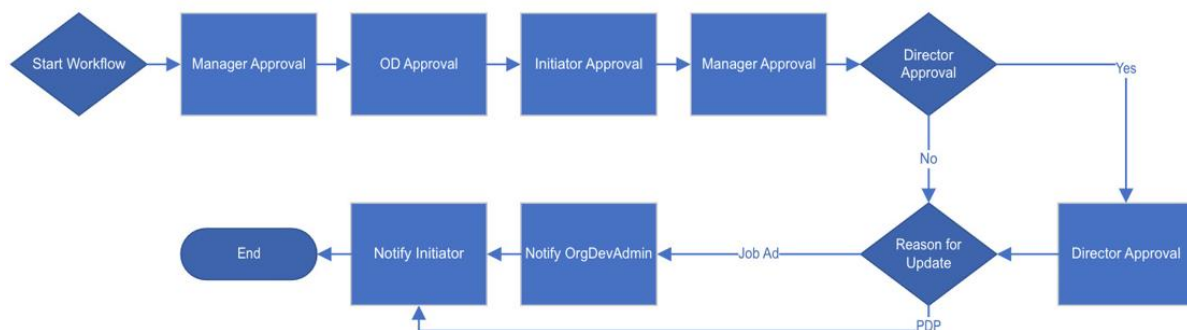


How to Submit and Approve a Position Description in Objective ECM

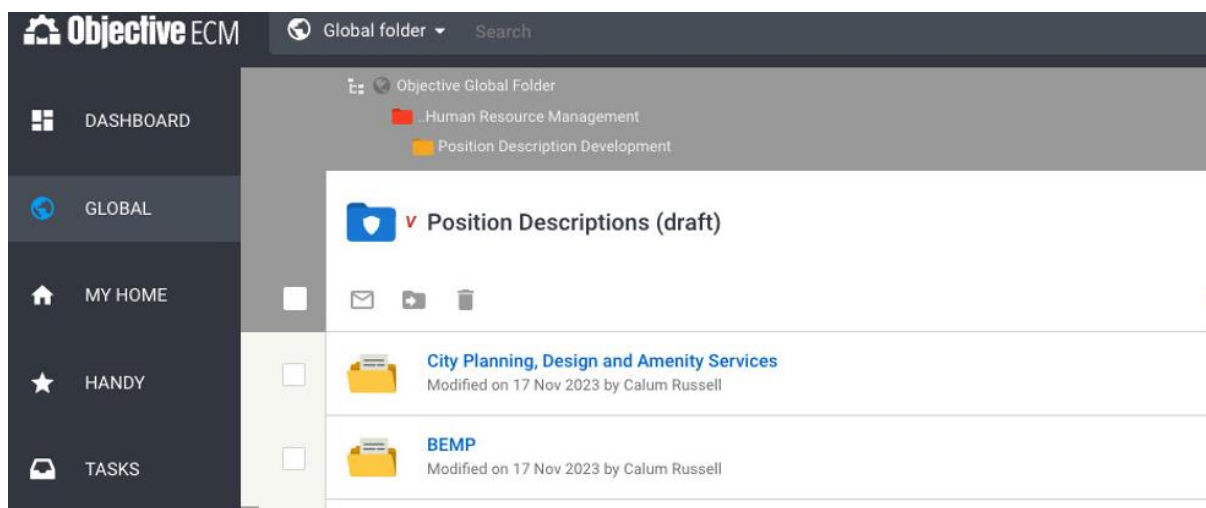
This guide helps you submit and approve a position description (PD) step by step. Follow these easy steps to ensure the PD is approved by the right people. It simplifies the process and makes sure everything is done correctly.

Various stakeholders are involved in the approval process of a Position Description (PD), and their involvement depends on the specific purpose for which the PD is required. Please ensure you review the Source (link) for information on who needs to approve your position description BEFORE commencing this process.

Tip: The following workflow offers a simplified, high-level overview of the position description approval process. Detailed instructions follow to provide clarity and guidance.



1. Staff member (Initiator) uploads PD into Objective Global Folder > Human Resources Management > Position Description Development > Position Descriptions (draft) > Specific Directorate.



2. Edit the document in the usual way.

Please note – You can edit the document all through the approval workflow process. When you close the document **DO NOT** Submit for approval (this will start the approval workflow)



RELEASE FROM EDIT



SELECTED



Information Systems Analyst - May 2023.docx

REASON FOR NEW VERSION

☐

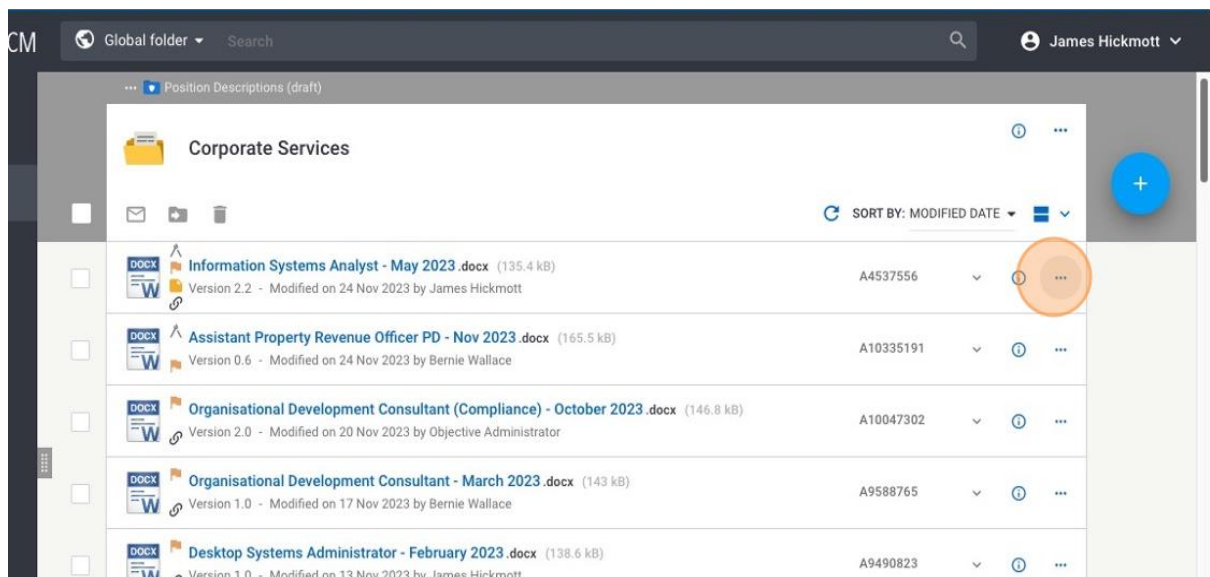
Set corporate value

KEEP IN EDIT

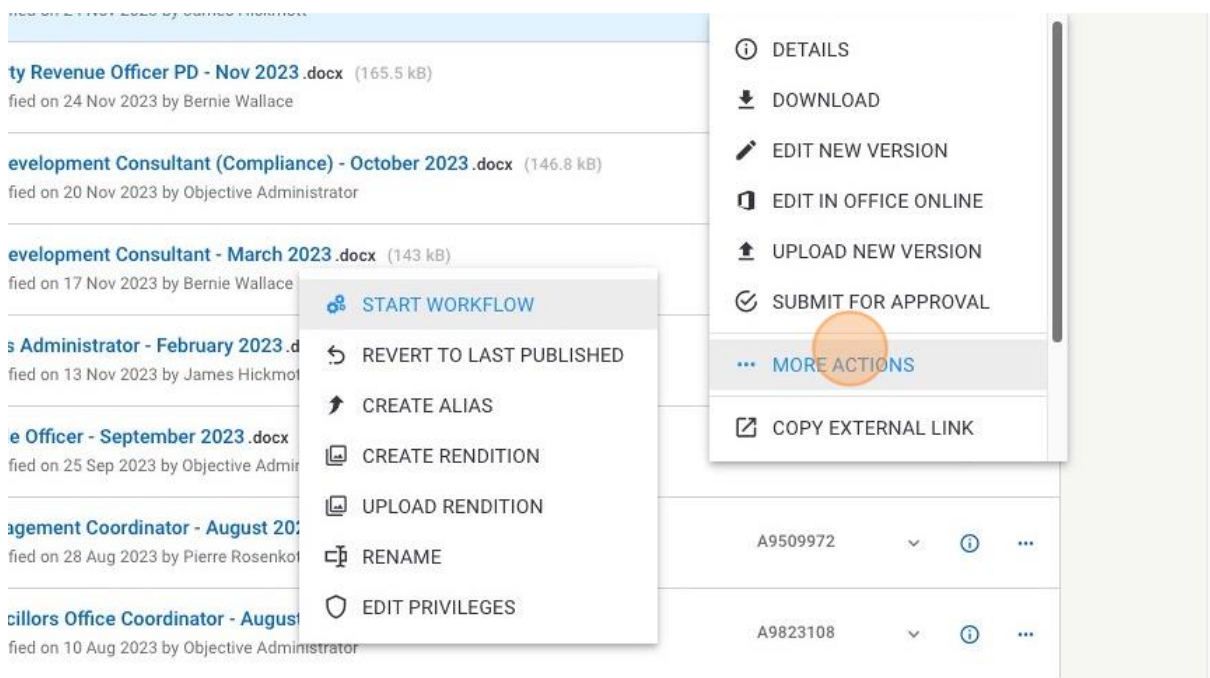
RELEASE

3. When the PD is ready to be released the **Initiator** can Submit for approval.

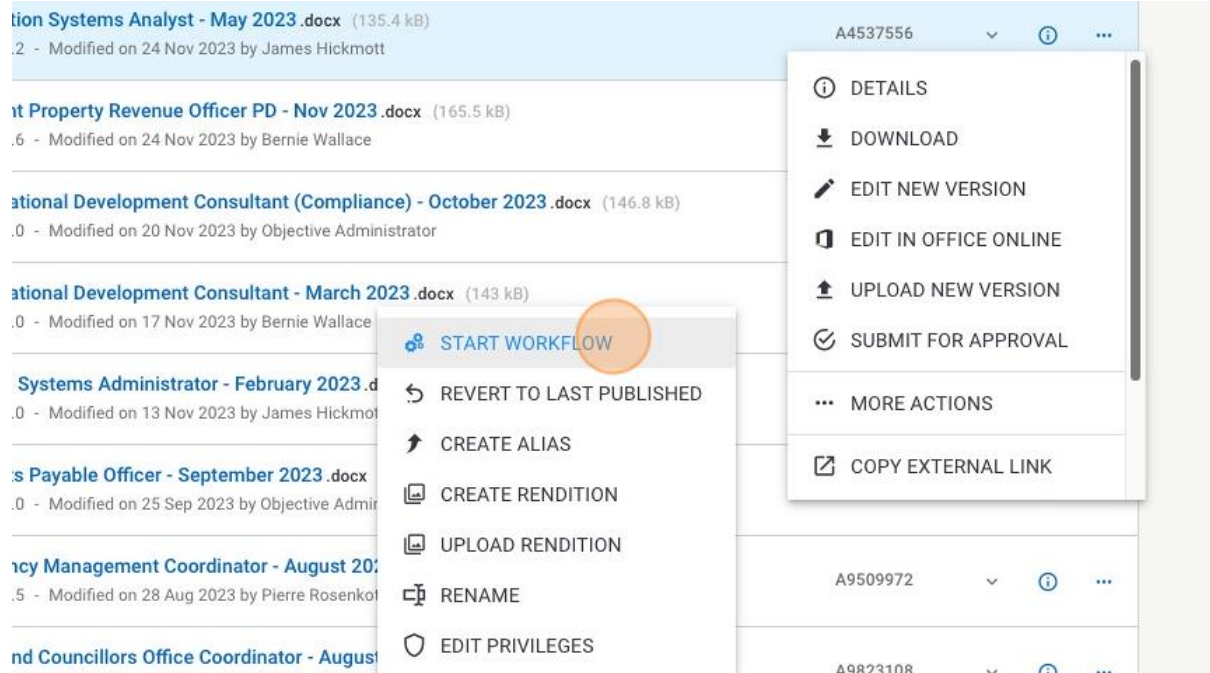
4. Click the 3 dots next to the PD document



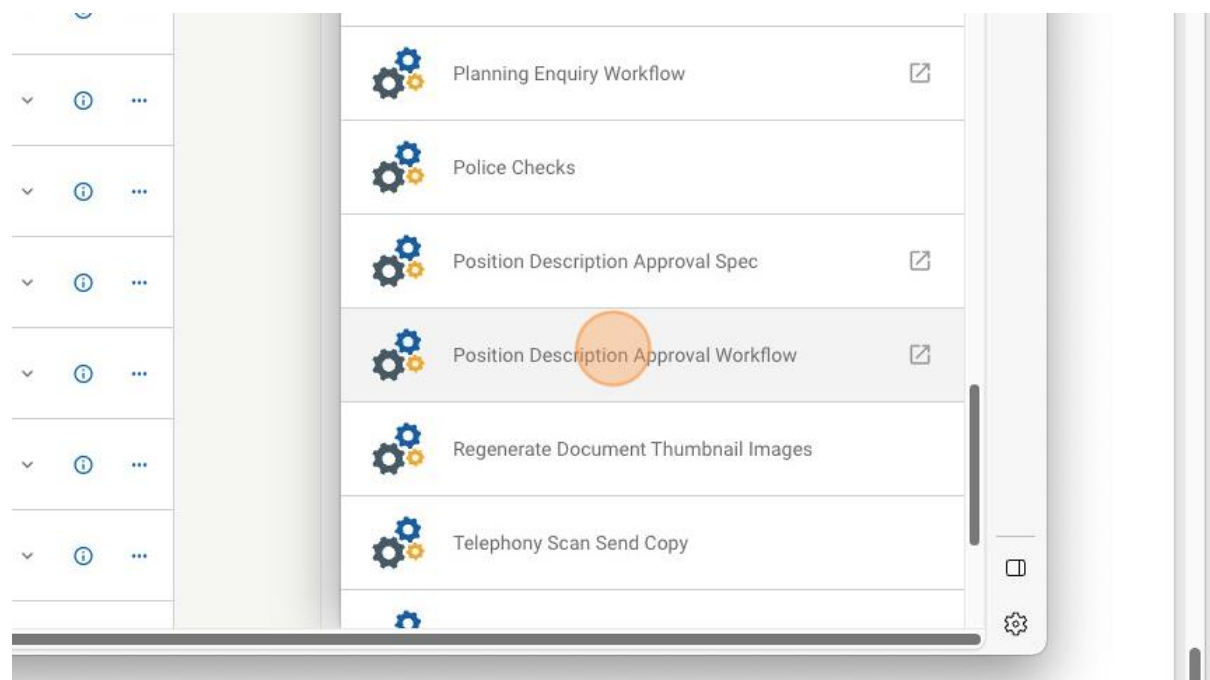
5. Click on MORE ACTIONS



6. Click on START WORKFLOW



7. Click "Position Description Approval Workflow"



8. Enter Position Number. Position numbers can be found on the Organisational Chart on the Source. (if the PD is for the recruitment of a new role enter 1234).

ROLES

Organisation Development

Position Description Approvers gA1072 x

FIELDS

Position Number *

Reason for PD update *

Manager Approval *

Name begins with...

Director

Select a value

9. Select the Reason for the position description update (note this is a drop-down menu)

FIELDS

Position Number *

1234

Reason for PD update *

Please Select

PDP

Job Ad

Rebanding

10. Enter the Managers name for approval (note this is a drop-down menu)

FIELDS

Position Number *

1234

Reason for PD update *

Job Ad

Manager Approval *

James

3 RESULTS

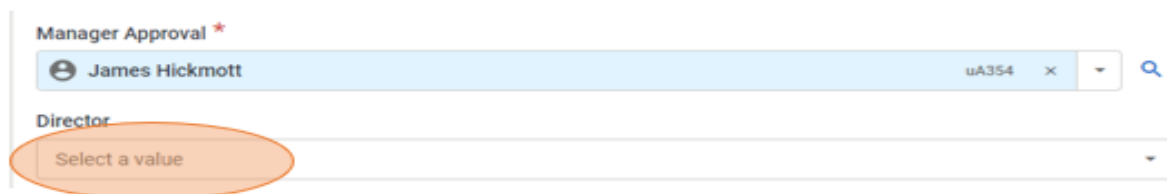
James Hickmott
ID: uA354

James Mitchell
ID: uA451975

James Pushparajan
ID: uA47

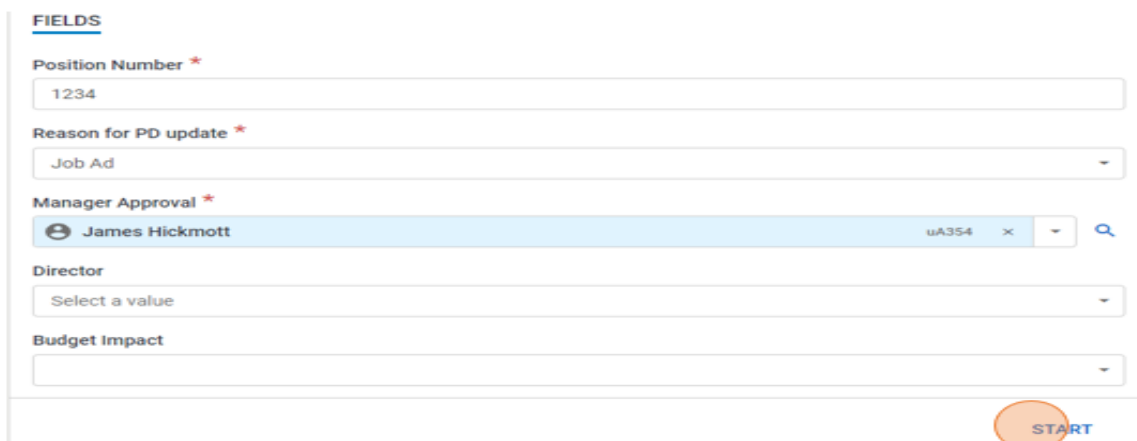
11. **OPTIONAL:** Select the Director for approval, **ONLY WHERE RELEVANT**. Remember various stakeholders are involved in the approval process of a Position Description (PD), and their involvement depends on the specific purpose for which the PD is required. Please ensure you review the [Source](#) for information on who needs to approve your position description **BEFORE** proceeding with this step.

If Director/CEO approval is required, the CEO's Executive Assistant and Director's Executive Support Officer will be automatically linked to this drop down and will receive an email notification.



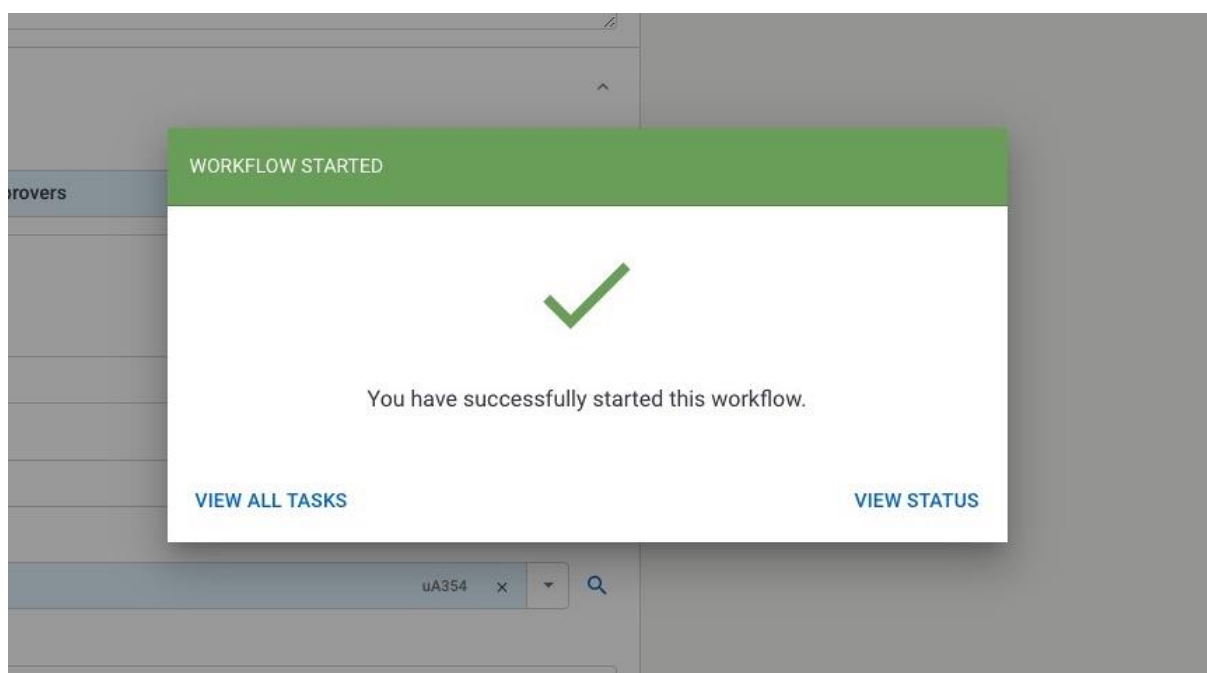
The screenshot shows two fields. The first field, labeled "Manager Approval" with a red asterisk, contains a selection for "James Hickmott" and a search icon. The second field, labeled "Director", contains the text "Select a value" and is highlighted with an orange oval.

12. Click START to start the workflow



The screenshot shows a form titled "FIELDS" with several input fields: "Position Number" (1234), "Reason for PD update" (Job Ad), "Manager Approval" (James Hickmott), "Director" (Select a value), and "Budget Impact". A blue "START" button is located at the bottom right of the form and is highlighted with an orange oval.

13. Congratulations, the PD approval process has now commenced!



What happens next?

14. The manager will receive an Approval email from Objective Administrator. You can approve or reject. Please use notes to advise of any changes.

15. OD will receive an Approval email from Objective Administrator. You can approve or reject. Please use notes to advise of any changes.

16. The initiator will receive an Approval email from Objective Administrator. You can approve or reject. Please use notes to advise of any changes.

17. The manager will receive a Final Approval email from Objective Administrator. You can approve, reject, or Finalise Edits.

Note - Finalise Edits should be clicked if the PD needs to be 'cleaned up'. This will send it back to the initiator to complete.

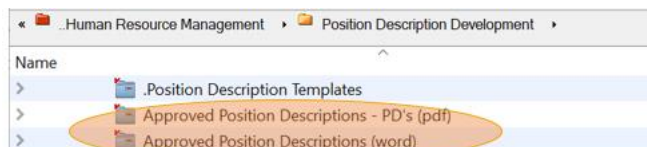
18. The manager will receive another email from Objective Administrator to either approve or reject the Finalise PD edits. (Process will move to step 20 if Director is not involved).

19. If Director has been nominated, they will receive a Final Approval email from Objective Administrator to either approve or reject.

20. If the workflow was for a **Job Ad** – OrgDevAdmin will receive an email to notify PD is approved for recruitment.

If the workflow was for **PDF** – the initiator will receive an email to notify PD is approved.

21. Workflow is finished. The PDs will automatically be moved to Approved Position Descriptions – (Pdf) & (Word) under their respective Directorate.



Another way to check on the status of the PD workflow in Objective is via tasks.



Click on Show tasks.



Click on the task to open status details.

File Edit Commands View Handy Windows Help

Task Criteria

Task Type:

all tasks

Task Status:

☒ Available

☐ Locked

☐ Overdue

☐ Suspended

☐ Completed within the last:

7

days

Show Tasks

Hide Criteria

Print

Name	Id	Last Updated	Object Requested	Required By	Required For	C
OD PD Approval	wA2388969	21/11/2023 09:17:52 PM	Position Description Approval Workflow slip 21/11/2023			
OD PD Approval	wA2480113	02/02/2024 09:12:40 AM	Position Description Approval Workflow slip 01/02/2024			
OD PD Approval	wA2549037	14/03/2024 02:56:12 PM	Arts Programs and Promotion Officer - February 2024- 28/02/2024			
OD Claim PD Approval	wA2554847	19/03/2024 04:27:34 PM	Library Partnership and Engagement Coordinator - PD - March 202...			

Note

- If you reject the workflow at any point the workflow starts again.
- You may be the initiator and the manager so expect more emails if this is the case.