Creating a Position – Position Management

- Login [https://job.montana.edu/hr](https://job.montana.edu/hr)
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_For issues with navigating ATS please refer to Navigation Manual_

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This is the backbone of the system and should be loaded with as much of the position description and Banner information as possible, since this area is the driving force behind the final hiring proposals.
CREATE A NEW POSITION DESCRIPTION

- When you first log on, the Applicant Tracking System (ATS) (blue) first appears.
- In the upper right corner, select Position Management (PM) (orange)

Roles that have the authority to create a position:
- Originator
- Hiring Authority
- HR Rep
- Human Resources

Ensure you are logged in as the appropriate role
Click the drop down arrow to select the appropriate role, screen will automatically refresh with the new role view.
DO NOT START A NEW POSITION FROM THE HOMEPAGE, Homepage link is for starting a posting.

Click on Position Descriptions and select “Staff”
To create a new position description, click on the “Create New Position Description” button
This message box will appear:

- Click on “New Position Description”

Enter the **Working Title**
- The three fields under the *Organizational Unit* section are **required** fields; the field cannot be left as “Please Select”; you will receive an error message and will not be able to advance to the next step
- **Location** – click the drop down and make a selection

**Division** – click on the drop down and make a selection

**Department** – click on the drop down and make a selection
MONTANA STATE UNIVERSITY APPLICANT TRACKING SYSTEM (ATS) POSITION MANAGEMENT MODULE

- Click on “Start Position Request”
If this is a position that has a Classification (positions that have same core duties – i.e. – Administrative Associate I, II, III and IV, Program Coordinator I and II, etc.), please select the appropriate classification by following these steps:
  
  - Select by clicking the circle by the Classification Job Title
  - Click Next

If there is not a Classification for this position and there should be a classification, please contact your HR Officer comp-classification@montana.edu to add the classification to the system.

If there is not a Classification for this position or classification is unknown, click Next

Note: the system indicates at all times what step you are at in these two areas.

To search for a position, click “Filter these results”
The following box will appear

- Enter the title to search for
- Click Search

Select by clicking the circle by the Classification Job Title
- Click Next
- If there is not a Classification for this position, click Next
POSITION JUSTIFICATION

- Enter the Justification of Need (this is a required field). This is the explanation that the Hiring Authority and eventually the Provost, Vice President and/or President will view prior to approving.

- Note: please be detailed in the Justification. Examples:
  - Employee Name retired/resigned; request to refill vacancy.
  - Creation of new position. New position has been approved by xxxx for Fiscal Year xxxx.

- Proposed Salary Range is pertains to professional positions to aid in classification, classified positions can be left blank.

- Click Next
# FORMATTING SHORTCUTS

For Posting

<table>
<thead>
<tr>
<th>Syntax</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>p.(space)text</td>
<td>This is a spaced paragraph</td>
</tr>
<tr>
<td><em>text</em></td>
<td><strong>Bold Text</strong></td>
</tr>
<tr>
<td>*(space)text</td>
<td>Bullet added to this line, repeat for each line needing a bulleted list</td>
</tr>
<tr>
<td>#(space)text</td>
<td>Number added to this line, repeat for each line needing a numbered list</td>
</tr>
<tr>
<td>***(space)text</td>
<td>Bulleted list inside another bulleted or numbered list</td>
</tr>
<tr>
<td>###(space)text</td>
<td>Numbered list within another numbered or bulleted list</td>
</tr>
<tr>
<td><em>text</em></td>
<td><em>Italic text</em></td>
</tr>
<tr>
<td>(R)</td>
<td>Registered Trademark symbol</td>
</tr>
</tbody>
</table>

| Extra Return      | Stops numbered or bulleted lists                                            |
| Contact info for email hyperlink for Field | XXXXX at 406-994-XXXX or <a href="mailto:xxxxxx@montana.edu">xxxxxxx@montana.edu</a> |

| Equivalency Statement | # A Bachelor’s degree or <b><i>an equivalent combination of education and/or experience.</b></i> |
| MT DL language (Position Special Requirements/Additional Information) | Must possess currently or be eligible to obtain a valid State of Montana Driver’s license and have an acceptable driving record (less than 12 points). |
| Physical Demands    | To perform this job successfully, an individual must be able to perform each essential duty satisfactorily with or without reasonable accommodations. The requirements listed above are representative of the knowledge, skill, and/or ability required. |

| Position Special Requirements/Additional Information | This job description should not be construed as an exhaustive statement of duties, responsibilities or requirements, but a general description of the job. Nothing contained herein restricts Montana State University’s rights to assign or reassign duties and responsibilities to this job at any time. |

For Special Requirements Field &lt;_&gt; starts command &lt;/_&gt; ends command

&lt;b&gt;&lt;/b&gt; Creates bold text
&lt;i&gt;&lt;/i&gt; Creates italic text
&lt;p&gt;&lt;/p&gt; Creates a new paragraph
&lt;p align="left"&gt; Aligns a paragraph to the left (default), right, or center.
&lt;br&gt; Inserts a line break
&lt;blockquote&gt;&lt;/blockquote&gt; Indents text from both sides
&lt;ol&gt;&lt;/ol&gt; Creates a numbered list
&lt;ul&gt;&lt;/ul&gt; Creates a bulleted list
&lt;li&gt;&lt;/li&gt; Precedes each list item, and adds a number or symbol depending upon the type of list selected
POSITION DETAILS

- If a Classification was selected, this information will pre-populate from the Classification tool. If a Classification was not available for this position, this information will be blank. These fields are closed and cannot be edited.

- The Working Title will pre-populate from the your entry at the beginning; you are able to edit if necessary.

- If you want a brief explanation to appear to the applicant when they first see the position when searching for positions at MSU, enter the information in the Brief Position Overview.

- According to University Communications, this should be 23 words or less (400 characters or less) and describe WWIFM ("What’s In It For Me?" as it relates to what’s in it for the candidate; why should they apply?)

- Recommendation – make this language exciting so the viewer wants to see more and apply!
Click on the drop down menu for **Appointment Type** and select the appropriate option.

**Position Number**

Enter the **Position Number**, if known. If this is a new position, HR will classify the position and create the position number in Banner and enter it once the position has been created.

- **4M** indicates Classified Salary (reports only exception hours)
- **4N** indicates Classified Hourly (reports everyday exact hours)

Click on the drop down menu for **Contract Term** and select the appropriate option.

- **Semester**
  - Fiscal Year
  - Academic Year
  - Summer
  - Other
If the Contract Term is Semester, please indicate which semester.
If the Contract Term is Other, please specify the From Date and the End Date
Enter the FTE

- **General Statement**
  Summarize the purpose of the position and the department.

- **Duties and Responsibilities**

- **Required Qualifications**
  - Experience, Education, Knowledge & Skills
  "Required qualifications" refers to the minimum and "must have" education and experience standards for an applicant to be considered.

- **Preferred Qualifications**
  - Experience, Education, Knowledge & Skills
  "Preferred qualifications" refers to standards that will improve an employee's ability to perform the duties and responsibilities of the position and enhance their performance.

- Enter the **General Statement** from the Job Description (if it exists); otherwise create the General Statement.
- Enter the **Duties and Responsibilities**
- Enter the **Required Qualifications** *(minimum requirement to successfully do the job)*
- If appropriate, enter any **Preferred Qualifications** (leave blank if none)
The Successful Candidate Will – enter the desired information into this section (see instructions below the box)

If appropriate, enter any Special Requirements

Enter the Physical Demands (required field)
  o HR will assist with the Physical Demands section

Click in the Originator box and select the appropriate person who will serve as the Originator for this action, if more than one is working on this there can be more than one that can be added.

Click in the Hiring Authority box and select the appropriate person who will serve as the Hiring Authority for this action.

Note: if the employee who will serve in the roles of Originator or Hiring Authority are not in the drop down list, please contact your HR Officer. Your HR Officer will update these employees’ user roles in the system. The system may take up to ten minutes to update before the employees show as an option in the Originator and/or Hiring Authority fields.
The Classification Tool is a tool to assist the department in developing the essential duties of the position, if needed. This is a tool ONLY; the applicant will not see this information.

- **Note:** This tool is used when a new position is created or an existing position is being modified significantly. Your HR Officer can assist you with this section.

- If you choose to utilize this tool, enter each duty/responsibility
- Click the drop down menu for **Duty Type**, and select the appropriate option (Primary or Secondary)
- Enter the average amount of time spend on this duty
- To add additional duties and responsibilities, click on the “Add Duties and Responsibilities Entry” button
- The percentage of time for all duties combined must equal 100%. The system does not calculate the total percentage of time.
Z-Org – enter the Z-Org number that this position reports to (if needed contact your payroll clerk)
  - Note: The majority of the time, the Z-Org will begin with a “Z”; please use a capital “Z”.

Time Entry – click on the drop down menu for Time Entry and select the appropriate method
  - Departmental
  - Web Time Entry
  - Payroll Time Entry

Supervisory Duties – click on the drop down menu to indicate No or Yes if this position has supervisory duties.

If Yes, enter the information regarding the positions that this position supervises (# of FTE and PTE the position supervises).

Click Next
LABOR DISTRIBUTION

- Add the Labor Distribution information by clicking on the Add Labor Distribution Entry button.

- Enter the Index number.
- Enter the Account Number.
- Enter the % of distribution (all entries must equal 100%).
- If there is a split distribution, click on the Add Labor Distribution Entry to add as many entries as needed to equal 100% (the system does not calculate the total labor distribution).
- Enter the ORG.
- Click Next.
INTERNAL POSITION DOCUMENTS

- This allows the ability to attach any documents that are pertinent to this request (ie. – organizational chart, emails, any other documents). **The applicant will NOT see these documents.**
- To upload an organizational chart, hover on the down arrow by the word “Actions”, select:
  - Upload New
  - Create New
  - Choose Existing
  - Add by URL

Upload New:

- Name – will pre-populate; you are able to edit
- Description – enter a brief description
- Click on Choose File to upload from your computer
- Click Submit
Create New:

- Name – will pre-populate; you are able to edit
- Description – enter a brief description
- Enter the desired information in the text area
- Click Submit

Choose Existing:

- Select an existing document to upload by clicking the circle by the document
- Click Submit
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Add by URL:

- Name – will pre-populate; you are able to edit
- Description – enter a brief description
- Enter the URL address
- Click Submit

Once an option has been submitted (message confirmation in green bar):

- “Additional Document” – this provides the ability to attach any other documents that should be included for this request (ie – emails, additional notes, etc.)
- Click Next
This is currently not required
Select what position supervises the position you are requesting; click the circle next to the appropriate Working Title

Note: The supervisor position may not be listed as the system is new; if the appropriate supervisor position is not listed at this time, click next without selecting a position. Eventually, when all of the job descriptions are added to the system, the supervisory positions will be listed and can be added to the job description at a future date.

Click Next
SUMMARY

The Summary allows you to review all of the entered information; you have the ability to edit any section by clicking on the Edit link to any of the sections.

The blue circle with a check mark indicates the section contains all of the required information.

The orange circle with an exclamation mark indicates additional information is required in that section.

Click Edit to complete the section.
If the Location, Department and/or Division needs to be changed, click the Settings tab.

- Make any necessary changes for the Location, Division and/or Department
- Click Update Settings
In the **Originator** role, the following options are available in the *Take Action on Position Request* button once the information has been reviewed and is correct (Click on the drop down arrow to select the appropriate action):

- **Keep Working on the Position Request** – allows additional edits/additions/add notes.
- **Cancelled (move to Action Canceled)** – cancels the action (this does not delete the position from the system, merely deactives the position).
- **Send to HR (move to HR Review)** – sends the position to HR for review and approval.

**Hiring Authority Role Options**

In the **Hiring Authority** role, the following options are available in the *Take Action on Position Request* button once the information has been reviewed and is correct (Click on the drop down arrow to select the appropriate action):

- **Keep Working on the Position Request** – allows additional edits/additions/add notes.
- **Cancelled (move to Action Canceled)** – cancels the action (this does not delete the position from the system, merely deactives the position).
- **Return to Originator (move to Originator)** – if the Hiring Authority wants changes, this option move the position back to the Originator to make the changes. *Note: the Hiring Authority has the ability to edit the position as well instead of sending it back.*
- **Send to HR (move to HR Review)** – sends the position to HR for review and approval.
In the **HR Rep** role, the following options are available in the **Take Action on Position Request** button once the information has been reviewed and is correct (Click on the drop down arrow to select the appropriate action):

- **Keep Working on the Position Request** – allows additional edits/additions/etc.
- **Cancelled (move to Action Canceled)** – cancels the action (this does not delete the position from the system, merely deactivates the position).
- **Send to Hiring Authority (move to Hiring Authority)** – sends the position to the Hiring Authority for review and approval.
- **Send to HR (move to HR Review)** – sends the position to HR for review and approval.
Once an action has been selected, the following message box will appear:

- **Note:** the *Take Action* language will vary depending on what action is selected.
- Add any comments for the next user, if approving position type “Approved”
- If the box is checked below the comment box, this position will be added to your Watch List. This will enable you to check the status of the request.
- Click Submit

- The green bar indicates that the position was successfully transitioned and was added to the watch list.
- Click the Home tab
WATCH LIST

- Scroll down to the Watch list

- Click on the Position Requests tab
- Scroll down to the bottom; the position just created will be listed
- Title – indicates the title of the position created
- Type – indicates the type of position (Staff, Faculty, Student)
- Current State – indicates what user role the position currently resides with
- State Owner – indicates the current workflow state owner of the position
- Creator – indicates the person who created the position
- If the position has been placed in the Watch List, the Current State and State Owner will update as the position moves through the system.
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REMOVING POSITION REQUEST FROM WATCH LIST

To remove a position from your Watch List:

- Click on the “Watch List”

- If the position has been posted, it will be listed in the “Postings” area
- Click the Actions tab
- Select “Stop Watching Posting”
- The position will be removed from this area

- The green bar indicates that the Posting was removed from your Watch List.
If the position is in a Hiring Proposal, it will be listed in the “Hiring Proposal” area

Click the Actions tab

Select “Stop Watching Posting”

The position will be removed from this area

If the position is a Position Request, it will be listed in the “Position Requests” area

Click the Actions tab

Select “Unwatch Position Request”

The position will be removed from this area

The green bar indicates that the position was removed from your Watch List from the area you selected

When finished, click the logout button
SEARCHING FOR POSITION DESCRIPTION

Once a Position request or modification has been started the Position will be found in **Staff Position Requests**

- Any position that is awaiting approval by Human Resources
- Any incomplete positions will appear in this section instead of Staff
- View will be limited by your departmental and role authority

**Staff Position Requests**

- There is a keyword search that will search for **Working Title**
- **More Search Options** will give more specific look up options

**Staff Position Requests**

- Use Department, Position Number or use dropdown for Classification Title or Workflow State to narrow your search.
  - Position Number search does not always work, use in **Search** unless the position is approved, **once** approved use **Position Number** field.
MODIFYING POSITION DESCRIPTION

When changes are required on an approved position

- Select Staff
- Search for the previously approved version of the position

- Select Modify Position Description

- Warning and confirmation that request will lock the position and that you do want to modify.
- Select Start
- This will open the position for editing
- Once this is started the position will need to be selected from the Staff Position Requests section.
- If a Hiring Proposal is started on a position number no modifications are allowed until Hiring Proposal is accepted or declined.