

## Manage Positions

Jenny Kongkalai - 2023-06-04 - People

### [How to create and manage positions in Holocentric Connect](#)

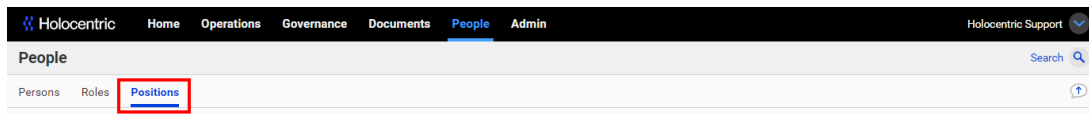
Positions are like Job Titles. They are more specific to an individual than a role. Positions can have responsibilities (Accountable, Approver, Owner, Reviewer) to items within Connect, which drives change management.

This article includes the following topics:

1. Create a new position
2. Edit position
3. Approve and publish a position

### 1. Create a Position

1.1 Go to the **People** tab and access the **Position** subtab.



1.2 Click **Add New Position**.

1.3 A release management workflow appears. Click **OK** to start adding a position.

## Editing a new Position



A draft will be created for editing. It will only be viewable by editors and admin.

When all editing is finished, it will no longer be editable and will be marked for approval. After approval it can be published. When published it will be viewable to users with 'View' permission.

OK

1.4 Enter information about the position and click **Save** when done.

**Add a new Position**

**GENERAL DETAILS**

Position name:  Cancel

Role:  Save

Position filled by:  Select

Summary:

Description:  🔗

**REPORTING STRUCTURE**

Business Unit:  Select

This Position reports to:  Select

Who reports to this Position:  Select

**VIEWING & SEARCH**

Keywords for 'Search':

Remove from view:  Hide this item from being viewed, listed, browsed, edited and searched for

**RESPONSIBILITIES**

Item responsibilities: 

Item type	Item name	Responsibility
<input type="text" value="link to any items of which this position is a stakeholder"/>		

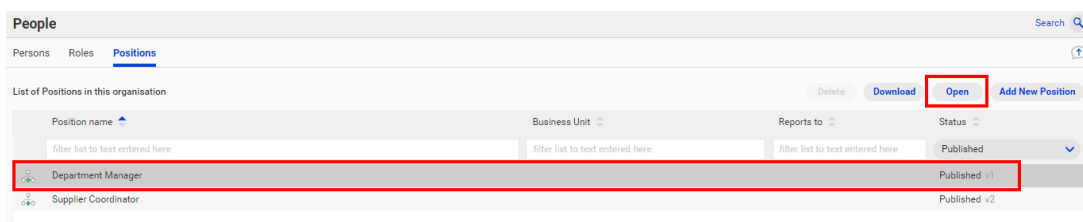
Add

Field	Description
Position Name	Name of the position
Role	Role that this position performs
Position filled by:	Select a user (of the WebApp) or person (not a Web App user) who performs the position

Summary	Short description of the position
Description	An explanation of this position
Business Unit	Business Unit the position belongs to
This Position Reports to	Who this position reports to
Who reports to this Position	Who reports to this position
Keywords for 'Search'	Keywords that, when searched in Holocentric Connect, will make the item appear in search results.
Remove from view	<p>Tick the box to hide the item. This will make the item only visible to users with Administrator permissions. Hidden items are:</p> <ul style="list-style-type: none"> <li>• not shown in lists</li> <li>• not shown as a related item on any other items.</li> <li>• not accessible by URL (will show item not found message)</li> <li>• not shown in any downloadable report.</li> </ul>
Item Responsibilities	<p>Link any items of which the position is an Accountable, Approver, Reviewer, and Owner stakeholder.</p> <ul style="list-style-type: none"> <li>• Documents</li> <li>• Policies</li> <li>• Processes</li> <li>• Regulations</li> <li>• Risks</li> <li>• Systems</li> <li>• Work Instructions</li> </ul>

## 2. Edit position

2.1 Click on the position you wish to edit and click **Open** .



2.2 Click **Start Editing**, a release management workflow will appear. If the position is already marked 'Awaiting Approval' or 'Ready to Publish', open the position and revert to a draft so you can edit it.

People > Positions

Department Manager Start Editing

Position Version

GENERAL DETAILS

Role: Business Unit Manager

Position filled by: Holocentric Support

Description:

2.3 Click **OK**. This will mark the position as 'Draft'.

## 2.4 Click **Edit**

Department Manager Draft v2 Finish All Editing

Position Version

GENERAL DETAILS

Role: Business Unit Manager

Position filled by: Holocentric Support

Description:

Edit

2.5 Make the necessary changes using the edit interface and click **Save** to commit the changes.

Department Manager Draft v2 Finish All Editing

Position Version

GENERAL DETAILS

Position name: Department Manager Cancel

Role: Business Unit Manager Save

Position filled by: Holocentric Support Add Select

Summary: enter a short description of the position

## 3. Approve and Publish position

3.1 Open the draft position. Click **Finish All Editing**.

Department Manager Draft v2 Finish All Editing

Position Version

GENERAL DETAILS

Role: Business Unit Manager

Position filled by: Holocentric Support

Description:

Edit

3.2 A release management workflow appears. Write a summary of what was added and click **Finish All Editing**. The new position is now ready to be approved.

**Finish all Editing for this Position**

Start Editing      Finish All Editing      Approve      Publish

This item will no longer be editable and will be set to 'Awaiting Approval'

Summary of what was changed:

Update reporting line

Cancel      Finish All Editing

3.3 If you agree with all the changes, approve the new position by clicking **Approval**. You will have the option to either approve the position or revert it to a draft (if you need to continue editing).

**Approve this Position**

Start Editing      Finish All Editing      Approve      Publish

Approve that "Department Manager" is ready to publish.

Approved by:

Holocentric Support

Approved on:

01 Jun 2023

Next review:

Select when this version should next be reviewed

Summary of what was changed:

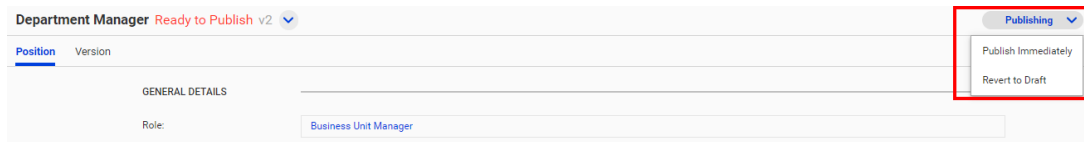
Update reporting line

Cancel      Approve

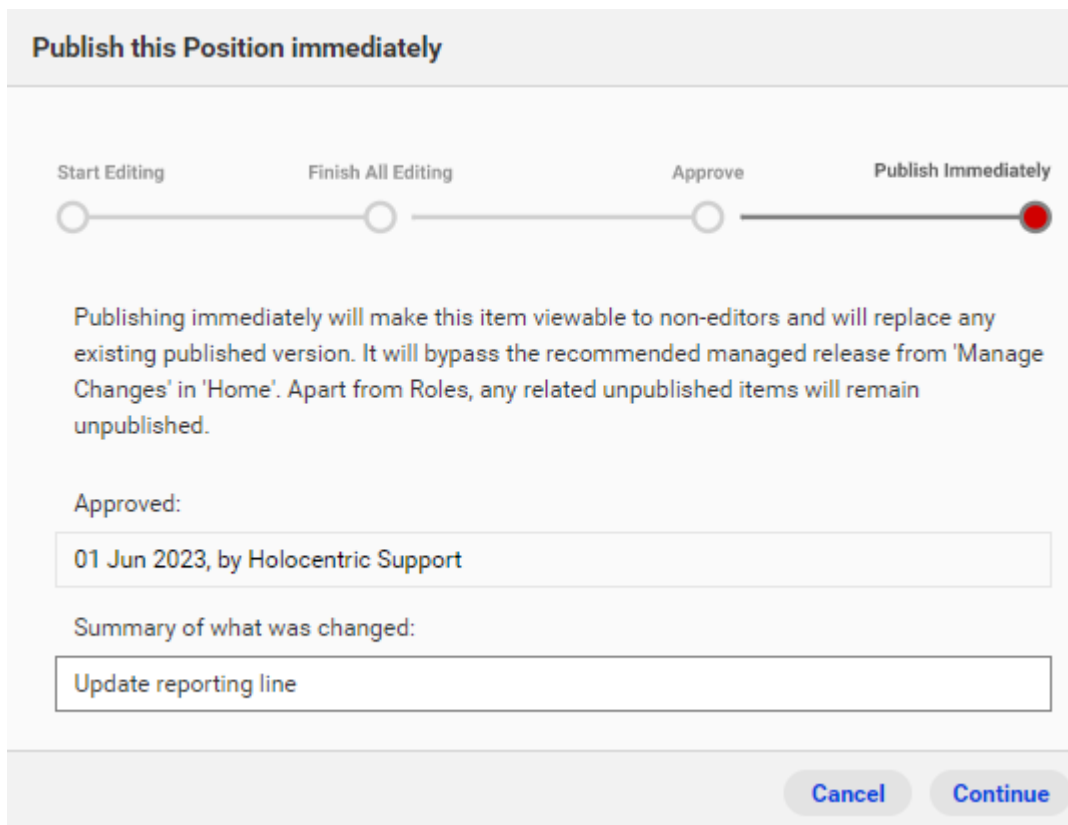
**TIP**

If the new position is part of a larger release (i.e. a release with multiple content updates), leave it marked 'Ready to Publish'. When you are ready, you can publish it at the same time as your other content updates by accessing the **Home** tab and clicking **Manage Changes**.

3.5 Click **Publishing** to officially publish latest version of that position. You also have the option to revert the position to a draft. Click **Publish immediately** to proceed with publication.



3.6 When you confirm publication, a release management workflow will appear. You have the option to edit the summary of what was changed. Click **Continue** to publish the new position.




3.7 The **Release label and notes** window appears. Write official release notes about the new position. You can edit the release notes later if required.

**Release label and notes**

Publishing: "Department Manager"

Label this release:

Release notes: 

Post a News Item about this when the items are published

News Item title:

News message:

Include a link to the Release summary

Email notification:  Email all users when this News Item is published

[Cancel](#) [Publish](#)

Field	Description
Label this release	The official name of this release.
Release notes	Details about what updates you have made.
Post a news item about this when the items are published	If selected, you can post a news item on the Home tab to notify users about your content changes.
News item title	Title of the news item that will appear in the Home tab.
News message	The message that will appear under the news item title.
Include link in release summary	If selected, this option will allow you to include a link to the release notes for the item.
Email all users when this News Item is published	If selected, all web app users in your organisation (provided they have activated their account) will receive an email notification about the release at 5:30 am AEDT/AEST the following day.

3.8 Click **Publish** to officially include the new position in the system. You will receive confirmation when the item is published.

**END**