

## Recruit for a New MaPS or AUPE Research Employee (Fixed Term)

### Purpose

Use this job aid to create, post for and hire a new MaPS or AUPE employee funded from a research project (Fixed Term).\*

1. **\*NOTE:** Although the majority of Fixed Term jobs are not positioned in PeopleSoft, position numbers are assigned to Fixed Term jobs when the role has direct reports.

If a position already exists for the job you are hiring, ensure you hire into the existing position number rather than creating a new position. If you are hiring into an existing position you can follow either the [Fill a Vacant MaPS or AUPE Research Manager/Supervisor Position](#) or [Fill a Vacant MaPS or AUPE Research Manager/Supervisor Position \(changes to position information required\)](#) job aids.

The purpose of the Job Opening Request form is to collect the information required to post the job, obtain the necessary approvals in preparation for selecting an appropriate candidate, and, where necessary, assign the role a position number.



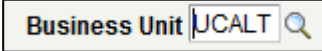
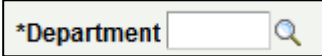
|              |  |
|--------------|--|
| <b>Note:</b> | If you need help selecting the right appointment type, view the <a href="#">Research Staff – Employment Type Summary</a> , which provides detailed information about appointment types that are funded from research project accounts, including information on recruitment requirements, benefits, etc. |
|--------------|--|

### Prerequisites

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

- Upfront conversations with project budget owners and, if applicable, Research Accounting, to verify the budget exists for the role. Also ensure you obtain the project account string.
- The job profile for this position has been created or updated.
- The job profile has been sent to HR. Once the job profile is reviewed and the appointment is classified and assigned a Job Code, HR will provide you with the classification, **including the Job Code** that should be used to hire the job.


**Once the prerequisite steps are complete, you are ready to initiate a Job Opening Request Form following the steps below:**

|                                | Step | Action   |
|--------------------------------|------|--|
| Access PeopleSoft              | 1.   | <p>Begin by logging into the <b>myUofC</b> portal:</p> <ul style="list-style-type: none"> <li>From the mega-menu, click the <b>My work</b> tab.</li> <li>Click the <b>Job opening request</b> link under the <b>People management</b> heading.</li> </ul>  |
| Initiate a Job Opening Request | 2.   | <ul style="list-style-type: none"> <li>For this example, we will be initiating a new transaction. Click the <b>Add</b> button.            </li> <li>Click the <b>Request Type</b> dropdown list. The <b>Request Type</b> chosen drives which fields on the form open up for entry.            </li> <li>In this example we are hiring a new Fixed Term positioned job, so you will select <b>New Job/Position</b>.</li> </ul>  |
| Enter Position Information     | 3.   | <ul style="list-style-type: none"> <li>Because this is a project-funded job, enter <b>UCALT</b> in the <b>Business Unit</b> field.            </li> <li>Enter the five-digit <b>Department ID</b> (i.e. the department number under which the position/job resides). If you do not know the home <b>Department ID</b>, you can use the <b>Look Up</b> button and search for it using the <b>Description</b> field.            </li> </ul> <p><b>NOTE!</b> The <b>Faculty/Unit</b> information auto-populates based on the <b>Department</b> selection.</p> |

# Job Opening Request

## Enter Position Information

- The **Job Code** is provided to the Initiator by the HR Compensation Analyst through the job profile classification process. Enter the 6 digit **Job Code** next.

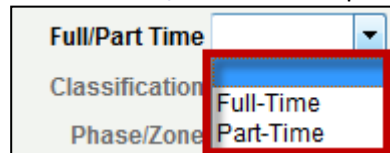
**NOTE!** Upon entering the **Job Code**, the **Job Family, Classification, Phase/Zone** and **Salary Range** fields auto-populate.

- In the **Reports To Position** field, enter the Reports to Manager's position number.

**NOTE!** Position number should not be confused with Employee ID number. If you do not know the Reports to Manager's position number, you can use the **Look Up** button and search for it using the Reports to Manager's name.

- Click the **Full/Part Time** dropdown and make your selection.



- The **Std Hrs/Wk** field defaults based on the standard weekly hours for the **Job Code** selected. **Adjust the standard hours per week as necessary for part-time positions.**

**NOTE!** When hiring a Recurring Part-time employee, enter Part-time in the **Full/Part Time** field, but leave **Std Hrs/Wk** as full-time weekly hours (i.e. 35 or 37.5).


- The **Position 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.

- If the role will have direct reports, click the checkbox provided.


**Enter Job Information**

4.


- Employee Classification (Empl Class)** is required for all project-funded jobs. Click the **Look Up** button and select the appropriate **Empl Class**.

Employee Classification  

**NOTE!** For more detail regarding Empl Class options, see the [Empl Class Quick Reference Sheet](#).
- Enter the **Length of Term** which is a required field for all Fixed Term jobs. If known, enter the **Expected Job End Date**.


Length of Term (if applicable)   
 Expected Job End Date (if applicable)  

**NOTE!** The initial term for Fixed Term jobs cannot exceed five (5) years.
- Enter the Project End Date**, which is a required field for all project-funded jobs.


Project End Date (if applicable)  


**NOTE!** The **Expected Job End Date** of the job cannot surpass the end date of the project.
- The **Maximum Offer Amount** is the maximum annualized budgeted salary amount for the role. Include this if the max salary you have budgeted is below the top of the salary band for the job (indicated in the **Position Information** section).

Maximum Offer Amount (Annual)  \$0.00
- If there is a **Strong Internal Candidate**, check this box and fill in the **Empl ID** of the candidate.

Strong Internal Candidate:  Empl ID  

**NOTE!** Jobs with strong internal candidates will be posted for 7 days on the Internal Careers site only.
- If applicable, enter the employee ID number (UCID) of the **Employee Being Replaced** and indicate the **Replacement Reason** from the list of options provided.

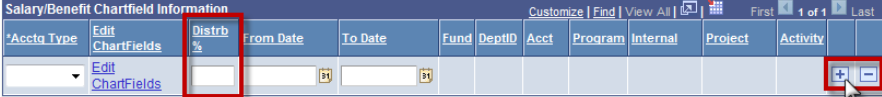
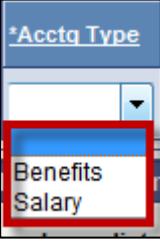
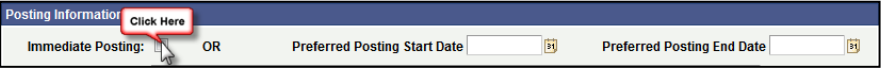
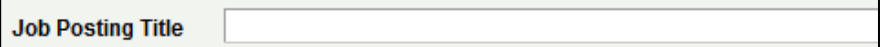
Employee Being Replaced  

Replacement Reason  

**Edit Salary  
/Benefit  
Chartfield  
Information**


| Step                 | Action   |                      |                      |                      |                      |                                  |                      |                      |        |      |             |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |
|----------------------|--|----------------------|----------------------|----------------------|----------------------|----------------------------------|----------------------|----------------------|--------|------|-------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
|                      | <ul style="list-style-type: none"> <li>Enter in the schedule for this job in the <b>Schedule</b> section. Enter the <b>Hours/Day</b> and the associated <b>Start Time</b> under the appropriate days. As you enter hours, the <b>Total Hours/Week</b> field auto-calculates.</li> </ul> <div data-bbox="545 478 1422 606" style="border: 1px solid black; padding: 5px;"> <p><b>Schedule</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;"></th> <th style="width: 10%;">Sun</th> <th style="width: 10%;">Mon</th> <th style="width: 10%;">Tue</th> <th style="width: 10%;">Wed</th> <th style="width: 10%;">Thu</th> <th style="width: 10%;">Fri</th> <th style="width: 10%;">Sat</th> <th style="width: 10%;"></th> </tr> </thead> <tbody> <tr> <td>Hours/ day:</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td>Total Hours/week</td> </tr> <tr> <td>Start Time(i.e. 4PM)</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table> </div> <p><b>NOTE!</b> The <b>Hours/day</b> and <b>Total Hours/week</b> should not exceed the standard hours for that job family.</p> <p><b>NOTE!</b> For Recurring Part-time positions, the <b>Schedule</b> section is not required.</p>  |                      | Sun                  | Mon                  | Tue                  | Wed                              | Thu                  | Fri                  | Sat    |      | Hours/ day: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | Total Hours/week     | Start Time(i.e. 4PM) | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
|                      | Sun  | Mon                  | Tue                  | Wed                  | Thu                  | Fri                              | Sat                  |                      |        |      |             |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |
| Hours/ day:          | <input type="text"/>   | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/>             | <input type="text"/> | Total Hours/week     |        |      |             |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |
| Start Time(i.e. 4PM) | <input type="text"/>   | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/>             | <input type="text"/> | <input type="text"/> |        |      |             |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |
| 5.                   | <ul style="list-style-type: none"> <li>Under the <b>Salary/Benefits ChartField Information</b> section, enter the accounting string from which the position will be paid.</li> <li>Click the <b>Edit ChartFields</b> link.</li> </ul> <div data-bbox="545 940 876 1102" style="border: 1px solid black; padding: 5px;"> <p><b>Salary/Benefit Chartfield Inform</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">*Acctg Type</th> <th style="width: 40%;">Edit ChartFields</th> <th style="width: 30%;">Distrib %</th> </tr> </thead> <tbody> <tr> <td>Salary</td> <td><a href="#">Edit ChartFields</a></td> <td>100.000</td> </tr> </tbody> </table> </div> <ul style="list-style-type: none"> <li>Enter the following fields:             <ul style="list-style-type: none"> <li><b>Fund</b> - always required</li> <li><b>DeptID</b> - always required</li> <li><b>Acct</b> - always required and will be 54995 for salaried Fixed Term jobs (the exception is Recurring Part-time (hourly), for which the actual account number should be used).</li> <li><b>Program / Internal</b> - only if applicable</li> <li><b>Project and Activity ID</b> - always required for jobs funded from projects</li> </ul> </li> </ul> <div data-bbox="545 1507 1422 1591" style="border: 1px solid black; padding: 5px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">Fund</th> <th style="width: 15%;">DeptID</th> <th style="width: 15%;">Acct</th> <th style="width: 15%;">Program</th> <th style="width: 15%;">Internal</th> <th style="width: 15%;">Project</th> <th style="width: 15%;">Activity ID</th> </tr> </thead> <tbody> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table> </div> <p><b>NOTE!</b> Do NOT enter a <b>Combination Code (Combo Code)</b>. Enter the <b>ChartFields</b> and the system will populate the correct <b>Combo Code</b> based on your entries.</p> <ul style="list-style-type: none"> <li>Once the chartfield has been entered and verified, click the <b>OK</b> button.</li> </ul> | *Acctg Type          | Edit ChartFields     | Distrib %            | Salary               | <a href="#">Edit ChartFields</a> | 100.000              | Fund                 | DeptID | Acct | Program     | Internal             | Project              | Activity ID          | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |                      |                      |                      |                      |                      |                      |                      |
| *Acctg Type          | Edit ChartFields   | Distrib %            |                      |                      |                      |                                  |                      |                      |        |      |             |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |
| Salary               | <a href="#">Edit ChartFields</a>   | 100.000              |                      |                      |                      |                                  |                      |                      |        |      |             |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |
| Fund                 | DeptID   | Acct                 | Program              | Internal             | Project              | Activity ID                      |                      |                      |        |      |             |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |
| <input type="text"/> | <input type="text"/>   | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/>             |                      |                      |        |      |             |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |                      |

**Adding additional rows for split distribution**

| Step | Action   |
|------|--|
| 6.   | <ul style="list-style-type: none"> <li>Additional rows can be added by using the + sign for split distributions. You can split the salary by percentage across multiple <b>ChartFields</b> using the <b>Distrb%</b> field (the total must always add up to 100%) or between specific dates using the <b>From/To Date</b> fields when required.</li> </ul>  <ul style="list-style-type: none"> <li>In situations where benefits must be charged to a <b>different project</b> than the salary, use the Accounting Type (<b>Acctg Type</b>) dropdown menu to identify which account should be used for benefits and which should be used for salary.</li> </ul>  <p><b>NOTE!</b> Separate benefit accounting should only be entered when it is different from the salary account. If no benefit line is entered, it is assumed benefits costs are to be charged to the salary account.</p> |
| 7.   | <ul style="list-style-type: none"> <li>Click the <b>Immediate Posting</b> option when you want the job posted as soon as possible when received by HR. Alternatively, you can define start and end dates for posting. If not specified, HR will post the job immediately for the standard two weeks (unless a <b>Strong Internal Candidate</b> was identified, in which case it would be posted for one week).</li> </ul>  <ul style="list-style-type: none"> <li>Enter the title you would like displayed on the job posting into the <b>Job Posting Title</b> field.</li> </ul>    |

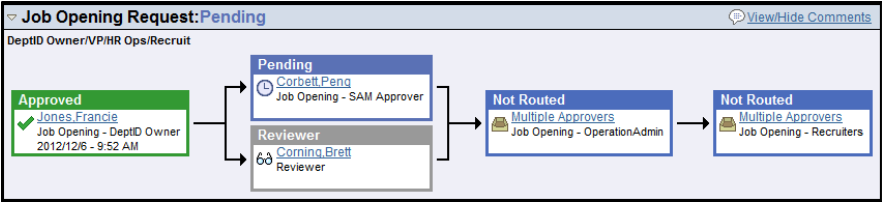
**Edit Posting Information**

| Step   | Action  |                      |                      |               |       |   |                      |                      |                      |
|--|---|----------------------|----------------------|---------------|-------|---|----------------------|----------------------|----------------------|
| <p><b>Edit Posting Information</b></p>         | <ul style="list-style-type: none"> <li>The <b>Job Profile Identifier</b> field is used to enter the Job Profile number for the associated job profile. Enter the Job Profile number provided to you into the <b>Job Profile Identifier</b> field. If no Job Profile number exists, copy and paste the job profile into the <b>Summary of Key Responsibilities/Posting Details</b> section below.                     <div data-bbox="545 548 1089 600" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <b>Job Profile Identifier</b> <input type="text"/> </div> </li> <li>The <b>Recruiting Location</b> field defaults based on the faculty/unit entered prior and indicates the physical location of the job. This can be changed, if required, by clicking the <b>Look Up</b> button.                     <div data-bbox="545 747 1146 852" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <b>Recruiting Location</b> <input type="text" value="1001"/> <span>Click Here</span> Main Campus                 </div> </li> <li>If you would like specific information included in the job posting (i.e. a description of your department or research project), or you would like to highlight key information from the job profile that should be included, note it within the <b>Summary of Key Responsibilities/Posting Details</b> field.                     <div data-bbox="545 1037 1398 1205" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p><b>Summary of Key Responsibilities/Posting Details</b></p> <p><small>Note: Key responsibilities for the posting will be taken from the first 5 to 8 points from the primary purpose and responsibilities in your job profile. If this does not reflect the areas of key responsibilities, or if there is no job profile for this position, please provide us with information you would like presented in the job posting.</small></p> <div style="border: 1px solid gray; border-radius: 15px; padding: 5px; display: inline-block; margin-top: 10px;">                         Please highlight.....                     </div> </div> </li> </ul> |                      |                      |               |       |   |                      |                      |                      |
| <p><b>Enter Contacts, Notes / Comments</b></p> | <p>8.</p> <ul style="list-style-type: none"> <li>Under <b>Contacts</b>, 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.</li> </ul> <div data-bbox="545 1415 1422 1598" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p><b>Contacts</b></p> <p>*Primary Hiring Manager <input type="text"/> <input type="text"/></p> <p>Email Address <input type="text"/> Phone <input type="text"/></p> <p>Secondary Hiring Managers/Administrators <span style="float: right;">Customize   Find   View All   1 of 1   First   Last</span></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Empl ID</th> <th>Display Name</th> <th>Email Address</th> <th>Phone</th> </tr> </thead> <tbody> <tr> <td>1</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table> </div>   | Empl ID              | Display Name         | Email Address | Phone | 1 | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Empl ID  | Display Name  | Email Address        | Phone                |               |       |   |                      |                      |                      |
| 1  | <input type="text"/>  | <input type="text"/> | <input type="text"/> |               |       |   |                      |                      |                      |

| Step                             | Action   |
|----------------------------------|--|
| Enter Contacts, Notes / Comments | <ul style="list-style-type: none"> <li>The <b>Reports to Manager</b> should be entered as the <b>Primary Hiring Manager</b>. If you know the <b>Empl ID</b> of the <b>Reports to Manager</b>, simply enter this here. Otherwise, click the <b>Look Up</b> button and search by name. <ul style="list-style-type: none"> <li>The email will auto-populate, but the phone number does not, so enter it in the <b>Phone Number</b> field.</li> <li>If required, <b>Secondary Hiring Manager(s)</b> can be specified as well. Additional rows can be added by using the + sign for multiple Secondary Hiring Managers.</li> </ul> <p><b>NOTE!</b> Only those with the correct security role will display for selection or entry into this field.</p> </li> <li>In the <b>Comments</b> field, add any additional notes or comments about the request – either for the approvers or those processing the request. As an example, you could enter special requests or ask for external advertising (include the account string the expense will be charged to).</li> </ul> <div data-bbox="496 1010 1419 1115" style="border: 1px solid black; padding: 5px;"> <p><b>Notes/Comments</b></p> <p><small>Use this section to provide clarification on the intent of the request and/or additional relevant information (e.g. outlining the rationale for the change; identify the applicable funding source if budget adjustments are required; any external advertising required).</small></p> </div> |
| Click Save                       | <p>9.</p> <ul style="list-style-type: none"> <li>At any point, you can click the <b>Save</b> button to save the request and return later to complete and submit the form.</li> </ul> <div data-bbox="542 1213 656 1262" style="border: 1px solid black; padding: 2px; display: inline-block;">  Save </div>   |
| Click Begin Approvals            | <p>10.</p> <ul style="list-style-type: none"> <li>Once you have completed all required fields and saved the form, click <b>Begin Approvals</b> to start the automated approval process.</li> </ul> <div data-bbox="542 1381 813 1430" style="border: 1px solid black; padding: 2px; display: inline-block;"> Begin Approvals </div> <ul style="list-style-type: none"> <li>Click the <b>Job Opening Approvals</b> link. <a href="#">Job Opening Approvals</a></li> <li>The <b>Job Opening Approval</b> workflow displays the status of the request as <b>Pending</b>. This page allows initiators to monitor the progress of their requests. The status remains <b>Pending</b> until all approvers have approved the request, at which point, the status changes to <b>Approved</b>.</li> </ul>  |



Click **Begin Approvals**

| Step                     | Action   |
|--------------------------|--|
|                          | <ul style="list-style-type: none"> <li>Required approvals are shown in blue in the approval workflow, and display as <b>Pending</b> or <b>Not Yet Routed</b> when the form is first submitted. Reviewers are shown in grey, and receive notification of the request, but are not required to approve the transaction.</li> </ul>  <p><b>NOTE!</b> If a correction to the information on the form is required after it has been submitted for approval, the Initiator can click <b>Retract</b> to stop the approval workflow and open up the form for editing.</p> <div style="border: 1px solid black; background-color: yellow; padding: 2px; display: inline-block; margin: 5px 0;">Retract</div> <p>Once the necessary changes are made, the Initiator should repeat steps 9 and 10 to start the approval process from the beginning.</p> |
| <b>End of Procedure.</b> |  |

## Results

Completion of this transaction results in the following:

- Job Opening Request is saved and submitted for approval
- Generation of a Job Opening **Request ID** (which can be used for tracking purposes)

## 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 initiator and Reports to Manager will be notified by HR once the job posting is created
- Once the job is posted, applications can be viewed by the Hiring Manager(s) at any time, but they will be prompted to review the applicants once the posting closes. For information on how to view applicants in PeopleSoft, please refer to the [Managing Applicants in PeopleSoft](#) quick reference guide.