

ellucian®

Banner Position Description Handbook

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Position Description Application Overview

You can use the Position Description application to create and maintain position descriptions. Before setting up this application, you should be aware of how this application uses Banner® Human Resources security. You should also be familiar with the terminology and user roles that are used in the application.

About the Position Description application

The Banner Position Description application allows you to create, modify, and approve a position description. You can use the application to build a position description library, which stores approved position descriptions.

You can also use this application for the following:

- Create configuration templates (required for creating position descriptions)
- Identify originator positions
- Identify proxy users for yourself
- Determine if proxies can assume superuser capabilities
- Upload and view attachments
- Export data

Banner Human Resources security for Position Description application

Banner Human Resources provides application specific security which can be applied while creating a configuration template or position description, approving a position description, or searching for a position description in the library. Security can be established by employer, employee class code, organization code, or salary level.

For more information about Banner Human Resources security and Banner administrative pages on which the security is established, see the *Banner Human Resources/Position Control User Guide*.

Terminology used in Position Description application

When setting up and using the Position Description application, it is helpful to understand the terminology used in the application.

Term	Definition
Approver	Approves the position description
Configuration Template	A page that allows an administrator to configure and determine position information fields that must appear on a position description.
Effective Date	Start date on which a position description can be used for describing a position.
End Date	End date on which a position description is no longer active.
Library	A collection of approved position descriptions.
Originator	Creates the position description
Position Description	A position description is an online document that describes the duties and responsibilities, education, and skills required of the position.
Proxy	Authorized to act in place of an Administrator, Originator, Approver, or Superuser A proxy user can be set up by using administrative Banner or by using the Position Description application.
Superuser	User with capabilities to take action as an Administrator, Originator, or Approver.

User roles and access

As a Position Description application user, the tasks you can perform vary depending on the role assigned to you. The role determines if you can establish institutional settings, create a configuration template, create a position description, or approve a position description.

Note: To access Position Description application, users must have their user IDs established on the Enterprise Access Controls (GOAEACC) and User Codes Rule (PTRUSER) pages. A Banner administrator has access to these pages.

The following table lists different types of user roles for the Position Description application and the tasks performed by each role.

User role	Tasks
Administrator	<ul style="list-style-type: none"> • Set template tracking method • Determine if a proxy user can assume superuser capabilities • Identify originator positions • Identify a proxy user for yourself • Create and manage configuration templates • Export position descriptions
Approver	<ul style="list-style-type: none"> • Review, approve, or return a position description • Identify a proxy user for yourself <p>Note: If the approver action for a user role is set to <code>FYI</code> in the Routing Queue Rule (NTRRQUE) page, then such a user can only acknowledge a position description.</p>
Originator	<ul style="list-style-type: none"> • Create and manage position descriptions • Copy a position description from the library • Identify a proxy user for yourself
Proxy	<p>Perform tasks based on the user role for which you are acting as a proxy</p> <p>A proxy can act in place of an administrator, originator, approver, or superuser.</p>
Superuser	<p>Perform administrator, originator, and approver tasks</p> <p>A superuser role ensures business continuity.</p>

Setup requirements in Banner applications

To use the Position Description application, certain setup requirements need to be established in Web Tailor and Banner® administrative pages. These requirements enable Position Description application users to perform their tasks successfully.

Be aware of the following setup requirements:

- User IDs for Position Description application users are set up on the Enterprise Access Controls (GOAEACC) and User Codes Rule (PTRUSER) pages.

The user ID setup allows the Position Description application users to access the application. A Banner administrator has access to these pages.

- Administrator and originator user roles for the Position Description application are assigned in Web Tailor.

The Web Tailor administrator assigns these roles in Web Tailor.

Note: Alternatively, an originator role can be assigned to a position number on the **Administration** page within the Position Description application. This allows any incumbent in that position to be an originator.

- The position description approval category, `PDESC`, is established on the Electronic Approvals Category Code Validation (NTVACAT) page.

The code, `PDESC`, is delivered in an installation script and should not be changed or deleted unless Ellucian instructs you to do so.

- The routing (approval) queue for the position description approval category is set up on the Routing Queue Rule (NTRRQUE) page.
- A proxy module code for the position description approval category, `PDESC`, is created on the Proxy Module Code Validation (NTVPRXM) page.

The code, `PDESC`, is delivered in an installation script and should not be changed or deleted unless Ellucian instructs you to do so.

- A Banner user is identified as a Superuser on the User Code Rule (PTRUSER) page.
- Codes and descriptions for certain fields on the position description are established on the following Banner administrative pages:
 - Duties and responsibilities on the Position Class Description Validation (PTVCDES) page
 - Skills on the Skills Code Rule (PTRSKIL) page
 - Skill Levels Rules (PTRSKLV) page
 - Examinations on the Exam Code Rule (PTREXAM) page
 - Certifications and Licenses on the Certification Code Rule (PTRCERT) page
 - Degrees on the Degree Code Validation (STVDEGC) page
 - Major, Minor, Concentration on the Major, Minor, Concentration Validation (STVMAJR) page

The Banner administrative pages for some of these fields have two types of description fields: Description and Self-Service Description. The field length of Description for position description fields such as Duties and Responsibilities is 60 characters and Skills, Examinations, and Certifications is 30 characters. The field length of Self-Service Description is 250 characters.

The Position Description application selects the description from the Banner Administrative page depending on the description code for the fields the user selects while creating a position description. If the Self-Service Description is null or not present, the Description is selected by the application.

For more information about Web Tailor roles, see *Banner Web Tailor User Guide*.

For more information about approval category and routing queue, see *Banner Electronic Approvals Handbook*.

Position Description Concepts

A position description is an online document that defines the requirements of a position. Position descriptions must be approved before they go into effect. Approved position descriptions are stored in the position description library.

What is a position description

A position description is an online document that you can use to describe the duties and responsibilities, education, and skills required of the position.

Position description status

A position description can have one of the following statuses in the Position Description application: In Progress, Pending, Returned, Active, and Inactive. The status of a position description indicates the different types of tasks that can be performed on the position description.

When a position description is created, by default the status of the position description is In Progress.

Status	Description
In Progress	A position description can be modified and submitted for approval or it can be deleted.
Pending	A position description has been submitted for approval and is pending with an approver. Depending on the approver action, an approver can either approve or acknowledge the position description. Approver can also return the position description for correction.
Returned	A position description has been returned by an approver for correction. The position description can be modified and submitted for approval again or it can be deleted.
Active	A position description has been approved by all approvers in the routing queue and an active position number exists for the position. Active position descriptions are stored in the position description library.

Status	Description
Inactive	When an approved position description moves to the library and has the same position number as that of an existing position description within the library, the existing position description is automatically set as inactive by the Position Description application.

Related Links

[User roles and access](#) on page 5

About the position description approval process

When a position description is submitted for approval, Position Description application routes the position description to approvers in the routing queue. For the final approval to be successful, a position number must be assigned to the position description. The position number must be defined on the Position Definition (NBAPOSN) page and should be in the active status.

An approval category is required for defining a position description routing queue. The approval category is established on the Electronic Approval Category Code Validation (NTVACAT) page and the routing queue is set up on the Routing Queue Rule (NTRRQUE) page. The approval category for position description is PDESC.

Position Description application routes the position description to approvers in the routing queue based on approver sequence. An approver sequence determines the order in which the approvers receive the position description for approval. Depending on the approver action field value on the NTRRQUE, an approver in the routing queue can either approve or acknowledge a position description. However, the acknowledge action is optional and does not prevent the position description moving through the approval process.

After the final approval, the position description attains “Active” status and is stored in the position description library.

For more information about the routing queue and approver action, see *Banner Electronic Approvals Handbook*.

About the position description library

The position description library is a collection of approved position descriptions. You can use the library to view the history of an approved position description or create a position description by copying from an existing position description in the library.

When a new position description is approved, the position description becomes active and moves to the library. In the library, if another position description exists for the same position number as the new approved position description, the Position Description application automatically sets the End Date of the existing position description as one day earlier than the Effective Date of the new position description. The status of the existing position description becomes inactive.

For a position, only a single position description can be active at a time.

Administrator Tasks

You can use the Position Description application to set the template tracking method, identify originator positions, identify proxy users for yourself, and export position descriptions. You can also create and manage configuration templates. This enables other user roles to perform their tasks successfully to build a position description library.

Related Links

[User roles and access](#) on page 5

[Setup requirements in Banner applications](#) on page 6

What is a configuration template

A configuration template contains fields that can be selected to build a position description. Administrators can configure and determine which fields must appear on a position description. This ensures consistency when originators build position descriptions.

Some of the fields on the template are gathered from the Banner administrative pages and value for these fields can be modified only in the pages by using the appropriate Banner applications. The template also consists of custom fields that enables an originator to include additional information in a position description.

Administrators can create configuration templates based on the template tracking method (employee class or position class) which is selected in the Position Description application. This enables an originator to use the correct template while building a position description.

Establish institutional settings

You can set the configuration template tracking method and identify originator positions. This enables the originator to build position descriptions. You can also grant superuser capabilities to proxy users and allow all employees to view the position description library.


Before you begin

- Ensure that you have administrator rights set up in Web Tailor to establish institutional settings. For more information about Position Description application administrator role setup, see [Setup requirements in Banner applications](#) on page 6.
- To assign an originator role to a position number, the position number must have already been established on the Position Definition (NBAPOSN) page.

About this task

A configuration template can be tracked either by employee class code or position class code.

Procedure

1. Click **Settings** .
2. Select **Administration**.
3. On the **Administration** page, choose the template tracking type.
4. **Optional:** If a proxy for a Superuser can have Superuser capabilities, then select the **Proxy Assumes Superuser Capabilities** check box.
5. **Optional:** If all employees need access to the position description library, then select the **Make Position Description Library available to all Employees** check box.
An employee can view only position descriptions associated with the employee's assigned jobs.
6. Identify originator positions for building position descriptions.

If you want to use...	Then...
Web Tailor	<ol style="list-style-type: none"> 1. Skip this step. 2. See <i>Banner Web Tailor User Guide</i> to assign an originator's role to a user.
Position Description application	<ol style="list-style-type: none"> 1. Click Add Originators. 2. In the Search box, enter the position number or position title of the user you choose to add as originator. 3. Select the originator.

7. Click **Save**.

Create a configuration template

You can create a configuration template by choosing fields that are necessary to build a position description. A configuration template ensures consistency when originators build position descriptions. The template is based on either the employee class code or position class code.

Before you begin

Make sure that you have chosen the desired template tracking method (employee classification or position classification).

By default, employee classification is established as the template tracking method.

About this task

Some of the fields on the configuration template are gathered from Banner applications such as Banner Human Resources or Banner Position Control. This information cannot be modified by using the Position Description application.

Procedure

1. On the **Position Description Library** page, click **Configuration Template** tab.
2. On the **Configuration Template** page, click **New Configuration Template**.
3. On the **New Configuration Template** page, depending on the template type established, enter the employee class code or the position class code.
The configuration template appears.
4. Select the fields that are required for building the position description.
The fields in the **Additional Position Information** section have the following character limit:
 - Working Title- 30
 - Division- 30
 - Summary- 2500
5. **Optional:** Configure the **Custom Fields** section.
 - a) Select the **Custom Date** or **Custom Text** fields and enter a label name for these fields.
Label name can be a maximum of 30 characters in length and Custom Text fields can be a maximum of 250 characters in length.
 - b) In the **Select Display Section** field, select the position description section in which the custom field must appear.
6. Click **Save**.

Related Links

- [Establish institutional settings](#) on page 11
- [What is a configuration template](#) on page 11

Modify a configuration template

You can modify an existing configuration template to add or remove fields from the template.


About this task

Some of the fields on the configuration template are gathered from Banner applications such as Banner Human Resources or Banner Position Control. This information cannot be modified by using the Position Description application.

When a configuration template which has been used for creating a position description is modified, the version number of the template increases by one. This ensures that the originator always uses the latest updated template.

Procedure

1. On the **Position Description Library** page, click **Configuration Template** tab.
2. On the **Configuration Template** page, search for a template by using the tracking type or the description (employee class or position class).
Depending on the search keywords, a list of templates appears.

3. Select the configuration template you choose to modify.
4. Click **Action Menu** .
Action Menu displays the list of tasks that can be performed on the template.
5. Click **Edit**
The configuration template appears.
6. Make changes to the template by selecting or clearing the fields that are required for building the position description.
7. Click **Save**.

Related Links

[What is a configuration template](#) on page 11


Copy a configuration template

You can create a new configuration template by copying an existing configuration template. This ensures consistency in templates for a particular employee class or position class that has position requirements similar to that of an existing template.

About this task

The copy functionality also allows you to make optimum use of your time while creating configuration templates for similar position requirements.

Procedure

1. On the **Position Description Library** page, click **Configuration Template** tab.
2. On the **Configuration Template** page, search and select the configuration template from which you want to create a new template.
3. Click **Action Menu** .
Action Menu displays the list of tasks that can be performed on the template.
4. Click **Copy**.
5. In the **Copy Template** window, depending on the template tracking type, enter the employee class or position class.
6. Click **Save and Proceed**.
7. On the **New Configuration Template** page, make changes to the template by selecting or clearing the fields that are required for building the position description.
8. **Optional:** Configure the **Custom Fields** section.
 - a) Select the **Custom Date** or **Custom Text** fields and enter the label name for these fields.
 - b) In the **Select Display Section** field, select the position description section in which the custom field must appear.

9. Click **Save**.

Related Links

[What is a configuration template](#) on page 11

[Modify a configuration template](#) on page 13

Export position description data

You can export position description data to a `.zip` file from the Position Description library. This exported data can be used by third-party applications.

About this task

The `.zip` file consists of text files. Depending on the position description data, text files contain information such as Certifications, Examinations, Education, Skills, and Responsibilities of a position.

Procedure

1. On the **Position Description Library** page, click **Advanced Search**.
2. Enter the dates in the **Effective Date From** and the **Effective Date To** fields.

Position description data is exported only from position descriptions that are effective between these dates.

If the Position Description library has multiple position descriptions for the same position number within the entered date range, only the *Active* position description is exported.

3. **Optional:** Based on your requirements, enter the information in the other fields such as Position Number, Position Classification, Employee classification, and Organization code on the **Advanced Search** window.
4. Click **Search**.
Position descriptions that match your requirements are listed on the **Position Description Library** page.
5. Click **Export**.
6. Save the `.zip` file on your local machine.

What to do next

Copy the files from your machine to the location as per the requirement of the third-party application.

For more information about how the exported position description information is processed by the third-party application, see the corresponding third-party application documentation.

Related Links

[About the position description library](#) on page 9

Originator Tasks

You can use the Position Description application to build position descriptions. You can create and modify position descriptions and submit them for approval. You can keep track of position descriptions that have been submitted for approval. You can also view the completed position descriptions in the position description library.

Related Links

[User roles and access](#) on page 5

[Setup requirements in Banner applications](#) on page 6

Position description data

A position description has fields based on the configuration template created for an employee class or position class.

Initial position description data defaults from the Banner® administrative pages on the position description. This data can be modified only by using the relevant Banner application. It is recommended to refresh this data before submitting a position description for approval. This ensures that the position description consists of the latest valid data from the Banner administrative pages.

Related Links

[What is a configuration template](#) on page 11

Create a position description

You can create a position description by completing the fields on the position description page.

Before you begin

- The description codes for the position description data in the fields such as duties and responsibilities, skills, education, examination, and certificates and licenses must be established in the Banner administrative pages.
- To attach an electronic document to a position description, document types must be set up on the Document Management Document Type Validation (ETVDTYP) page for the Position Description application.

For information about Banner Document Management system that enables you to attach electronic documents to the Position Description application, see *Banner Document Management Administration Guide 8.6*.

About this task

For a position number, only a single position description can be in the In Progress status at a time. The latest version of the configuration template is used by the Position Description application while creating a new position description.

Electronic documents can be attached to a position description, which is in the In Progress, Pending (in approvers queue), or Returned status.

Procedure

1. On the **Position Description** page, click **Create New**.
2. Depending on the configuration template type established for building the position description, enter the employee class or position class in the search box.
You can also search by entering the position number of the position.
3. Set the Effective Date of the position description.

Note: Effective Date cannot be modified after the date is established.

Tip: To change the Effective Date of a position description, the existing position description must be deleted and a new position description must be created.

4. Click **Next**.
The new position description appears.
5. Enter the position description data.
6. **Optional:** Attach electronic documents to a position description.
 - a) In the **Additional Position Information** section, click **Attach Documents**.
 - b) Choose the file that you want to attach to the position description.
 - c) Select the document type to which the file belongs.
 - d) Click **Upload**.
7. Click **Save**.

Results

The status of the position description is *In Progress*.

Related Links

[Setup requirements in Banner applications](#) on page 6

[Submit a position description](#) on page 19

[Position Description Concepts](#) on page 8

Edit a position description

You can update a position description that is in the In Progress status or that has been returned by an approver for correction. A returned position description must be submitted for approval again.

Before you begin

To attach an electronic document to a position description, document types must be set up on the Document Management Document Type Validation (ETVDTYP) page for the Position Description application.


For information about Banner Document Management system that enables you to attach electronic documents to the Position Description application, see *Banner Document Management Administration Guide 8.6*.

About this task

The Effective Date of the position description cannot be modified after the date is established. To change the Effective Date of a position description, the existing position description must be deleted and a new position description must be created.

Electronic documents can be attached to a position description, which is in the In Progress, Pending (in approvers queue), or Returned status.

Procedure

1. On the **Position Description** page, search for the position description you choose to update.
A returned position description has comments. These comments enable you to correct the position description.
Depending on the search keywords, a list of position descriptions appears.
2. Click **Action Menu** .
Action Menu displays the list of tasks that can be performed on the position description.
3. Click **Edit**.
The position description appears.
4. Update the position description.
5. **Optional:** Attach electronic documents to a position description.
 - a) In the **Additional Position Information** section, click **Attach Documents**.
 - b) Choose the file that you want to attach to the position description.
 - c) Select the document type to which the file belongs.
 - d) Click **Upload**.
6. Click **Save**.

Related Links

[Submit a position description](#) on page 19


Submit a position description

After building a position description, you can submit the position description for approval. After submission, the position description cannot be modified unless returned for correction.

Before you begin

- A routing queue must be established on the Routing Queue Rule (NTRRQUE) page.
- The following are required while submitting the position description if the position description does not have a position number:
 - Organization code
 - COA (Chart of Accounts) if Banner Finance is installed on your system

Procedure

1. On the **Position Description** page, search for the position description you choose to submit.
2. Click **Action Menu** .
Action Menu displays the list of tasks that can be performed on the position description.
3. Click **Edit**.
The position description page appears.
4. **Optional:** In the **Position Number** field, enter the position number.
5. Click **Submit**.
The approval queue window appears only if there are multiple incumbents in the approver sequence. One of the incumbents must be chosen as an approver.
The position description status changes to *Pending*.

Results

The Position Description application routes the position description to approvers in the routing queue.

Related Links

- [About the position description approval process](#) on page 9
- [Position description data](#) on page 16

Copy a position description


You can create a position description by copying a position description from the position description library. The copy functionality allows you to make optimum use of your time while creating position descriptions for similar position requirements.

About this task

Electronic documents can be attached to a position description, which is in the In Progress, Pending (in approvers queue), or Returned status. To attach an electronic document to a position description, document types must be set up on the Document Management Document Type Validation (ETVDTYP) page for the Position Description application.

For information about Banner Document Management system that enables you to attach electronic documents to the Position Description application, see *Banner Document Management Administration Guide 8.6*.

Procedure

1. On the **Position Description Library** page, identify the position description from which you want to create a position description.
2. Click **Action Menu** .
Action Menu displays the list of tasks that can be performed on the position description.
3. Click **Copy**.
4. In the **Copy Position Description** window, enter the employee class or position class (depending on the template tracking type chosen) or position number to create the position description.
5. Enter the Effective Date.

Note: Effective Date cannot be modified after the date is established. To change the Effective Date of a position description, the existing position description must be deleted and a new position description must be created.

6. Click **Save and Proceed**.
7. On the **New Position Description** page, enter the position description data.
8. **Optional:** Attach electronic documents to a position description.
 - a) In the **Additional Position Information** section, click **Attach Documents**.
 - b) Choose the file that you want to attach to the position description.
 - c) Select the document type to which the file belongs.
 - d) Click **Upload**.
9. Click **Submit**.
The Position Description application routes the position description to approvers in the routing queue.

Related Links

[About the position description approval process](#) on page 9

[About the position description library](#) on page 9

[Approver Tasks](#) on page 22

Approver Tasks

For a position description to be Active, all approvers in the routing queue must approve the position description. Depending on the approver action in the Routing Queue Rule (NTRRQUE) page, you can either approve or acknowledge the position description. You can also return a position description for correction.

Related Links

[About the position description approval process](#) on page 9

[Setup requirements in Banner applications](#) on page 6

Attach a document to a position description

You can upload and attach electronic documents to a position description.

Before you begin


Document types must be set up on the Document Management Document Type Validation (ETVD TYP) page for the Position Description application.

About this task

Electronic documents can be attached to a position description that is in the In Progress, Pending (in approvers queue), or Returned status.

For information about Banner Document Management system that enables you to attach electronic documents to the Position Description application, see *Banner Document Management Administration Guide 8.6*.

Procedure

1. On the **Position Description** page, search for the position description to which you want to attach a document.
2. Click **Action Menu** .
Action Menu displays the list of tasks that can be performed on the position description.
3. Click **Attachments**.
4. On the **Attachments** page, click **Attach Documents**.
5. Choose the file that you want to attach to the position description.
6. Select the document type to which the file belongs.
7. Click **Upload**.
The chosen file gets attached to the position description.

Approve a position description

For a position description to attain Active status, all approvers in the routing queue must approve the position description. Active position descriptions are stored in the position description library.

Before you begin

- You must have already been assigned the approver action as `Approve` on the Routing Queue Rule (NTRRQUE) page.
- An electronic document can be attached to a position description before approving the position description.

About this task

If there are multiple approvers in the routing queue, the Position Description application routes the position description for approval to each approver in the queue. For the final approver to successfully approve the position description, a position number for that position must exist on the Position Definition (NBAPOSN) page.

Procedure

1. On the **Position Description** page, identify the position description that needs to be approved.
2. Click **Approve**.
If you are not the final approver, then the application routes the position description to the next approver in the routing queue for approval and the position description status remains `Pending`.
3. If you are the final approver and a position number has not been provided for the position description, then perform the following:
 - a) Enter the position number of this position.
 - b) Click **Save and Proceed**.

The position description becomes `Active` and is stored in the position description library.

Related Links

[About the position description library](#) on page 9

[About the position description approval process](#) on page 9

[Attach a document to a position description](#) on page 22

Return a position description for correction

You can provide comments and return a position description if it needs correction or updates. This enables the originator to update the position description based on the comments provided.

Before you begin

An electronic document can be attached to a position description before returning the position description for correction.

Procedure

1. On the **Position Description** page, identify the position description that needs correction.
2. Click **Return**.
3. Add comments to indicate the reason for returning the position description.
4. Click **Confirm**.

The status of the position description is `Returned`.

Results

The position description moves to the In Progress queue and must be updated by the originator.

Related Links

[Approve a position description](#) on page 23

[Attach a document to a position description](#) on page 22

Acknowledge a position description for correction

You can acknowledge a position description that has been submitted for approval. However, acknowledging a position description is not mandatory and does not prevent the position description from attaining the Active status.

Procedure

1. On the **Position Description** page, identify the position description that needs to be acknowledged.
2. Click **Acknowledge**.

The position description moves out of your approval queue.

Results

The status of the position description is `Pending`.

Superuser and Proxy Roles

Superuser and proxy roles ensure business continuity. The Position Description application allows you to act as a Superuser, act as a proxy for another user, and identify proxy users for yourself.

Related Links

[User roles and access](#) on page 5

[Setup requirements in Banner applications](#) on page 6


Act as a Superuser

A superuser role helps to ensure business continuity. As a superuser, you have the ability to do all the administrator, originator, and approver tasks in the system.

Before you begin

- You must have already been identified as a position description superuser on the User Codes Rules (PTRUSER) page.
- The superuser role must have Banner® Human Resources security established for performing the relevant tasks.
- The proxy can act in place of a superuser only if the **Proxy assumes Superuser capabilities** is enabled by the Position Description application administrator on the **Administration** page.

Procedure

1. Click **Settings** .
2. Select **Proxy or Superuser**.
3. Select the **Act as a Superuser** check box.
The Position Description application recognizes you as a superuser.

Results

You can now act in place of any administrator, originator, and approver.

Note: To view the position descriptions in the In Progress, Submitted, and Approval queues, on the **Position Description** page, use **Advanced Search**.

What to do next

After completing your tasks as a superuser, you can return to the **Proxy or Superuser** page and stop acting as a superuser by clearing the **Act as a Superuser** check box.

Related Links

[User roles and access](#) on page 5

[Administrator Tasks](#) on page 11

[Originator Tasks](#) on page 16

[Approver Tasks](#) on page 22

Act as a proxy

A proxy user role ensures business continuity. You can act in place of an administrator, originator, approver, or superuser when authorized by one of these user roles.

Before you begin


- A proxy module code for the position description approval category, `PDESC`, must have been established on the Proxy Module Code Validation (NTVPRXM) page.
- The proxy for one of the users must have been established either on the Electronic Approval Proxy Rule (NTRPROX) page or on the **Proxy or Superuser** page in the Position Description application.
- The proxy role must have Banner Human Resources security established for performing the relevant tasks.

About this task

By default, the proxy user is set to `Self`.

Banner Human Resources security established for the proxy user remains the same even while the proxy user is acting in place of another user. Proxy user does not inherit the security established for the user for whom the proxy is set up.

Procedure

1. Click **Settings** .
2. Select **Proxy or Superuser**.
3. On the **Proxy or Superuser** page, in the **Act as Proxy For** field, select the user for whom you want to act as a proxy.
You are established as the proxy for that user.

Results

As a proxy for a user, you can perform all tasks that the user performs in the Position Description application.

Example

If you are acting as a proxy for an originator, you can view all the position descriptions in the originator's In Progress and Submitted queues. You can perform all tasks that an originator performs, such as create and manage a position description, submit the position description for approval, and copy a position description from the library to create a new position description.

What to do next

After completing your tasks as a proxy, you can return to the **Proxy or Superuser** page and stop acting as a proxy by selecting `Self` in the **Act as Proxy For** field.

Related Links

- [Add a proxy user](#) on page 27
- [Act as a Superuser](#) on page 25
- [Administrator Tasks](#) on page 11
- [Originator Tasks](#) on page 16
- [Approver Tasks](#) on page 22

Add a proxy user

A proxy user role ensures business continuity. You can identify proxy users to act on your behalf and perform the tasks assigned for your role.


Before you begin

The user who needs to be added as a proxy must be set up on the Enterprise Access Controls (GOAEACC) page.

About this task

Alternatively, a proxy can be identified on the Electronic Approval Proxy Rule (NTRPROX) page for the position description approval category, `PDESC`. Such a proxy is automatically updated in the Position Description application.

Procedure

1. Click **Settings** .
2. Select **Proxy or Superuser**.
3. Click **Add Proxy**.
4. In the search box, enter the proxy user's name or GOAEACC ID.
5. Select the desired proxy from the search result.
6. Click **Save**.

Results

The Position Description application updates the proxy on the NTRPROX page for the position description approval category, `PDESC`.

For more information about the NTRPROX page, see the *Banner Electronic Approval Handbook*.