# Maintaining an Existing Position and Viewing Incumbent History

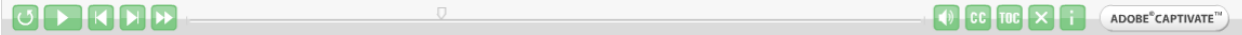
**In this Chapter, you will learn:**

- How to search for a position
- How to view incumbent history
- How to maintain a position on the Position Data Screen
- How to Route

Click the **Next** button to continue.

< PREV

NEXT >



## Position Creation Wizard

- HOME
- EMPLOYEE SEARCH
- IN/OUTBOXES
- TRANSACTIONS
- ADMIN TOOLS
- HELP
- LOGOUT

### Position Creation and Maintenance

Position Selection>>

#### Position Selection

If you know the position number, enter the number and click **Continue**. If you wish to create a new position, click the Create New radio button, select the appropriate Campus and Employee Group, and click 'Continue'.

I have a position number:

Search for a position:

COA:  BUDGET ORGANIZATION:  EMPLOYEE GROUP:

1  
2  
4  
7  
9

Select 2 from the Chart of Accounts dropdown menu.

There are two ways to select a position for maintenance - typing the position number or searching for the position. Only by searching for the position can you view the **Incumbent History**. The **Incumbent History** is a list of all employees who hold or have held the position. We are going to search for a position.

Continue Reset

Save Route Send To Close Delete Transaction

< PREV

NEXT >



## Position Creation Wizard

- HOME
- EMPLOYEE SEARCH
- IN/OUTBOXES
- TRANSACTIONS
- ADMIN TOOLS
- HELP
- LOGOUT

### Position Creation and Maintenance

Position Selection>>

#### Position Selection

If you know the position number, enter the number and click **Continue**. If you wish to create a new position, click the Create New radio button, select the appropriate Campus and Employee Group, and click 'Continue'.

I have a position number:

Search for a position:

COA:	BUDGET ORGANIZATION:	EMPLOYEE GROUP:
2	458000 - Chemistry	Select One

Create new p

CAMPUS: Select One

- 456013 - Children & Adoles Ct
- 456014 - Nutrition & Well Ctr
- 456015 - Psychiatry Center
- 456016 - Surgery Center
- 456017 - Oncology Center
- 456018 - Craniofacial & Maxillofacial Center
- 456019 - Stroke Institute
- 456020 - Bariatrics
- 456021 - Liver Cencer
- 456022 - Transplant Center - EEI
- 456023 - NeuroScience Center
- 456024 - Medicine Call Center
- 456025 - Primary Care Plus
- 457000 - Latin AM Cultural Ctr
- 458000 - Chemistry**
- 462000 - Biobehavioral Health Science
- 465000 - Grounds Maintenance
- 466000 - Support and General Services
- 466001 - Support Serv Adm
- 466002 - Patient Accounting

Buttons: Continue, Reset, Save, Route, Send To, Close, Delete Transaction

The Budget Organization list filters to contain only organizations that are valid for the COA selected. The list is also filtered based on your security permissions.

Select 458000 - Chemistry from the Budget Organization drop down menu.

< PREV

NEXT >

Course Menu **Position Creation & Maintenance - HR Front End** CH.3 P.4/12

Position Creation Wizard HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

Position Creation and Maintenance  
Position Selection>>

### Position Selection

If you know the position number, enter the number and click **Continue**. If you wish to create a new position, click the Create New radio button, select the appropriate Campus and Employee Group, and click 'Continue'.

I have a position number:

Search for a position:

COA:  BUDGET ORGANIZATION:  EMPLOYEE GROUP:

2  458000 - Chemistry  Select One

Create new position:

CAMPUS:  COA:  BUDGET ORGANIZATION:

Select One  Select One  Select One

< PREV NEXT >

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Select A- Faculty and Other Academics from the Employee Group drop down menu.

## Position Creation Wizard

- HOME
- EMPLOYEE SEARCH
- IN/OUTBOXES
- TRANSACTIONS
- ADMIN TOOLS
- HELP
- LOGOUT

### Position Creation and Maintenance

Position Selection>>

#### Position Selection

If you know the position number, enter the number and click **Continue**. If you wish to create a new position, click the Create New radio button, select the appropriate Campus and Employee Group, and click 'Continue'.

I have a position number:

Search for a position:

COA:  BUDGET ORGANIZATION:  EMPLOYEE GROUP:

Create new position:

CAMPUS:  BUDGET ORGANIZATION:  EMPLOYEE GROUP:

**Click Continue.**

< PREV

NEXT >



## Position Creation Wizard

- HOME
- EMPLOYEE SEARCH
- IN/OUTBOXES
- TRANSACTIONS
- ADMIN TOOLS
- HELP
- LOGOUT

### Position Creation and Maintenance

Position Selection >> **Position Search Results >>**

Table will display all positions that meet search criteria **except**:  
 Those with a Status of 'Closed'.  
 Those with a Position End Date present.

When you click Search, the system returns only exact matches to the Budget Org.  
 This list will not include positions with a position end dates.

Position	Position Title	P-Class	E-Class	Position Begin Date	Type	COA	Budget Org	Last Incumbent	Job End Date
C02364	Vstg Research Assoc. Prof	BCBGF - OTHAC 12MO ACPRO RSRCH VISTN	AL - Acad 12mth Ben Elig	8/3/2006	S	2 - University of Illinois - Chicago	458000	<a href="#">Alexey Andreev</a>	11/15/2006
C02411	Professor	BABAA - OTHAC 9MO ACPRO	AA - Acad 9/12mth Ben Elig	8/16/2005	S	2 - University of Illinois - Chicago	458000	<a href="#">Maria Varelas</a>	5/15/2006
C02412	LECTURER	BAEFA - OTHAC 9MO LCTUR CLNCL	AA - Acad 9/12mth Ben Elig	8/16/2005	S	2 - University of Illinois - Chicago	458000	<a href="#">Marlynn Nishimura</a>	8/15/2006
C02413	TENUR 9MO ASPRO	AACAA - TENUR 9MO ASPRO	AA - Acad 9/12mth Ben Elig	6/30/2006	S	2 - University of Illinois - Chicago	458000	<a href="#">Tom Driver</a>	
C02414	TENUR 9MO ASPRO	AACAA - TENUR 9MO ASPRO	AA - Acad 9/12mth Ben Elig	6/30/2006	S	2 - University of Illinois - Chicago	458000	<a href="#">Preston Snee</a>	
C02416	TENUR 9MO ASPRO	AACAA - TENUR 9MO ASPRO	AA - Acad 9/12mth Ben Elig	6/30/2006	S	2 - University of Illinois - Chicago	458000	<a href="#">Lawrence Miller</a>	
C02430	OTHAC <9mo LCTUR VISTN	BDEAF - OTHAC <9MO LCTUR VISTN	AF - Acad <9mth NonBen Elig	5/10/2006	S	2 - University of Illinois - Chicago	458000	<a href="#">Tana Witt</a>	5/15/2006

Continue

Save Route Send

Click the **Next** button to continue.

< PREV

NEXT >



## Position Creation Wizard

- HOME
- EMPLOYEE SEARCH
- IN/OUTBOXES
- TRANSACTIONS
- ADMIN TOOLS
- HELP
- LOGOUT

### Position Creation and Maintenance

Position Sel

Table will display  
Those with  
Those with

To maintain a single filled position, click the incumbent's name in the **Last Incumbent** column. Maintenance of single filled positions requires an Employee Job Record Change transaction.

**Last Incumbent** information is listed for single positions (**Type S**) only.

If you navigate to the **Employee Record View** at this point, you will not be able to return to the **Position Search Results**. Use the incumbent link only if you intend to maintain a single filled position.

You can identify a single filled position by looking at the **Type** and **Job End Date** columns. A single filled position has **Type S**, and the **Job End Date** is either blank or in the future.

If you want to view past and present incumbents for a position, highlight the row for that position and click **Incumbent History** below and to the right of the results table.

Position	COA	Budget Org	Last Incumbent	Job End Date
C02364	2 - University of Illinois - Chicago	458000	<a href="#">Alexey Andreev</a>	11/15/2006
C02411	2 - University of Illinois - Chicago	458000	<a href="#">Maria Varelas</a>	5/15/2006
C02412	2 - University of Illinois - Chicago	458000	<a href="#">Marlyvne Nishimura</a>	8/15/2006
C02413	2 - University of Illinois - Chicago	458000	<a href="#">Tom Driver</a>	
C02414	2 - University of Illinois - Chicago	458000		
C02416	2 - University of Illinois - Chicago	458000		
C02430	OTHAC <9mo LCTUR VISTN	BDEAF - OTHAC <9MO LCTUR VISTN	AF - Acad <9mth NonBen Elig	5/10/2006

Incumbent History

Continue

Save Route Send To Close Delete Transaction

< PREV

NEXT >



Position Creation Wizard



EMPLOYEE SEARCH



TRANSACTIONS



HELP



Position Creation and Maintenance

Position Selection >> Position Search Results >> **Incumbent History**

### Incumbent History of Position C02430 (OTHAC <9mo LCTUR VISTN)

This listing shows all past and present employees who hold or have held Active Jobs in this position.

<a href="#">(Last)Incumbent</a>	<a href="#">UIN</a>	<a href="#">Job End Date</a>	<a href="#">Position Title</a>
Michael Davis	670014864	7/15/2006	OTHAC <9mo LCTUR VISTN
Douglas Kalvin	653248231	8/15/2008	OTHAC <9mo LCTUR VISTN
Tana Witt	652645397	5/15/2009	OTHAC <9mo LCTUR VISTN

**Return**

Continue

Click **Return** to return to the **Position Search Results**.

Save Route Send To Close Delete Transaction

Here you can view the list of incumbents, the UIN, the Job End Date, and the Position Title.

< PREV

NEXT >



## Position Creation Wizard

- HOME
- EMPLOYEE SEARCH
- IN/OUTBOXES
- TRANSACTIONS
- ADMIN TOOLS
- HELP
- LOGOUT

### Position Creation and Maintenance

Position Selection >> **Position Search Results >>**

Table will display all positions that meet search criteria **except**:  
 Those with a Status of 'Closed'.  
 Those with a Position End Date present.

Position	Position Title	P-Class	E-Class	Position Begin Date	Type	COA	Budget Org	Last Incumbent	Job End Date
76378	VST RES ASST PROF	BCCGF - OTHAC 12MO ASPRO R5RCH VISTN	AL - Acad 12mth Ben Elig	7/1/2003	S	2 - University of Illinois - Chicago	458000	<a href="#">Richard Pariza</a>	1/31/2010
76615	Visiting Lecturer	BACAF - OTHAC 9MO ASPRO VISTN	AA - Acad 9/12mth Ben Elig	7/1/2003	S	2 - University of Illinois - Chicago	458000	<a href="#">Neil Miranda</a>	2/21/2006
76891	TENUR 9MO ACPRO	AABAA - TENUR 9MO ACPRO	AA - Acad 9/12mth Ben Elig	7/1/2003	S	2 - University of Illinois - Chicago	458000	<a href="#">Robert Standaert</a>	8/15/2005
77017	TENUR 9MO PROFS	AAAAA - TENUR 9MO PROFS	AA - Acad 9/12mth Ben Elig	7/1/2003					
77186	Prof Emeritus	BAAAG - OTHAC 9MO PROFS EMRTS	AF - Acad <9mth NonBen Elig	7/1/2003					5/15/2008
77215	TENUR 9MO ASPRO	AACAA - TENUR 9MO ASPRO	AA - Acad 9/12mth Ben Elig	7/1/2003					8/15/2006
77548	TENUR 9MO ACPRO	AABAA - TENUR 9MO ACPRO	AA - Acad 9/12mth Ben Elig	7/1/2003	S	2 - University of Illinois - Chicago	458000	<a href="#">Duncan Wardrop</a>	

To maintain a position highlight the row of a single vacant position or a pooled position.

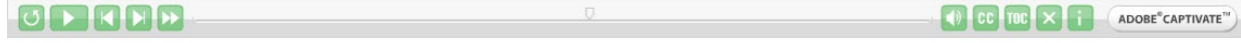
Click **Continue**.

Continue

Save Route Send To Close Delete Transaction

< PREV

NEXT >



## Position Creation Wizard

HELP LOGOUT

Transaction #: -1 Position #: C76615 New Transaction=PCM  
Position Selection>> Position Search Results>> Position Data

### Position Data

Take Ownership Release Ownership Transaction History

Review the position data

You have now entered the **Position Data** screen. You will be able to make changes to necessary fields.

CHANGE DATE: 2/22/2006

POS

POSITION #: C76615

POSITION

BACAF - UTHAC 9MO ASPRO VISTN

POSITION TITLE: Visiting Lecturer

POSITION EMPLOYEE CLASS: AA - Acad 9/12mth Ben Elig

TYPE: S - Single

POSITION BEGIN DATE: 7/1/2003

PAPE#: Blank - Blank

SALARY

GROUP: 2010 TABLE: AA GRADE: UNDFD STEP: 0

SALARY RANGE

LOW: 1.0 MIDPOINT: 1.0 HIGH: 999999.0

BARGAINING UNIT: NONE

PD PROB PERIOD:

ACC RUE SENIORITY: N - No

JOB PROGRESSION: No Job Progression

POSITION DESCRIPTORS:

Blank Remove

ABDRS - Has Budget responsibility Add

Click the **Next** button to continue.

< PREV

NEXT >

POSITION DESCRIPTORS:

Blank

ABDRS - Has Budget responsibility

BUDGET PROFILE:  BUDGET COA:  BUDGET ORG:

POSITION LABOR DISTRIBUTION											
		COA	Index	Fund	Organization	Account	Program	Activity	Location	Percent	
<input type="button" value="Edit"/>	<input type="button" value="Remove"/>	2		497518	458000	211400	191100			100.0	<input type="button" value="Update"/>
<b>TOTALS</b>										<b>100.00</b>	

COA:

Index:

Fund:

Organization:

Account:

Program:

Activity:

Location:

Percent:

Once necessary changes have been made, click **Route**.

Required fields \*

< PREV

NEXT >

## Position Creation Wizard



• Success routing to ORG:Default:Apply A C-2-FT-458-458000 (89977:492964).

Transaction #: 89977 Position #: C76615  
458.458000 (89977:492964)

Position Selection>> Position Search Results

### Position Data

Review the position data. Edit the fields

CHANGE DATE : 02/22/2006  
POSITION END DATE :

POSITION # :	POSITION CLASS :	POSITION EMPLOYEE CLASS :
C76615	BABBA - OTHAC 9MO ACPRO EXTNS BACAF - OTHAC 9MO ASPRO VISTN	VISITING LECTURER Visiting Lecturer
		AA - Acad 9/12mth Ben Elig

TYPE : S - Single  
POSITION BEGIN DATE : 7/1/2003  
PAPE# : Blank - Blank

Once the transaction has been routed you will get a success routing message. Position Creation & Maintenance Transactions can be direct apply so if you have the Take Ownership button, take ownership and apply.

Take Ownership Release Ownership Transaction History

Click the **Next** button to continue.

< PREV

NEXT >



# Chapter 3 Review

## In this Chapter, you have learned:

- How to search for a position
- How to view incumbent history
- How to maintain a position on the Position Data Screen
- How to Route

Click the **Next** button to continue.

< PREV

NEXT >



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## Chapter 4

# Creating a New Position

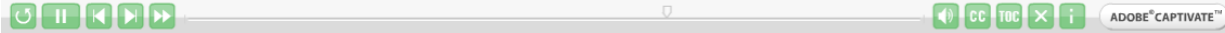
### In this Chapter, you will learn:

- How to Create a New position with a new position number
- About the required fields
- How to Route

Click the **Next** button to continue.

< PREV

NEXT >



## Position Creation and Maintenance

Position Selection>>

### Position Selection

If you know the position number, enter the number and click **Continue**. If you wish to create a new position, click the Create New radio button, select the appropriate Campus and Employee Group, and click 'Continue'.

The third option on the **Position Selection** screen is **Create new position**.

I have a position number:

Search for a position:

COA:  BUDGET ORGANIZATION:  EMPLOYEE GROUP:

Create new position:

CAMPUS:  GROUP:

- S - UIS Springfield
- Select One
- C - UIC Chicago
- G - UIGC Global
- S - UIS Springfield**
- U - UIUC Urbana / Champaign

Select **S-UIS** from the Campus drop down menu.

Save Route Send To Close Delete Transaction

< PREV

NEXT >

Course Menu **Position Creation & Maintenance - HR Front End** CH.4 P.3/12

Position Creation Wizard HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

Position Creation and Maintenance  
Position Selection>>

**Position Selection**  
If you know the position number, enter the number and click **Continue**. If you wish to create a new position, click the Create New radio button, select the appropriate Campus and Employee Group, and click 'Continue'.

I have a position number:

Search for a position:

COA:  BUDGET ORGANIZATION:  EMPLOYEE GROUP:

Create new position:

CAMPUS:  COA:  BUDGET ORGANIZATION:  EMPLOYEE GROUP:

S - UIS Springfield

Continue Reset  Save Route Send To Close Delete Transaction

Select One  
Select One  
1  
2  
4  
7  
9

Select 4 from the Chart of Accounts drop down menu.

< PREV NEXT >

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Course Menu **Position Creation & Maintenance - HR Front End** CH.4 P.4/12

Position Creation Wizard HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

Position Creation and Maintenance

Position Selection>>

**Position Selection**

If you know the position number, enter the number in the text box. If you do not know the position number, click the New radio button, select the appropriate Campus and Budget Organization, and click the Search button.

I have a position number:

Search for a position:

COA:  BUDGET ORGANIZATION:  EMPLOYEE GROUP:

Create new position:

CAMPUS:  COA:  EMPLOYEE GROUP:

620000 - Student Services  
 626001 - Student Volunteer and Service  
 626002 - Office of Disability Services  
 629000 - Lib Studies Colloquium Courses  
 635000 - Public Affairs Reporting  
 642000 - Music Courses  
 652000 - Building Maintenance  
 654000 - Campus Relations  
 655000 - TV Office  
 657000 - Legislative Studies  
 660000 - Health Services  
 670000 - Legal Studies  
 674000 - International Student Services  
 676000 - Radio Station WUIS  
 678000 - Office of the Chancellor  
 694000 - Teacher Education  
 696000 - Computer Science  
 703000 - Astronomy-Physics  
 714000 - Human Services  
 726000 - LAS Special Programs  
 730000 - Student Center

Continue Reset Save Route Send To Close Delete Transaction

< PREV NEXT >

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The Budget Organization list filters to contain only organizations that are valid for the COA selected. The list is also filtered based on your security permissions.

Select 660000- Health Services from the Budget Organization drop down menu.

Course Menu **Position Creation & Maintenance - HR Front End** CH.4 P.5/12

Position Creation Wizard HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

Position Creation and Maintenance  
Position Selection>>

**Position Selection**  
If you know the position number, enter the number and click **Continue**. If you wish to create a new position, click the Create New radio button, select the appropriate Campus and Employee Group, and click 'Continue'.

I have a position number:

Search for a position:  
COA:  BUDGET ORGANIZATION:  EMPLOYEE GROUP:

Create new position:  
CAMPUS:  COA:  EMPLOYEE GROUP:

**Select B- Academic Professionals from the Employee Group drop down menu.**

Close Delete Transaction

< PREV 

HR Front End Training

## Position Creation Wizard

- HOME
- EMPLOYEE SEARCH
- IN/OUTBOXES
- TRANSACTIONS
- ADMIN TOOLS
- HELP
- LOGOUT

### Position Creation and Maintenance

Position Selection>>

#### Position Selection

If you know the position number, enter the number and click **Continue**. If you wish to create a new position, click the Create New radio button, select the appropriate Campus and Employee Group, and click 'Continue'.

I have a position number:

Search for a position:

COA:  BUDGET ORGANIZATION:  EMPLOYEE GROUP:

Create new position:

CAMPUS:   BUDGET ORGANIZATION:  EMPLOYEE GROUP:

< PREV

NEXT >

Navigation icons: Refresh, Play, Stop, Previous, Next, Home, CC, TOC, X, i, ADOBE CAPTIVATE™

## Position Creation Wizard

HELP LOGOUT

Transaction #: -1 Position #: SA0335 New Transaction=PCM  
Position Selection>> Position Data

Type or select values for the position in the required fields (\*). If applicable, add or edit values in additional editable fields.

### Position Data

Review  
Notice that the system automatically generates a new position number for you.

CHANG  
11/30/

POSITION #: SA0335 POSITION CLASS: Select One POSITION TITLE: POSITION EMPLOYEE CLASS: BA - Acad/Pro 12mth Ben Elig

TYPE: S - Single POSITION BEGIN DATE: PAPER#: Blank - Blank

SALARY GROUP: TABLE: NONE - NONE GRADE: NONE - NONE STEP: SALARY RANGE LOW: MIDPOINT: HIGH:

BARGAINING UNIT: NONE PD PROB PERIOD: ACCRUE SENIORITY: N - No JOB PROGRESSION:

Click the **Next** button to continue.

< PREV

NEXT >

## Information Regarding the Required Fields

Field Name	Defaults and Allowed Values
Change Date	Defaults to today's date. If the change needs to be retroactive, change this value to the day the change should have taken effect. Future-dated position changes are not allowed.
Position Number	This value is automatically assigned by the HR Front End and is not editable.
Position Class	This list is filtered based on the employee group associated with the position.
Position Title	A default title may appear in this field depending on the employee group.
Position Employee Class	This value defaults based on the position class and is editable. The list is filtered based on <ul style="list-style-type: none"><li>• Employee Group selection on the Position Selection screen for new positions</li><li>• Employee Group already affiliated with the position for existing positions</li></ul>
Position Type	This value defaults based on the employee group and is editable. Allowed values are Single or Pooled.
Position Begin Date	If you are maintaining an existing position, the original begin date defaults.

Click the **Next** button to continue.


< PREV

NEXT >



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## Information Regarding the Required Fields

Field Name	Defaults and Allowed Values
PAPE#	This field is required for positions with employee group B or Chicago HA positions. If required, choose a value from the list. If the position employee class does not require a PAPE number, this field will not be editable.
Budget Profile	For a new position, this value defaults based on the employee group. It is editable for all employee classes except E*, H*, LP, MM, and SA.
Budget COA	This value defaults for an existing position. The field is only editable when creating a new position.
Budget Org	This value defaults based on the Organization selected on the Position Selection screen. When creating a new position, this field is not editable.
Position Labor Distribution	<p>The required fields in this section are COA, Fund, Organization, Account, Program, and Percent. The Total of the Percent values for all labor distribution rows must equal 100.</p> <p> <b>HINT:</b></p> <ul style="list-style-type: none"><li>• If an Index code exists for the account, this can be used to automatically fill in many of the required segments. You must type or select the Account code after entering the Index.</li><li>• It is appropriate to change the <b>Position Labor Distribution</b> when there has been a long-term change in funding for the position. If the <b>Organization</b> code in the labor distribution changes, it may also be necessary to change the <b>Budget Org</b>.</li></ul>

Click the **Next** button to continue.

< PREV

NEXT >



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BUDGET PROFILE :  BUDGET COA :  BUDGET ORG :

POSITION LABOR DISTRIBUTION												
		COA	Index	Fund	Organization	Account	Program	Activity	Location	Percent		
<input type="button" value="Edit"/>	<input type="button" value="Remove"/>	4		200100	660000	211100	209003			100	<input type="button" value="Update"/>	
										TOTALS	100.00	

COA :

Index:

Fund :

Organization :

Account :

Program :

Activity:

Location:

Percent :

Once the required fields have been filled out, click **Route**.

Required fields \*

< PREV

NEXT >

## Position Creation Wizard

HELP LOGOUT

• Success routing to CAMPUS:Default:Apply B S-4 (89980:492971).

Transaction #: 89980 Position (189728):Owner=No (None):Not Completed:, Stop:  
CAMPUS:Default:Apply B S-4  
Position Selection>> Position I

### Position Data

Review the position data. Edit

Take Ownership Release Ownership Transaction History

CHANGE DATE :  
11/30/2009

POSITION

POSITION # :  
SA0336

POSITION CLASS :  
RAGAA - COOR

POSITION TITLE :

COORDINATOR

POSITION EMPLOYEE CLASS :

BA - Acad/Pro 12mth Ben Elig

TYPE :

S - Single

POSITION BEGIN DATE :

11/1/2009

PAPE# :

49919 - COORDINATOR

Blank - Blank

SALARY

GROUP:

2010

TABLE:

AA

GRADE:

UNDFD

STEP:

0

SALARY RANGE

LOW:

1.0

MIDPOINT:

1.0

HIGH:

999999.0

BARGAINING UNIT:

NONE

PD PROB PERIOD:

ACCUE SENIORITY:

N - No

JOB PROGRESSION:

No Job Progression

Once the transaction has been routed you will get a success routing message. Position Creation & Maintenance Transactions can be direct apply so if you have the Take Ownership button, take ownership and apply.

Click the **Next** button to continue.

< PREV

NEXT >



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# Chapter 4 Review

## In this Chapter, you have learned:

- How to Create a New position with a new position number
- About the required fields
- How to Route

Click the **Next** button to continue.

< PREV

NEXT >

