Submit a Job Opening Request for an Academic Rank Position

Purpose:
The purpose of this document is to guide users through the process of submitting a Job Opening Request (JOR) for a new Academic Rank position (Continuing, Contingent or Limited Term appointment).

The Job Opening Request form is used to validate funding/budget, obtain the required approvals to hire, collect all information required to post a job, and where necessary, create/update position information.

Audience:
University of Calgary employees and managers recruiting for an Academic Rank position

Prerequisites:
Before you proceed with this transaction, ensure the following has occurred:

- Upfront conversations with senior management/budget owners to identify the source of funds, budget amount and budget Dept ID and/or recovery information for this position. You will need this information to complete the JOR.
- A position posting has been created for the role as outlined in the appropriate Guidelines for Position Posting document.

Related Documents
For related Job Opening Request (JOR) learning resources visit: Job Opening Request Enhancement Project

QuickLinks
Academic Rank Position
- Step 1: Navigation and Create Job Opening Request
- Step 2: Questions and Introduction
1. Log into the **my UCalgary** portal

2. To navigate to the Job Opening Request form, go to: **My work** → **People management** → **Job opening request**

3. Click the **Create Job Opening Request** button

**NOTE:** To optimize the page for smaller screens, you can minimize the left HR Transactions menu and use the Zoom option in your browser settings to avoid having to scroll left to right.
Step 2: Questions and Introduction

The Questions section captures the initial information required to complete the JOR. Additional pages/sections required will be assembled based on the answers provided. Review the Instructions page for key information related to the type of request you are submitting.

For Academic Rank positions there are two paths depending on whether a position number exists. Click the image below to navigate to the section of this job aid that matches the position you are hiring.

**NOTE:** Academic rank position numbers are not re-used. A position number would exist only if your Finance Partner has provided a To Be Classified (TBD) position number as part of the budgeting process.

Click the image above to for the steps to submit a request for a new Academic Rank position. Click the image above for the steps to submit a request for an existing (To-Be-Classified) Academic Rank position.

New Academic Rank Position

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Step 2: Questions and Introduction

Questions
Provide your responses to the questions using the Instructions links provided for more information if you are unsure how to respond.

1. Click **Save** on the upper right of the page

Introduction
2. The Introduction page provides additional information and links to related resources. Review and click **Next**
NOTE: You can navigate through the submission process by using the menu at the left of the screen or using the Previous and Next buttons located at the top right of the screen.

Step 3: Job and Position Data

New Information

1. Enter the five-digit Department ID or use the Look up function to search. This is the ‘home’ department under which the position resides.

   The Faculty/Unit information auto-populates based on the Department selected.

2. The Position/Job Title field is the title of the position record and is limited to 30 characters in length. This title is often an abbreviated version of the Posting Title identified later in the form, which is the title that will be displayed on the job posting.

3. In the Reports to Position Number field, enter the position number of the Reports to Manager or use the Look up function to search.

   The manager’s name and Employee ID will auto-populate based on the position selected.

   NOTE: In situations where the Reports to Manager is a Department Head or Dean, ensure the position number identified is their administrative appointment, not their rank academic appointment. This ensures that any changes to the role of Head/Dean will not require changes to reporting relationships.

4. Click the Job Code Look up button and select the appropriate job code from the list.

   The Job Family, Classification and Salary Range fields auto-populate based on the Job Code selected.

   NOTE: The Job Code field is equivalent to the rank of the position. In situations where the rank is unknown, enter the highest possible rank so the approval for the position is given for the highest level. For example, if the qualifications of the successful candidate will determine whether you hire at the Assistant or Associate Professor
rank, enter ‘Associate Professor’ as the Job Code. If the successful candidate is hired at the rank of Assistant Professor, the position information will need to be updated accordingly.

5. Select **Full/Part Time** from the drop-down menu.

6. The **Standard Work Hours** field defaults based on the standard hours for the job code indicated. Adjust the standard hours per week as necessary for part-time positions.

7. Select the **Employee Classification** from the drop-down menu.

   **NOTE:** The Employee Classification Help links to the Empl Class Quick Reference Sheet for more details on Empl Class options.

8. The **Funding Source** will default for permanent positions. For Contingent or Limited Term positions, select from the drop-down menu.

   If One-Time is selected, enter the One Time Funding End Date.

**Job Related Information**

9. Enter the **Approximate Length of Term (in months)** for all term positions.

10. Enter the **Maximum Offer Amount (annualized)**, the annual budgeted amount for the role. The final salary offered cannot exceed this amount. Review the Max Offer Amount Help for additional information.

11. Identify if there is a Strong Internal Candidate for the role. If Yes enter the Employee ID or use the Look up.

12. Identify if this position is replacing an existing employee. If Yes, enter the Employee ID or use the Look up and select a **Replacement Reason** using the Look up feature. Add any additional context in the comments provided.

**Position Rationale**

13. Summarize the business need for this role and identify where the budget to support the position is coming from in the Position Rationale section.
14. Scroll to the top of the page and click **Save**
15. Click **Next**

**Step 4: Budget**

The Requested Job/Position Data at the top pulls information entered on the previous page for reference.

**Salary and Benefit Chartfield Information**

1. The accounting string will default based on the Department entered, however it can be edited as required. Click **Edit ChartFields** and review and validate the accounting.

2. Click **Done**

**NOTE:** Clicking the **Edit ChartField** button to review and validate the accounting is a required step.

Additional rows can be added by using the + button for split distributions. You can split the salary by percentage across multiple Chartfields using the **Distrb%** field (the total must always add up to 100%) or between specific dates using the Start/End Date fields when required.
**Operating Budget Information**

3. Enter the **Budget Department** or use the **Look up** function to search
4. Enter the **Budget Amount**

**NOTE:** The **Budget Department** field should match the **Dept ID** in the chartfields and the **Budget Amount** should match the **Maximum Offer Amount**.

If the funding for the position is split between multiple departments, you can add additional rows by using the + sign.

Select **Salary Recovery** if a percentage of the salary will be funded from a project. Click yes and complete the **Recovery Funding Sources** information.

**Budget Comments**

5. Enter any comments in the **Budget Comments** section
6. Scroll to the top of the page and click **Save**
7. Click **Next**

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**Step 5: Job Posting**

**Posting Information**

1. Enter the **Job Posting Title**. This is the title that will appear on the job posting.
2. The **Recruiting Location** field defaults based on the Faculty/Unit and indicates the physical location of the job. This can be changed, if required, by clicking the **Look up** button.
3. Select the **Posting Location**

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4. Click the **Immediate Posting** option when you want the job posted as soon as possible. Alternatively, you can use the toggle to identify a specific posting date.

5. Enter the **Posting Length**. If left blank, Academic Rank opportunities will be posted as indicated in the attached job ad or for the minimum 30 days.

**Contacts**

*Under Contacts, enter those who should be associated with this job opening, meaning those individuals who require access to view the job opening and associated applicants in PeopleSoft.*

6. The **Primary Hiring Manager** will auto populate based on the Reports to Manager entered on the Job and Position Data page.

**Secondary Hiring Managers/Administrators**

7. If required, **Secondary Hiring Managers/Administrators** can be specified as well. Additional rows can be added by using the + sign for multiple people. Enter the **Empl ID** if known, or use the **Look up** to search by name.

*As indicated on the page, only those with the correct PeopleSoft security role will display for selection or entry into this field. If you have issues adding someone, please contact UService.*

**Notes/Comments**

8. In the **Notes/Comments** field, add any relevant notes or comments for those processing the request.

9. Click **Save**

10. Click **Next**
Step 6: Job Ad

Guidelines for Position Posting

1. Review the Guidelines for Position Posting information to ensure the prepared job ad meets the outlined requirements.

Attestation/Warning

2. Review and complete the Attestation by clicking the field to Yes

Add Document

3. Click Add Attachment to upload the job profile and any other related documents. Select My Device and navigate to the document you would like to upload, then select Upload and Done once the upload is complete.

   NOTE: If the request is for a new position using an existing job profile that has no changes, if the Job Profile Database Number is provided above, you are not required to upload a copy of the job profile.

4. Click Done once the upload is complete

5. Enter a Description for the attachment, or leave it blank and the document name will be added as the description.

6. Scroll to the top of the page and click Save

7. Click Next

   NOTE: If required, you can return to delete the current Job Ad and upload a revised version while the JOR is in Pending status.
Step 7: Summary and Submit

1. This page provides a summary of the request for your review. You can expand and collapse sections as needed to review and validate the information before submitting for approval. **NOTE:** Use the Previous and Next buttons or the section listing on the left of the screen to go back and make revisions if required.

2. Click Submit for Approval to start the approval process.

Step 8: Workflow

You will be taken to the Workflow page which displays the approvals required.
Next Steps

Once you have completed this transaction, the following will occur:

- Once approved, the job is posted on the UCalgary Careers website and the recruitment process begins.
- The Contacts identified will be notified by Human Resources once the job posting is created.
- Once the job is posted, applications can be viewed by the Hiring Manager(s) at any time. If requested, external advertising to UA and CAUT will be executed (once the account to be charged has been provided).

END OF REFERENCE GUIDE FOR NEW ACADEMIC RANK POSITION
Step 2A: Questions and Introduction

Questions

1. Provide your responses to the questions using the Instructions links provided for more information if you are unsure how to respond.

**NOTE:** You will only have access to position numbers within the Departments you have security access to and/or those within your reporting structure.

2. Click **Save** on the upper right of the page
Introduction

3. The Introduction page provides additional information and links to related resources. Review and click Next.

**NOTE:** You can navigate through the submission process by using the menu at the left of the screen or using the Previous and Next buttons located at the top right of the screen.
Step 3A: Job and Position Data – Existing Position Number

NOTE: The Job and Position Data page will auto-populate with information based off the position number entered on the Questions page.

Review the pre-populated information. If changes are required, you can make them in the New Information column on the right.

New Information – Existing Position Number

1. Select Full/Part Time from the drop-down menu.

2. The Standard Work Hours field defaults based on the standard hours for the job code indicated. Adjust the standard hours per week as necessary for part-time positions.

3. Select the Employee Classification from the drop-down menu.

   NOTE: The Employee Classification Help links to the Empl Class Quick Reference Sheet for more details on Empl Class options.

4. Funding Source will default for permanent positions. For Temporary or Limited Term positions, select from the drop-down menu.
   If One-Time is selected, enter the One Time Funding End Date

Job Related Information- Existing Position Number

5. Enter the Approximate Length of Term (in months) for all term positions.

6. Enter the Maximum Offer Amount (annualized), the annual budgeted amount for the role. The final salary offered cannot exceed this amount. Review the Max Offer Amount Help information for additional information.
7. Identify if there is a **Strong Internal Candidate** for the role. If Yes, enter the Employee ID or use the **Look up**.

8. Identify if this position is replacing an existing employee. If Yes, enter the Employee ID or use the **Look up** and select a **Replacement Reason** using the **Look up** feature. Add any additional context in the comments box provided.

**Position Rationale – Existing Position Number**

9. Summarize the business need for this role and identify where the budget to support the position is coming from in the **Position Rationale** section.

10. Scroll to the top of the page and click **Save**

11. Click **Next**
Step 4A: Budget

The Requested Job/Position Data at the top pulls information entered on the previous page for reference.

**Salary and Benefit Chartfield Information**

1. The accounting string will default based on the Department entered, however it can be edited as required. Click Edit ChartFields and review and validate the accounting.

2. Click Done

**NOTE:** Clicking the Edit ChartField button to review and validate the accounting is a required step.

Additional rows can be added by using the + button for split distributions. You can split the salary by percentage across multiple Chartfields using the Distrb% field (the total must always add up to 100%) or between specific dates using the Start/End Date fields when required.
Operating Budget Information

2. Enter the **Budget Department**. Use the **Look up** function to search
3. Enter the **Budget Amount**

**NOTE:** The **Budget Department** field should match the **Dept ID** in the chartfields and the **Budget Amount** should match the **Maximum Offer Amount**.

If the funding for the position is split between multiple departments, you can add additional rows by using the + sign

Select **Salary Recovery** if a percentage of the salary will be funded from a project. Click yes and complete the **Recovery Funding Sources** information.

**Budget Comments**

4. Enter any comments in the **Budget Comments** section
5. Scroll to the top of the page and click **Save**
6. Click **Next**
Step 5A: Job Posting

Posting Information

1. Enter the **Job Posting Title**. This is the title that will appear on the job posting.

2. The **Recruiting Location** field defaults based on the Faculty/Unit and indicates the physical location of the job. This can be changed, if required, by clicking the **Look up** button.

3. Select the **Posting Location**

4. Click the **Immediate Posting** option when you want the job posted as soon as possible. Alternatively, you can use the toggle to identify a specific posting date.

5. Enter the **Posting Length**. If left blank, Academic Rank opportunities will be posted as indicated in the attached job ad or for the minimum 30 days.

Contacts

*Under Contacts, enter those who should be associated with this job opening, meaning those individuals who require access to view the job opening and associated applicants in PeopleSoft.*

6. The **Primary Hiring Manager** will auto populate based on the Reports to Manager entered on the Job and Position Data page.
Secondary Hiring Managers/Administrators

7. If required, **Secondary Hiring Managers/Administrators** can be specified as well. Additional rows can be added by using the + sign for multiple people. Enter the **Empl ID** if known, or use the **Look up** to search by name.

*As indicated on the page, only those with the correct PeopleSoft security role will display for selection or entry into this field. If you have issues adding someone, please contact UService*

<table>
<thead>
<tr>
<th>Empl ID</th>
<th>Name</th>
<th>Email</th>
<th>Telephone</th>
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Notes/Comments

8. In the Notes/Comments field, add any relevant notes or comments for those processing the request.

9. Click **Save**

10. Click **Next**

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**Step 6A: Job Ad**

**Guidelines for Position Posting**

1. Review the **Guidelines for Position Posting** information to ensure the prepared job ad meets the outlined requirements.

**Attestation/Warning**

2. Review and complete the **Attestation** by clicking the field to **Yes**

**Add Document**

3. Click **Add Attachment** to upload the job profile and any other related documents. Select **My Device** and navigate to the document you would like to upload, then select **Upload** and **Done** once the upload is complete.

**NOTE:** If the request is for a new position using an existing job profile that has no changes, if the Job Profile Database Number is provided above, you are not required to upload a copy of the job profile.
3. Click **Done** once the upload is complete

![File Attachment](image)

4. Enter a **Description** for the attachment, or leave it blank and the document name will be added as the description.

![Add Document](image)

4. Scroll to the top of the page and click **Save**
5. Click **Next**

**NOTE:** If required, you can return to delete the current Job Ad and upload a revised version while the JOR is in Pending status.

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**Step 7A: Summary and Submit**

1. This page provides a summary of the request for your review. You can expand and collapse sections as needed to review and validate the information before submitting for approval.

**NOTE:** Use the **Previous** and **Next** buttons or the section listing on the left of the screen to go back and make revisions if required.

2. Click **Submit for Approval** to start the approval process.

![Submit for Approval](image)
Step 8A: Workflow
You will be taken to the Workflow page which displays the approvals required.

Next Steps
Once you have completed this transaction, the following will occur:

- Once approved, the job is posted on the UCalgary Careers website and the recruitment process begins.
- The Contacts identified will be notified by Human Resources once the job posting is created.
- Once the job is posted, applications can be viewed by the Hiring Manager(s) at any time. If requested, external advertising to UA and CAUT will be executed (once the account to be charged has been provided).

END OF REFERENCE GUIDE FOR ACADEMIC RANK EXISTING POSITION