

## 9.2 Position Management - Fluid (New, Clone, & Updates)

**Purpose:** Position Management, using Fluid tiles in ctcLink, includes the ability to create, manage and clone (copy) positions. Users will also have the ability to add effective sequencing and view history of updates made to positions in a similar fashion to Job Data updates.

**Audience:** HR Administrators, Workforce Administrators.


### Position Management - Fluid (New, Clone, & Updates)

 To expand a section, select the chevron (>) to the left of the heading.

### Creating a New Position

#### Navigation: Workforce Administration Fluid Homepage

1. Select **Position Management** tile. Next, select the **Manage Position** tile.
3. The Manage/Create Position page displays.
4. You may start a new position request and/or search for existing positions. (The example in this QRG will focus on creating a new position).
5. Select the **Add** button.
6. The Create Position pagelet displays.
7. Positions are auto numbered. *There is no need to change or update the default Position Number on this page.*
8. The **Effective Date** is the date that will be used in the system as the start point for that position. If a position is expected to be requested but not used until the next calendar year, the date should be updated to reflect that timing. For example, 1/1/2021.
9. Select the **Continue** button.

 The **Activity Guide**, for this process (outlined on the left side of the screen), will walk you through the main five (5) steps of this process:

- **Position Data**

- **Specific Information**
- **Attachments**
- **Budget Incumbents**
- **Review and Submit**

When following the steps, the system will automatically move forward to the next step once the **Next** button is selected. You will be able to track where you are in the process by reviewing the Activity Guide. For example, in the screen below, you can see that step 1 (Position Data) has been "visited", but not complete. Step 2 (Specific Information) shows that it has not been started, etc.

10. You will be directed to the **first step of the Activity Guide**. (Required fields are indicated by an asterisk).
11. The **CTC Budget** subsections and the **CTC Position Information** section are custom fields, you have the option to identify up to three (3) budgets for position funding allocation. (Open CTC Budget #2 by selecting the **arrow** next to CTC Budget #2, the same for CTC Budget #3 if needed).
12. At least one budget must be identified and all of that budget's fields are required for an entered budget.
13. Within the **CTC Position** fields, add any supporting text that is required to justify the position request. If full documents are required, there is an attachments section that may be used as well.
14. Enter **Business Unit, Company** and **Department** (or use magnifying glass look up icon), these are required fields.
15. When all required fields are complete, select the **Next** button to move forward in the process.

**Create Position**

Position Number 00000000  
Headcount Status Open  
Current Head Count 0

**Next >**

**1 Position Data**  
Visited

**2 Specific Information**  
Not Started

**3 Attachments**  
Not Started

**4 Budget Incumbents**  
Not Started

**5 Review and Submit**  
Not Started

**Step 1 of 5: Position Data**

Effective Date 12/06/2020  
Effective Sequence 0

Reason Code NEW New Position  
Approval Status Not Available

**Position Information**

\*Filed Status   
\*Status   
Action Date 12/06/2020  
Key Position ☐ No  
Budgeted Position ☒ Yes  
Confidential Position ☐ No

Max Head Count   
Status Date 12/06/2020  
Job Sharing Permitted ☐ No  
Available for Telework ☐ No

**Job Information**

\*Business Unit HR890 SBCTC  
\*Full/Part Time

**1 Position Data**  
Visited

**2 Specific Information**  
Not Started

**3 Attachments**  
Not Started

**4 Budget Incumbents**  
Not Started

**5 Review and Submit**  
Not Started

\*Job Code   
\*Regular/Temporary   
\*Regular Shift Not Applicable  
\*Title

Union Code   
Short Title   
Description

**CTC Budget #1**

\*Name   
\*Funding Source   
\*Number   
\*Percent 0.000

**CTC Budget #2**

**CTC Budget #3**

**CTC Position Information**

Project End Date   
Minimum Salary   
Can Position Be Filled Quarterly ☐ No  
Position Required by Accreditation or ☐ No

16. You will be directed to the second step of the **Activity Guide**.
17. At any point in the process, you can navigate to previously accessed steps by selecting **Previous** or by using the links that are active on the left of the screen. **Please note that you cannot jump ahead in the process until they complete the prior steps.**
18. While the **FTE** is a delivered field, and does not show an \* indicating it is required, it **DOES NEED TO BE COMPLETED**.
19. Select the **Next** button.
20. You will be directed to the third step of the **Activity Guide**.
21. You may include any pertinent attachments that are part of the position request detail or background.
22. Select the **Next** button.
23. You will be directed to the fourth step of the **Activity Guide**.

24. You may review budgeted incumbent information related to the position. *It is only pertinent to update incumbents if you are working on managing or updating an existing position with a current incumbent.*
25. Select the **Next** button.
26. You will be directed to the last step in the **Activity Guide**.
27. You may review the summary information related to what has been added in prior steps.
28. To submit the request, select the **Submit** button.
29. You will be directed to the **Submission Confirmation** page for the position.
30. The Position Confirmation page displays.
31. If approvals are required for the college/entity, you will see the routing of the approval for the request to the one-to-many potential approvers. If no approvals are required, the position is created as approved and active as the entered effective date.



**NOTE:** if approvals are required, the position will NOT be active until all approvals have been completed.

32. This is the last step for the initiating user unless there is push back and changes within the approvals.
33. To submit the request, select the **Submit** button.
34. The reviewing manager name will appear in the Evaluation Approval Chain section.  
Approver has to approve the request through the MSS (Manager Self Service) Approval tile.  
For more information, refer to the QRG (Quick Reference Guide) titled [9.2 Request Approval Process in Fluid](#).

**Position Confirmation**

✓ The New Position Number 00007647 has been successfully submitted for approval.

Position Number 00007647  
Headcount Status Open  
Current Head Count 0 of 1

**Create Position**

▼ New Position Pending

**Edmonds Position Request**

⌚ Pending

Edmonds HR  
Edmonds HR Office

Go to Position Details Go to Manage/Create Position Go to Position Management

**Process complete.**

# Cloning (Copying) a Position

**Navigation: Workforce Administrator Fluid Homepage > Position Management tile**

1. Select the **Manage Position** tile.
2. The **Manage Position** page displays.
3. Search for existing **Position Number** by entering a **%** in the Position Number field to bring up all positions with titles (NOTE: Do not use Reports To Position Number field).
4. Select the **Search** button.
5. The View Manage/Create Position results display to the right.
6. Select desired **Position Number** from listing you wish to copy/clone.

**View Manage/Create Position**  
100 results found.

Position Number	Description	Reports To	Business Unit	Company	Department	Status	Job Code	Current Head Count
00001450	HEAD START CENTER MANAGER		HR170	170	99005	Active	111103	0/1
00003120	FOOD SERVICE WORKER		HR170	170	99005	Active	40102	0/1
00003165	CHILD CARE AIDE II		HR170	170	99005	Active	40201	0/1
00003408	CHILD CARE SPECIALIST		HR170	170	99005	Active	40903	1/1
00002974	CHILD CARE SPECIALIST		HR170	170	99005	Active	40903	1/1
00003164	CHILD CARE AIDE II		HR170	170	99005	Active	40201	0/1
00001800	SOCIAL WORK ASSISTANT 2		HR170	170	99005	Active	00343I	0/1
00003407	FOOD SERVICE WORKER		HR170	170	99005	Active	40102	1/1
00003410	CHILD CARE AIDE II		HR170	170	99005	Active	40201	1/1

7. The Position Details page displays.
8. Select the **Clone** button.
9. The Clone pagelet displays.
10. Make no changes to **Position Number**.
11. Make needed changes to **Effective Date**.
12. Select **Continue**.
13. The **Activity Guide** opens.
14. Make needed updates, selecting **Next** to move through Activity Guide.
15. **NOTE:** If no changes are needed due to cloning only, continue to select **Next** until you are at **Step 5 of 5: Review and Submit**.
16. When complete, select **Submit**.
17. A new Position Number will automatically be assigned when saved.

**Process to Clone a Position is now complete.**

## Updating a Position

**Navigation: Workforce Administrator Fluid Homepage > Position Management tile**

1. Select the **Manage Position** tile.
2. The Manage/Create Position page displays.
3. Search for existing **Position Number** by entering a **%** in the **Position Number field** to bring up all positions with titles (NOTE: Do not use Reports To Position Number field).
4. Select the **Search** button.
5. Select **Position Number** for position you would like to update.
6. The Position Details page displays.
7. To update the position, select the **plus (+) button** to add a row.
8. If correcting history and making edits, select the **editing pencil icon**.
9. The Request Details pagelet displays.
10. Change **Effective Date** if needed.
11. Select a **Reason Code**, using the magnifying glass lookup icon for a drop-down listing.
12. Select **Continue**.
13. Make any necessary updates and move through Activity Guide by selecting the **Next** button.
14. Select **Submit** when complete.

**Process complete.**

## Video Tutorial

The video below demonstrates the process actions described in steps listed above. There is no audio included with this video. Select the play button to start the video.

## Video Tutorial via Panopto

View the external link to **Position Management - Fluid (New, Clone, & Updates)**. This link will open in a new tab/window.