This document contains the training materials from the iForms Position Management Overview Sessions. It includes the following sections:

1. Process Overview
2. Positions Management Web Tools to iForms Crosswalk
3. Step by Step Instructions
4. Who Ya Gonna Call
1. Process Overview

Create Position & Reclassify Position

Initiator creates iForm → Approver approves iForm → R&R reviews JAQ, discusses w/Dept. → iForm enters SAP System

EXPRESS: Create Position & Reclassify Position

Initiator creates iForm → Approver approves iForm → iForm enters SAP System

Open Requisition

Initiator creates iForm → Approver approves iForm → Position Data sent to Resumix overnight → Recruitment contacts Dept. for Job Description

Delimit Position

Initiator creates iForm → Approver approves iForm → iForm enters SAP System
2. Position Management Web Tools to iForms Crosswalk

1. Create and Fill a Position.

<table>
<thead>
<tr>
<th>Position Management Web Tools</th>
<th>iForms Position Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Position</td>
<td>Create Position</td>
</tr>
<tr>
<td>Create and Fill Position</td>
<td>Receive Email Notification</td>
</tr>
<tr>
<td>RFO Web Tools (Hire)</td>
<td>Open Requisition</td>
</tr>
<tr>
<td></td>
<td>RFO Web Tools (Hire)</td>
</tr>
</tbody>
</table>

2. Reclassify a *filled* position.

<table>
<thead>
<tr>
<th>Position Management Web Tools</th>
<th>iForms Position Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reclassify Existing Position</td>
<td>Reclassify Position</td>
</tr>
<tr>
<td>Complete Staff Change Form</td>
<td>Receive Email Notification</td>
</tr>
<tr>
<td></td>
<td>Complete Rate and Schedule Change Form</td>
</tr>
</tbody>
</table>

3. Reclassify and fill a vacant position.

<table>
<thead>
<tr>
<th>Position Management Web Tools</th>
<th>iForms Position Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reclassify and Fill Vacant Position</td>
<td>Reclassify Position</td>
</tr>
<tr>
<td>RFO Web Tools (Hire)</td>
<td>Receive Email Notification</td>
</tr>
<tr>
<td></td>
<td>Open Requisition</td>
</tr>
<tr>
<td></td>
<td>RFO Web Tools (Hire)</td>
</tr>
</tbody>
</table>

4. An employee is leaving Duke July 1, 2006. The position will be filled with a lower level job.

<table>
<thead>
<tr>
<th>Position Management Web Tools</th>
<th>iForms Position Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete Termination Form in iForms</td>
<td>Complete Termination form</td>
</tr>
<tr>
<td>Reclassify and fill the position</td>
<td>Reclassify the Position</td>
</tr>
<tr>
<td>RFO Web Tools (Hire)</td>
<td>Receive Email Notification</td>
</tr>
<tr>
<td></td>
<td>Open Requisition</td>
</tr>
<tr>
<td></td>
<td>RFO Web Tools (Hire)</td>
</tr>
</tbody>
</table>

5. Start the recruiting process for an Administrative Assistant.

<table>
<thead>
<tr>
<th>Position Management Web Tools</th>
<th>iForms Position Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Requisition</td>
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</tr>
<tr>
<td>RFO Web Tools (Hire)</td>
<td>RFO Web Tools (Hire)</td>
</tr>
</tbody>
</table>

6. Delete an obsolete position.

<table>
<thead>
<tr>
<th>Position Management Web Tools</th>
<th>iForms Position Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete a Position</td>
<td>Delimit a Position (put end date)</td>
</tr>
</tbody>
</table>

7. Move a position from one Organization Unit to another. (Future)

<table>
<thead>
<tr>
<th>Position Management Web Tools</th>
<th>iForms Position Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reorganize a Position</td>
<td>Reorganize a position</td>
</tr>
</tbody>
</table>
3. The Position Management iForms will replace the Position Management web tools. A position must exist before a person can be hired into the SAP system.

Position Management includes accessing Position information and four transactions.

- Accessing Positions: page 4
- Create Position (by Copying Existing Position): page 5
- Reclassify Position (Change Job Code): page 7
- Rate & Schedule Change for Reclassified Position: page 8
- Open Requisition (Fill Position): page 9
- Delimit (Delete) Position: page 11
- Viewing Status of Transactions: page 12

### Accessing Positions

1. Log into the iForms website: [iforms.oit.duke.edu](http://iforms.oit.duke.edu). *(Note: do not type in http://www.)*
2. When prompted, enter your NetID and password. (If your browser pops up a security dialog box, click on the “Yes” button.)
3. Select the **Staff & Positions** tab.
4. Click on **Positions** to go to the Positions Search page.

There are two ways to search for a position: by the Position Number, or selecting the position from the Org Unit Position List. The Position Search page, which requires entering the Position Number, is the default.

**Using the Position Number:**

1. Type the Position Number in the **Enter the Position Number** box and click on the **Search** button.
2. The position will be displayed:
3. To perform one of the Position Management transactions, click on the iForms icon.
4. Click on the iForm you wish to submit.

Selecting the position from the Position List:
1. In the Detailed Navigation box, click on **Positions**.
2. A list of the Organization Unit(s) and positions you can access will display.
3. Click on the Org Unit that owns the position you want to work with. The positions will display.
4. To perform one of the Position Management transactions, click on the iForms icon for that position.
5. Click on the iForm you wish to submit.

Create Position (by Copying Existing Position)

To create a new position, you **must copy the position data from an existing position**. If necessary, you may change some of the position attributes.

1. Search for a position by entering the position number in Position Search or clicking on Positions to go to a list of positions in an Org Unit.
2. Identify the position that is closest to the one you wish to create and click on the iForms icon. Select the **Create Position** iForm. The information about the position you selected to copy will default at the top.

(Note: if there are no positions at all in the Organizational Unit, copy a position from another Org Unit that is close to what you want and change the Org Unit number)
3. The top of the form will indicate if a JAQ (Job Assessment Questionnaire) is required. If the JAQ is not required, you will see the Express Classification iForm.

4. Fill out the Create Position iForm, including checking the **Effective Date** of the new position. The **Employee Group**, **Personnel SubArea**, and **Cost Center** may be changed. You can enter **Job Code** information or leave the **Job Code** field blank. **NOTE:** Employee Subgroup will be set to the standard position shift. To make a change in the Employee Subgroup, use the Rate and Schedule Change iForm.

5. Enter a **Primary Department Contact** and **Telephone Number**; both are required.

6. Click the **Continue** button to go to the JAQ. The JAQ contains **five** required fields: three Job Responsibilities; Education; and Experience (Relevant Experience will show for the Health System). Enter three job responsibilities or duties and the percentage of time for each duty in the **Responsibility/Duty** fields.

7. Fill in the required **Education** and **Experience** sections of the JAQ and as many of the other sections as necessary.

8. Click the **Check** button to check for errors.

9. Enter any appropriate comments in the **Comments** field.

10. Click the **Submit** button to submit the position for approval. Make note of the Position Number on the confirmation page. The iForm will route for approvals.

  • **Note:** although this form routes electronically, there will still be conversations about the position with R&R or your HR department.
Approvals and Workflow
All Position Management transactions require approval. They follow the same approval path as other iForms for your Org Unit.

Assignment of Position Number at Submission
When a Create Position iForm is submitted, the position number is assigned and displayed in the confirmation screen and approval views. This allows users to monitor the status of the request and to view the iForm in various approval stages.

Reclassify Position (Change Job Code)
1. Find the position, using either Position Number or Position List.
2. Click on the iForms icon to go to the Positions iForms page.
3. Click on the Reclass Position iForm.
4. The position information will default.
5. The top of the form will indicate if a JAQ (Job Assessment Questionnaire) is required. If the JAQ is not required, you will see the Express Classification iForm.
6. Enter the Effective Date of the reclassification. You may change the Employee Group, Personnel SubArea, and Cost Center.
7. Assign the new Job Code.
8. Enter a Primary Department Contact and telephone number (both are required).
9. Click the Continue button to go to the JAQ. Enter at least three job responsibilities:
10. Fill in the required **Education** and **Experience** sections of the JAQ and other sections as necessary.

11. Click the **Check** button to check for accuracy and add **Comments** as required.

12. Click the **Submit** button to submit the position for approval. A Position number will be assigned (see below) and the Reclass Position iForm will route for approvals.

**Rate & Schedule for Reclassified Position**

After the Position Reclassification has been completed, all users in the approval chain will receive an email notification. The Initiator must submit a Rate & Schedule change iForm.

1. Note the **Effective Date** – make the date equal to or after the date on the position.

2. On the **Staff** page, enter the search criteria for the employee holding the position.

3. Select the iForm icon.

4. Select the **Rate & Schedule Change** iForm. Note the following:
   - The effective date defaults to the current pay period.
   - The job code in the header is based on the effective date.
   - A new check box for Employee Reclass Change is available.

5. Enter the **Effective Date** of the reclassification.
6. Check all check boxes that apply. You must check the **Employee Reclas Change** check box to retrieve the new position information.

7. Choose **Select** to proceed.

8. Based on your information you entered the detail entry screen is displayed. Please note:
   - The job code displayed in the header is based on the effective date. If you don’t see the correct job code, the effective date is incorrect.
   - Reasons default to position reclassification.

9. Enter the required information and Check/Submit the iForm.

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**Open Requisition (Fill Position)**

1. Find the position, using either the Position Number or Position List.
2. Click on the iForms icon to go to the **Positions** iForms page.
3. Click on the **Open Requisition** iForm.
4. The position information will default.
5. **Search for Hiring Manager** using **Personnel Number** (Duke Unique ID) or the **Last Name**. The system will search for the Personnel Number. **NOTE: This should be the person who will be reviewing the applicants or departmental requirements.** Click on **Search** to verify the Hiring Manager’s name and DUID.

6. Click on the **Continue** button.

7. Enter the **Effective Date**.

8. Enter the appropriate **Requisition Details**: **Location**; **Shift**; **Full Time/Part Time**; **Position Type**; and **Hours Worked Per Week**. **Note: these changes on the Requisition do not automatically change the position – these changes go to the hiring website. To change the position, do a reclassification for that position.**

9. Review the **Occupational Summary**.

10. Enter any preferences for the position in the **Preferences** field.

11. Click on the **Check** button and enter appropriate comments in the **Comments** field.

12. Click on the **Submit** button.
**Delimit (Delete) Position**

1. Find the position, using either Position Number or Position List.
2. Click on the iForms icon to go to the Positions iForms page.
3. Click on the **Delimit Position** iForm.
4. The position information will default.

5. Enter the **Effective Date** of the delimit.
6. Enter appropriate comments in the **Comments** field.
7. Click on the **Submit** button.

**NOTE:** If the delimit is for a future date, the Position will remain visible in the Position List until the effective date has passed.
Viewing Status of Transactions

Users may view the status of Position Management transactions in one of three ways.

1. Search for the position using Position Search (enter the position number). If a transaction exists, it will appear below the search results.

2. Search for the position using the Position List. Clicking on the Position’s icon in the List of Forms column will produce a list showing the transaction.

3. The transaction will appear in the Initiator’s iForms Overview list. Click on iForms Overview. The assigned position number for Create Position will show in the list.
4. Who Ya Gonna Call?

**User IDs and Passwords (User Profiles):**

Check with your department’s User Administrator. He/she will submit a request to create a user account (profile) or update your existing profile.

**Technical Questions:**

1. On the iForms website Home page, click on the “Ask for Help” link and submit your question using the “Online @ Duke” form.
2. In the “Technical Support Group” box, select “iForms Support.”

**Functional Questions (“How do I...?”):**

**Positions:**
Call HR: Rewards & Recognition (R&R)—684-5569 – OR – Your entity HR office

**Requisitions:**
Call the HR Information Center (HRIC)—684-5600 – OR – Your assigned recruiter

**Training:**
- For iForms training requests, email: fs-training@duke.edu

**General:**
- To use iForms, go to: iforms.oit.duke.edu
- For general SAP information, go to: www.r3.duke.edu
- For GAP information (accounting procedures), go to: finance.duke.edu
- For Human Resources issues, go to: www.hr.duke.edu
- For Payroll issues, go to: www.payroll.duke.edu