U.S. Fish and Wildlife Service PD EXPRESS

PD EXPRESS TRAINING GUIDE

ADMINISTRATORS

Activity Reference Sheet

Introduction to PD Express for Administrators

U.S. Fish and Wildlife Service PD EXPRESS

This reference sheet is designed to accompany use in activities throughout the PD Express Course. Record data in the space provided as you progress through the activities.

Role	In-Class Actor (instructor)	Contact Information
Supervisor		
HR Evaluator		
HR Classifier		
Regional Admin		

Ref	Description	PD #
A	Published PD	**120932**
B	Published SPD	**120926**
C	PD created from existing	
D	Supervisory PD created from scratch	
E	PD created from existing	
F	SOD PD created from existing PD	
G	Career Ladder Full Performance PD - PD 3 of 3	
H	Career Ladder lower-grade - PD 1 of 3	
I	Career Ladder lowest-grade - PD 2 of 3	
J	User Account Activated	
K	New User PD Delegation	

Module 1: Scope and Rationale
1. All references in participant guide

Module 2: Getting Started with PD Express
1. Reference FWS User Account (Log in and Explore Navigation)
2. Reference QRG plus page n of HM participant guide
3. Reference A (3 methods of searching)
4. Reference A (downloading a PDF)
5. Reference A PDF documents in Appendix (Position Description, Job Analysis, Evaluation Statement, Coding Information)
6. Reference B and C – B- Search Criteria, C-Record PD# (Create a PD using an existing PD or SPD)
7. Reference C (Submit for Review)

Break:
Supervisor: Approve PDs in need of Supervisor Approval

Module 3: Create to Review
1. Reference D – Record PD# (Create New PD from scratch)
2. Reference D (Edit Occupation)
3. Reference D (add Duty 1, Duty 2, Duty 3)
4. Reference D (edit Duty 1, Duty 2, Duty 3, Delete Duty 1)
5. Reference D (add/edit qualifications)
6. Reference D (add characteristics)
7. Reference D (add/edit factors)
8. Reference D (Submit for Review)
(Visual Cues – Check for Understanding)

Break:
- HR: Reference D
  - Add a note to all participant PDs requesting a change in the Title
  - Add a Factor Recommendation
  - Add a Note regarding Factor Rec.
  - Move to *Revise* status
- HR: Reference C
  - Add a note stating "To be Reviewed" and leave in *Review*

Module 4: Revise to Publish
1. Reference D in Review Status(View a Note)
2. Reference E In Draft Status (Add a Note – Participants will not close this note or publish this PD)
3. Reference D in Revise Status with a title revision note added by actor HR Evaluator (Edit PD and Submit for *Final Review* status)

Break:
Supervisor: Approve PDs in need of Supervisor Approval
HR: move all participants Reference C PDs to *Publish* status

Module 5: SOD and CLPD
1. Record Reference F (Create SOD)
2. Reference F (View PDF SOD)
3. Record Reference G, H and I (CLPDs)

Module 6: Evaluation and Classification – HR ONLY
1. Reference C – Review a PD, add Coding Information and notes suggesting a change
   Reference D – Final Review
2. Reference C – Review Factors, provide recommended updates to 2 factors
   Reference E – Review PD, add coding information, assume factors correct
3. Reference D – Review Factors, Add Evaluation Statement & Justifications
4. Sign Reference C _Set PD to *Revise* status
5. Sign Reference E and *Publish* from *Review*
6. Test your Knowledge (offline)

Module 7: Administrator Functionality –Administrators ONLY
1. Reference J – User Name of Activate a User Account
2. Reference J – Modify User Account, add Organization Codes
3. Reference C – Delegate PD to different User
   Reference K – Record new PD Owner of delegated PD
4. Reference C – Mark PD as *Inactive*

TABLE OF CONTENTS

U.S. Fish and Wildlife Service PD EXPRESS

PD Express: Introduction for Hiring Managers, HR and Admins

Module 1 – *Scope and Rationale*

SCOPE AND RATIONALE

About this Module

What you will See:

The content in this module is an overview of the features of PD Express and business case that supports use of PD Express within FWS:

- Structure of Course
- Course Materials
- Key Features of PD Express
- Roles and Permissions within PD Express
- Key Terminology used within PD Express

What you will Do:

1. Understand the structure and intent of PD Express training
2. Organize your course materials
3. Define key terms such as PD, SPD, Career Ladder, and Statement of Difference in addition to defining PD Express Roles and Permissions

https://pdexpress.fws.doi.net/training

About this Course

This course is designed to introduce key features of PD Express. The content in this course will explain and provide opportunity to practice essential steps for creation of documents used at the start of the hiring process: the Position Description.

Course Materials

Your materials consist of a **Participant Guide**, **Activity Reference Sheet** and **Quick Reference Guide**. For your course, printed versions are available. *Take notes, highlight areas, dog-ear the corners... these are yours to keep!* Additionally, materials may be downloaded from the **Help** section of PD Express, where the latest version is posted.

HELP

The online participant guide PDF is searchable!

Participant Guide

Your participant guide consists of a complete set of modules tailored to meet your needs. The binder is designed to allow replacement of updated sheets as necessary.

Activity Reference Sheet

Each participant has an activity reference sheet to be used throughout the course. Hands-On activities will refer to this reference sheet so you will want to keep this close at hand throughout training.

HANDS ON…

Scenario-based problems

Test your knowledge by reading the scenarios and prompts in this sidebar, and then attempting to solve the problem without help!
The mouse icon in the corner indicates an online activity, while a pencil icon in the corner indicates a paper-pencil activity.

Hands-On Activities

Hands-On activities provide the opportunity for independent practice of the skills and techniques presented by the instructor.

Some participants may find the prompt provided in the Hands-On sidebar is just enough to get started. Others prefer to begin with the steps provided within the page, or refer to the steps only when "drawing a blank" or getting stuck. You can use whatever method is best for you to reach the goal of independent and confident use of PD Express.

On Track and Help Sidebars

On Track information highlights process, strategies and rules essential to success with PD Express. Often the **On Track** information provides answers to frequently asked questions regarding content presented on the page.

Help content provides tips on how to use the technology most efficiently and effectively.

Both **On Track** and **Help** are available in the sidebar of your participant guide.

ON TRACK…

If you encounter an unexpected issue, check the sidebar for explanations of common misconceptions or business logic.

These sidebars can help you get back and stay on track.

Instructor Presentation and Online Training Course

Your course instructor(s) will project slides to demonstrate use of PD Express. Key information is also available in the participant guide. We encourage you to take notes to clarify content, and if something is missing from participant material, please let us know. You are probably not alone with your question! Your feedback will help everyone succeed.

The training is designed to be instructor-led and follows a "watch-read-do" format. Your instructor will:

- Present a concept and/or demonstrate the skill (watch it)
- Point out key concepts in your participant guide (read it)
- Provide an opportunity for you to practice the skill (do it)

This course is also available online via DOI Learn. To access the online training course modules, go to https://gm2.geolearning.com/geonext/doi/login.geo and search the catalog for "PD Express."

Some participants choose to work ahead rather than stay with the instructor-led progression. Out of courtesy for your classmates, if you choose to work ahead, please refrain from asking questions on upcoming topics while the class continues to work on scheduled pace.

Timing of Instruction and Breaks

Check the agenda for timing of instruction modules, breaks, and lunch. Breaks are carefully planned in order to allow rest at key points in the instruction. Of course, take a break when you need one, but do your best to stick to the schedule.

Quick Reference Guide

Hang the Quick Reference Guide (QRG) near your computer. This guide provides both an overview of the features of PD Express, as well as a reminder of tips, tricks and PD Express Workflow schedule.

Activity 1 – Organize your Materials

Take a few moments to be sure you have all your materials.

HANDS ON…

Organize your Materials

Take a few moments to be sure you have all your materials.

- Participant Training Guide
- Activity Reference Sheet
- Quick Reference Guide (QRG)
- Pen/Pencil
- Computer with Internet Access

Key Features of PD Express

- Create and edit all PD Types -- PDs, Standard PDs (SPD), Statement of Difference PDs (SOD) and Career Ladder PDs (CLPD)
- Electronic signing and certification of PDs
- Automated Workflow and dashboard to track progress ("My Tracker")
- Ability to output print-ready documents
- Search the PD Express Library for all PD types
- "What's New" section highlighting the latest system enhancements

What About All the Paper PDs created and in use?

An intense data entry and migration effort was put forth during creation of PD Express to ensure several types of PDs were included. The strength of PD Express is ease of reuse and access to reference material. Note the PD of record prior to June 2010 is the paper copy on file with your Human Capital office.

Roles and Permissions

PD Express uses role-based security. Each user can be assigned a single role and each role has permissions to perform functions. Below is a chart showing common functions available to each role. As a note, typically Hiring Managers fulfill the PD Developer and Supervisor roles (PD Creators). HR and Administrator roles are covered in greater detail in additional training modules.

NOTE: To change roles, a Supervisor must log a change requests in writing, via the PD Express Issue Tracker (i.e. if a PD Developer now needs Supervisor access).

Role	Functionality Focus
PD Developer	Create, Edit and Search and View Published PDs
Supervisor	**PD Developer** Plus: View and Certify PDs of subordinates
HR Evaluator	**PD Developer** plus: Create an SPD, Review PD/SPD and submit recommendations
HR Classifier-14 HR Classifier-15	**HR Evaluator** plus: Certify and Publish PDs and SPDs
Regional Administrator	**Supervisor** plus: User Account Management, Process Accountability
Global Administrator	Technical Integration and Deployment

Key Terminology

The purpose of this training is to support the implementation of PD Express within FWS. This training is not meant to be a comprehensive orientation to hiring terminiology or legislation. Since PD Express is patterned after current HR practices, instructors and material will use acronyms and terms common to the current HR environment at FWS.

Key acronyms you may hear throughout training are outlined below with definitions to aid understanding.

- **CLPD** (Career Ladder Position Description): a PD type created as part of a planned progression from one position to another of a higher grade that do not need to be completed as a person is promoted through the ladder
- **FES** (Factor Evaluation System): nine factor evaluation standard used most often to assign grade level to **nonsupervisory** positions under the General Schedule
- **FPPS** (Federal Personnel Payroll System): system where manually assigned PD numbers (assigned by HR) are stored and associated to a person. This number is optional going forward, as PD Express provides a reference number, but will be on PDs converted prior to June 2010.
- **GSSG** (General Schedule Supervisory Guide): six factor evaluation standard used most often for determining the General Schedule grade level of **supervisory** positions.
- **IA Action** (Identical Additional): a position characteristic indicating if the PD can be associated to multiple people. Check "yes" on this to indicate Identical Additional positions are permitted.
- **OPM** (Office of Personnel Management): the office responsible for setting standards for the hiring process and Federal HR Legislation Compliance.
- **PD** (Position Description): documents developed by subject-matter experts and classified by HR to outline an existing position in the Service
- **SOD** (Statement of Difference): a PD type created as a grade lower than the Full Performance position. Lower grade can be one or two-grade interval.
- **SPD** (Standard Position Description): classified and approved PDs describing work for a number of positions whose duties are basically the same and thus, suitable for establishment at various locations across the Service

U.S. Fish and Wildlife Service PD EXPRESS

PD Express: Introduction for Hiring Managers, HR and Admins

Module 2 – *Getting Started*

GETTING STARTED

About this Module

What you will See:

The content in this module explains the following PD Express features and functionality:

- Login
- Interface navigation
- "My Tracker" dashboard
- Visual Cues
- Automated Workflow: Schedule and Status
- Contextual Help
- Basic and Advanced Searching
- Downloading and viewing PDF documents
- Create a PD from an existing PD
- Change a PD from *Draft* to *Review* status

What you will Do:

1. Practice logging in with your username and password
2. Explore menu options to locate Help, FAQ and References available
3. Practice 3 methods of searching
4. Demonstrate the process of downloading PDF documents
5. Compare printed versions of the Position Description, Job Analysis, Evaluation Statement and Coding Information (OF-8) PDF documents to online PD Express screens
6. Create a PD from an existing PD

https://pdexpress.fws.doi.net/training

HELP

PD Express vs. Training

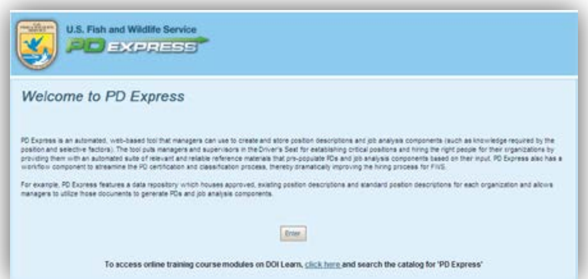
We will be practicing how to use the tool in the training environment. Once you are comfortable using the tool, feel free to access the live, production website at:

https://pdexpress.fws.doi.net

This is the real PD Express!

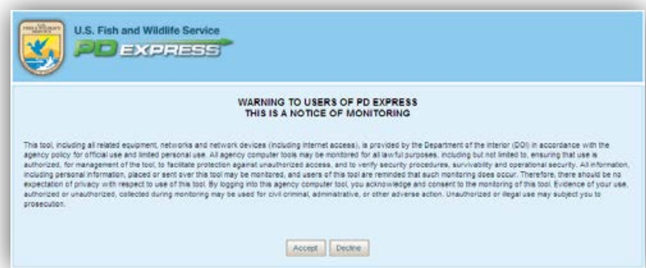
Logging In to PD Express (Training site)

Log in to the training site by accessing **https://pdexpress.fws.doi.net/training**. Click the **Enter** button presented when you first come to the Welcome Screen and you'll be brought to the Notice of Monitoring page.



Notice of Monitoring

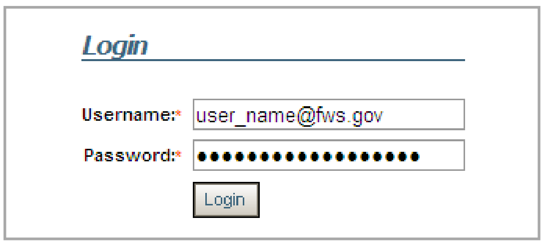
Each time you open your web browser to log into PD Express you will be prompted with a "Notice of Monitoring." **Be sure to read the notice**. Failure to understand and adhere to the terms of use of PD Express can result in disciplinary action, including job termination.



Clicking the **Accept** button is an indication of your understanding and agreement to comply with this notice.

Username and Password

PD Express is tied to the FWS Active Directory account used on workstations and other network applications. Logging into PD Express is as easy as entering the username and password you already know and clicking **Login**.



If your network password changes, it will also change in PD Express.

Login Error Messages

A failed login attempt results in one of the following messages at the top:

"Your login attempt was not successful. Please try again"

This message typically means an incorrect password has been entered. Try retyping your login information again.

"There is no user in the database with the username [xxxxx]"

The most common causes for this error are: (1) Incorrect entry of user name. Login is case sensitive, which means that upper and lower case matters, or (2) new employees whose account does not yet exist in PD Express

"You are not authorized to access PD Express"

This error is most likely due to your account settings within PD Express. In other words, your account exists, but without rights.

"Your account has been locked out …You WILL NOT be able to login until you contact FWS IRTM Help Desk and have your account unlocked.

This error occurs when too many log in attempts are made with an incorrect password. Contact IRTM to reset your Active Directory password.

HELP

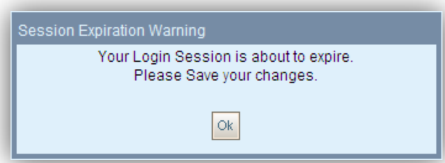
Login and Access

For login and access errors, the proper action is to contact your **Regional Administrator** for assistance.

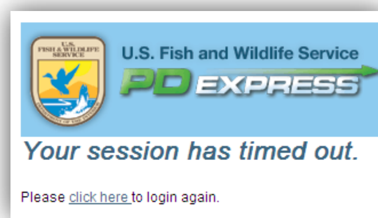
Click **Support Desk** on the bottom of PD Express to log a request/issue.

You can help your **Regional Administrator** track the problem more quickly if you **provide the error message in your request**.

Session Timeout



For security reasons, PD Express is set to automatically log out inactive users. If you are logged in to PD Express for longer than 30 minutes without actively using the tool, your session will expire.



A warning message will appear 2 minutes before timeout. Click **OK** to continue your session for another 30 minutes. If you do not click OK, you will be shown the timeout screen and need to login again.

Should your session time out, any unsaved changes will be lost.

Challenge Question

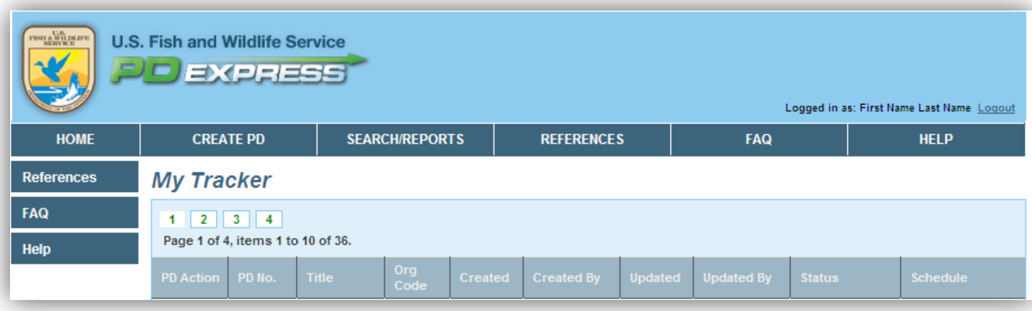
Marla begins to create a PD at 3:00. She enters some fields on the first screen, but *before she saves her work* she is interrupted by a phone call. The call finally ends at 3:45. When Marla returns, her PD Express screen reads "Your session has timed out." She selects to login again and enters her username and password again, but cannot locate the work she started earlier. What happened?

Challenge Answer

Marla didn't save her work. When a PD Express session expires due to inactivity, unsaved work is lost.

Successful Login – Interface Tour

Access to menu items is granted based on your account role and permissions. The menu items shown below will be displayed to all users. Above the horizontal menu you will see your first and last name along with a **Logout** link.



Let's take a few moments to explore the menu options, from left to right:

- **Home**: For logged-in users, returns to the "My Tracker" dashboard to view status of in-progress PDs
- **Create PD**: Presents options for development of PDs, SPDs, SODs, and Career Ladders based on user role and permission
- **Search/Reports**: Presents options for Basic and Advanced searching and reporting of standard and non-standard PDs
- **References**: Contains additional material to assist in the use of PD Express, such as links to OPM material and process guides
- **FAQ:** Have a question? Chances are you are not alone. Look to the "Frequently Asked Questions" section for answers.
- **Help**: Includes PDF versions of training files and quick reference guide

HANDS ON…

Goal:

Login to PD Express

Explore Navigation:

- FAQ
- Help
- References
- Home

Activity 1 – Login to PD Express and Explore Navigation

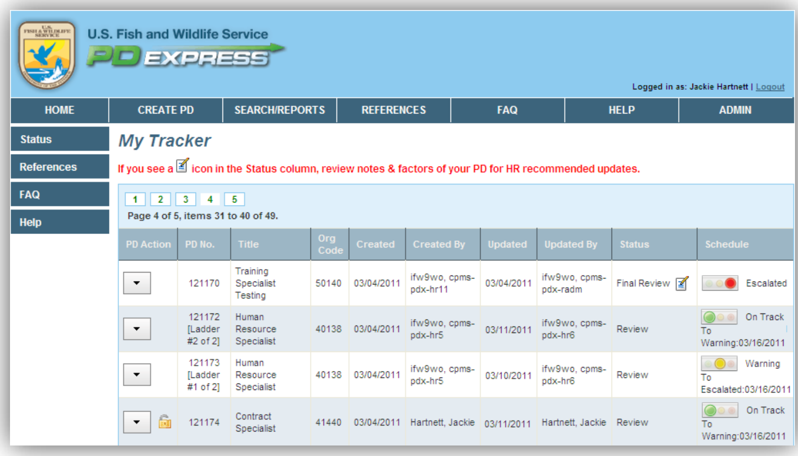
Upon completion of this activity you will have successfully demonstrated use of your username and password to access PD Express. Once logged in, take this opportunity to become familiar with navigation using the menu. Click **Help**, **FAQ**, **References**, **Home**, and **Status** to change screens.

1. Go to https://pdexpress.fws.doi.net/training
2. Click **Enter** and then **Accept**
3. Using your network account information, type your username into the **Username** field
4. Type your password into the **Password** field
5. Click **Login**
6. Explore **References**, **FAQ** and **Help** links by clicking the links

My Tracker Dashboard

The "My Tracker" dashboard lists PDs currently in progress and viewable based on account role and access rights. During training, it is likely the dashboard will be empty upon first log in.

Once you get started, in-progress PDs will display in your tracker for viewing and/or editing.



Let's take a few moments to explore the "My Tracker" dashboard fields:

- **PD Action**: choose an action to perform on a PD, move your mouse over the "triangle" in the PD Action column. The drop-down menu options depend on the PD status as well as your account settings (options include: View, Edit, Continue Edit, and Finish Edit).
- **PD No.:** auto-generated number unique to each PD. Use this number when referring to your PD or searching within the tool.
- **Title:** the FWS Position Title entered during the Create PD process
- **Org Code:** the Organization Code in which the PD is being created
- **Created / Created By:** the name of the PD creator (usually the original author, unless delegated) as well as date the PD first entered *Draft* status
- **Updated / Updated By:** each time the PD is updated, these columns will update with the name of the editor as well as the date the edit was performed
- **Status:** current workflow status of the "in progress" PD
- **Schedule**: current schedule timing relative to workflow; can be either On Track, Warning or Escalated; also displays date PD will reach next schedule
- **Page Count and Navigation**: the tracker displays in-progress PDs in groups of 10. To page through groups of PDs, click the page number.

HELP

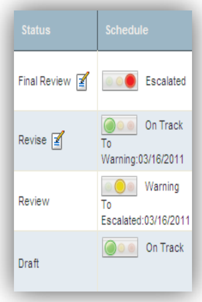
Sort "My Tracker"

To sort each column, click on the column heading.

Sort the **Schedule** column to group and display PDs by Schedule. This will allow you to quickly find PDs in need of more immediate attention.

Sort the **Status** column to view PDs at the same stage in the workflow. It may be more efficient to complete revisions before moving on to create a new PD.

A sorted column will display a small arrow icon to indicate an ascending or descending sort.



Workflow: Status and Schedule

Status and Schedule indicate stage in the workflow.

Status

The status of a PD determines who can work on it as well as the type of possible action. A PD can be in one of 6 statuses (Draft, Review, Revise, Final Review, Published and Inactive).

In-Progress Statuses

PDs progress through 4 statuses during the creation process. These are considered “in-progress” statuses and will appear on the “My Tracker” dashboard. PDs that are published or inactive will not appear on the dashboard, but are searchable to users. Let’s review:

Status	Who can Edit?	In Progress?	Active?
Draft PD is initiated	**PD Creator** **PD Creator Supervisor**	**Yes**	**Yes**
Review HR Reviews for compliance	**HR users**	**Yes**	**Yes**
Revise PD Creator revises	**PD Creator** **PD Creator Supervisor**	**Yes**	**Yes**
Final Review HR Reviews for compliance	**HR users**	**Yes**	**Yes**
Published Certified and complete	**No longer editable** **All users can search**	**No**	**Yes**
Inactive No longer available for use	**No longer available for use** **Users with Org code can search**	**No**	**No**

A user with the role of Administrator can set a PD to *Inactive*.

- A PD may need to be set to *Inactive* when it is deemed no longer valid /useful. This occurs when positions become obsolete or dramatically changed.
- A PD can be set to *Inactive* from any status
- Log inactivation requests in the Issue Tracker tool by clicking **Support Desk** within PD Express (see **Issue Tracker / Support Desk** module for more information)

Schedule

Icons and text found in the **Schedule** column indicate whether the PD is being addressed on-schedule. Let's review these workflow schedule cues:

On Track
On Track

An *On Track* PD moves through the workflow stages within scheduled timing.

- *A PD in Draft* status will always be On Track as there is no time limit on this particular status

Warning (About to Escalate)
Warning

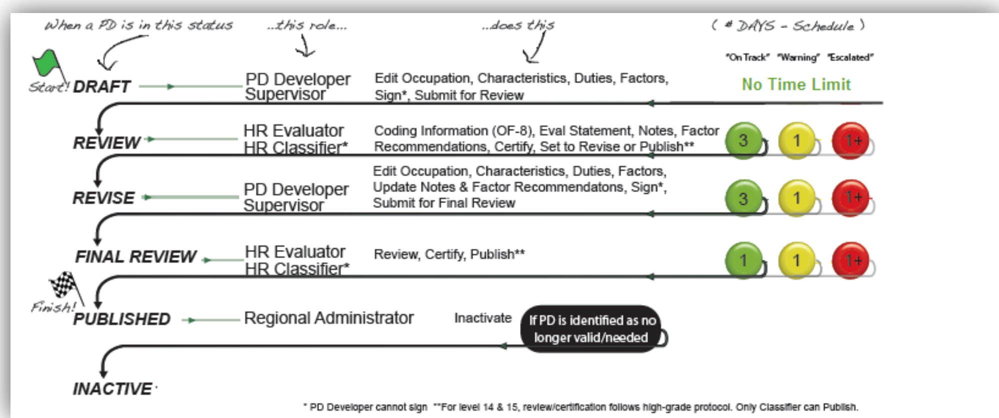
This is a warning to the editors and reviewers that the PD is nearing the state of escalation. If not handled within the scheduled time, the PD will escalate.

Escalated
Escalated

An *Escalated* PD has exceeded time allowed by the schedule and **requires immediate attention.**

- *A PD in Review* or *Revise* status is set to "escalated" on the 5th business day
- *A PD in Final Review* status is set to "escalated" on the 3rd business day

The following diagram shows the lifecycle of PD via the workflow:



Weekly Escalation Emails to Service Management

PD Express automatically sends **weekly emails to FWS Management** (Assistant Director, HR Director/Human Capital Officer - HCO) notifying them of E*scalated* PDs in HR status (*Review* and *Final Review*). Be prudent in keeping your PDs on track so they are not flagged in the weekly Escalation email.

ON TRACK…

Monitor "My Tracker"

PD Express sends weekly escalation messages to high level management. Users are able to view escalated PDs on the "My Tracker" dashboard.

Stay on track by checking your PD Express "My Tracker" dashboard daily and taking action on PDs before they reach *Escalated* status!

ON TRACK…

Courteous Collaboration

Collaboration is a wonderful option in PD Express. To keep collaboration on the right track, use best practice strategies:

- Keep current with your editing. When you finish editing, be sure to choose **Finish Edit** or submit to the next workflow status (which automatically unlocks the PD).
- If you need to work on a PD and your colleague has it locked, **talk with them before breaking the lock**. Editing may actively be in progress!

PD Tracker Visual Cues

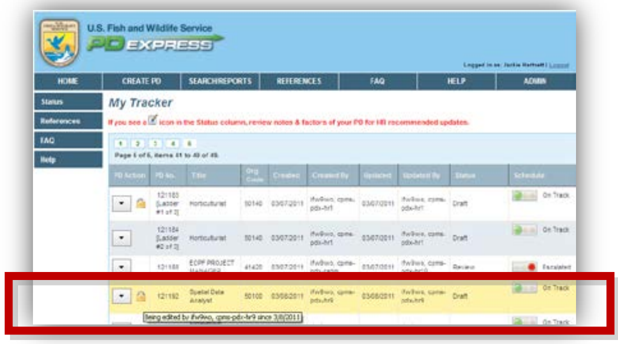
Locking and Unlocking a PD

A PD is created in collaboration between PD Creator, HR and sometimes a delegate for the PD Creator. For this reason, more than one user may have rights to **edit** the same PD.

In this scenario, two users working on the PD at the same time might overwrite the other’s changes. To avert this scenario, PD Express provides visual and textual signals when a user has started the editing process. This “lock/unlock PD” functionality is illustrated below:

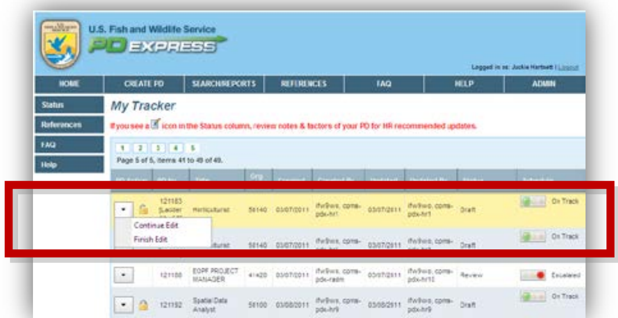
PD Locked and Unavailable: Example 1

The **closed lock icon** indicates another user is editing the PD. When moving your mouse over the **lock icon**, text will display indicating the name of the user who has the PD locked. That user must **Finish Edit** or **Save and Unlock** to exit out of the PD.



PD Locked and Editing: Example 2

An **open lock icon** indicates the logged-in user is editing the PD. In this example, PD #121183 is “unlocked” for editing. This user may **Continue Edit** to open the PD and modify content, or may **Finish Edit** and unlock it so others may access it.

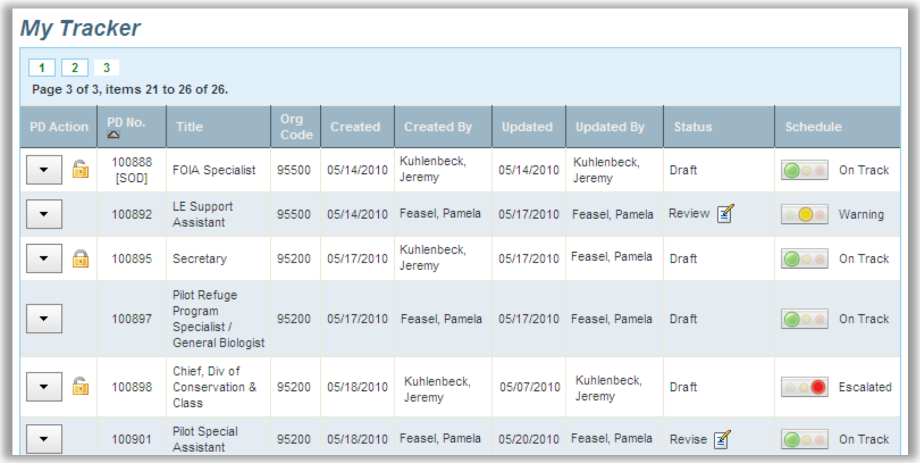


No Lock Icon: Example 3

If **no lock icon** displays, no user is editing the PD. The options presented in the **PD Action** menu will depend on user rights and status of the PD. If the PD is in *Draft* or *Revise status* and the user is a PD Developer or Supervisor, they will see **View** and **Edit**. If the PD is in *Review* or *Final Review*, the PD Developer or Supervisor will see **View** only.

Activity 2 – Interpret My Tracker Visual Cues

The following activity will help you check your understanding of visual cues displayed in the "My Tracker" dashboard as well as give you practical examples of status / scheduling scenarios. The screenshot below is the dashboard of PD Express user Jeremy Kuhlenbeck, who has Supervisor privileges, thereby allowing him to create and sign draft PDs. Use this example to answer questions 1-5. Use the other screenshot to answer questions 6-15.Write your answers in the space provided. (**NOTE**: Next schedule dates removed for activity.)



My Tracker

1 2 3

Page 3 of 3, items 21 to 26 of 26.

PD Action	PD No.	Title	Org Code	Created	Created By	Updated	Updated By	Status	Schedule
	100888 [SOD]	FOIA Specialist	95500	05/14/2010	Kuhlenbeck, Jeremy	05/14/2010	Kuhlenbeck, Jeremy	Draft	On Track
	100892	LE Support Assistant	95500	05/14/2010	Feasel, Pamela	05/17/2010	Feasel, Pamela	Review	Warning
	100895	Secretary	95200	05/17/2010	Kuhlenbeck, Jeremy	05/17/2010	Feasel, Pamela	Draft	On Track
	100897	Pilot Refuge Program Specialist / General Biologist	95200	05/17/2010	Feasel, Pamela	05/17/2010	Feasel, Pamela	Draft	On Track
	100898	Chief, Div of Conservation & Class	95200	05/18/2010	Kuhlenbeck, Jeremy	05/07/2010	Kuhlenbeck, Jeremy	Draft	Escalated
	100901	Pilot Special Assistant	95200	05/18/2010	Feasel, Pamela	05/20/2010	Feasel, Pamela	Revise	On Track

1. **Which PDs does this logged in user have open for editing?**

2. **Should a non-HR user have an edit option for PD #100892?**

3. **Which PDs does this user not have the ability to edit right now as they are locked for edit by another user?**

4. **If Jeremy has rights to edit PD #100901 which two options should he expect to find in the PD Action column?**

    a. **View**

    b. **Edit**

    c. **Continue Edit**

    d. **Finish Edit**

5. **What edit rights would we expect Jeremy's Supervisors to have to his PDs?**

HANDS ON…

Goal:

Interpret Tracker Cues

Understand the Workflow and "My Tracker"

Use the **Quick Reference Guide** and this screen shot of "My Tracker" to help you answer the questions.

Refer to the calendar for reference when answering questions related to Schedule.

Write your answers in the space provided to the left of each question.

HANDS ON…

My Tracker Cues / Workflow and "My Tracker

Activity 2 cont. – Using your QRG to read "My Tracker"

My Tracker

1 2 3 4

Page 4 of 4, items 31 to 37 of 37.

PD Action	PD No.	Title	Org Code	Created	Created By	Updated	Updated By	Status	Schedule
	100183 [SOD]	Regional Conservation Goals Coordinator	98200	02/25/2010	Feasel, Pamela	03/04/2010	Marsh, Joan	Review	On Track
View Edit		Safety Manager	93120	02/26/2010	Hartnett, Jackie	03/08/2010	Feasel, Pamela	Final Review	On Track
	100188	Supervisory Wildlife Biologist	91200	02/26/2010	Hartnett, Jackie	03/05/2010	Hartnett, Jackie	Revise	On Track
	100191 [SOD]	Regional Conservation Goals Coordinator	93210	02/26/2010	Hartnett, Jackie	03/01/2010	Feasel, Pamela	Review	Escalated
	100202	Secretary (OA)	97300	03/01/2010	Bailey, Joseph	03/08/2010	Feasel, Pamela	Final Review	Warning
	100204	Secretary (OA)	97300	03/01/2010	Bailey, Joseph	03/02/2010	Bailey, Joseph	Review	Warning
	100206	Safety and Occupational Health Manager	90100	03/08/2010	Kuhlenbeck, Jeremy	03/08/2010	Kuhlenbeck, Jeremy	Draft	On Track

1 2 3 4

Page 4 of 4, items 31 to 37 of 37.

March 2010

S	M	T	W	T	F	S
28	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20

6. Who Created PD #100202? ____________________
7. Which PD is being selected for edit? ____________________
8. How many total PDs does user have available on "My Tracker" dashboard? ____________________
9. Which PD is in Final Review status heading toward escalation? ____________________
10. What is the status of the PD #100188? ____________________
11. If today is March 8th, on what date will PD #100202 move to escalated status? ____________________
12. What will happen to PD #100183 if it is not moved to Review status today? ____________________
13. Who is responsible for assuring that PD #100183 moves to Review status? ____________________
14. If PD#100188 went to Revise status on March 8th, on what day will it become Escalated if not moved to the next status? ____________________
15. Which role is responsible for moving a PD from Final Review status to Published? ____________________

Searching and Reporting on PDs

You will come to depend on the **Search/Reports** functionality as you begin to create material in PD Express. Searching helps locate PDs to use as a reference during the creation process and PD Express allows you to search with broad or specific information.

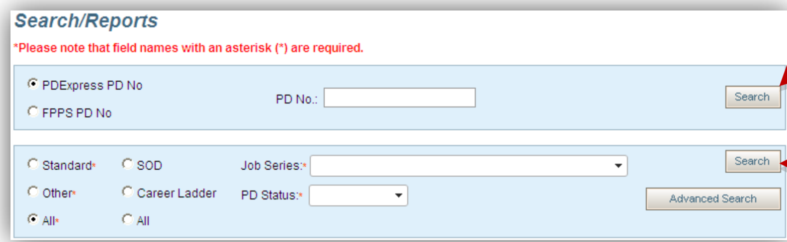
One of the best ways to understand the end-goal of PD creation is to view a *Published* PD. First, we need to find one!

Basic Searches

Search by Number

- Simply type the PD or FPPS PD number in and click **Search**. Each PD is assigned a unique number, so you will have one result in your report.

When searching by **PD No.**, be sure to use the **Search** button in the same row as the **PD No**. field.



When performing a basic search by **Job Series** click the **Search** button in the same row as the **Job Series** field.

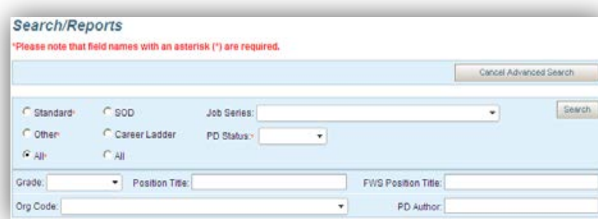
Search by PD Type, Job Series and PD Status

- Select **Standard**, **Other** or **All**, to produce results. **Standard** gives you just SPDs while **Other** provides special types of PDs such as SOD PDs or Career Ladder PDs. Required fields are indicated by a red asterisk (*).
- Further select the **Job Series** and **PD Status** drop-down to search for PDs or search by **SOD** or **Career Ladder** type

Advanced Search

A more specific search can be run by clicking **Advanced Search**

- Select options via drop-down search functionality within the **Grade** or **Org Code** fields**.**
- Enter text into the **Position Title** or **FWS Position Title** fields to search for full or partial titles
- Enter the last name of a PD Express user into **PD Author** field to search for PDs created by that user
- Notice Job Series is not required in this search type. This is so users can search all PDs within an Org Code, with a particular Title or Grade, etc.



HANDS ON…

Goal:

Perform Basic and Advanced Search

Search 1: PD Number

Use Reference A from your Activity Reference Sheet to complete this activity.

Search 2: Job Series and PD Type

Search 3: Advanced Search with "Bio" in the Title

Challenge Question

Can you search for all PDs within your specific Organization?

Activity 3 – Searching PD Express

Upon completion of this 3-part activity you will have demonstrated 3 methods for searching PD Express.

Part 1 - Basic Search by PD Number

1. Ensure you are logged in to PD Express
2. Click **Search/Reports** from the top menu buttons
3. Type the **PD number** (120932; Reference A) into the **PD No**. field
4. Click **Search** to the right of the **PD No**. field
5. **View** the **Position Description** document using the drop-down menu in the **Documents** column on far right

Part 2 - Basic Search for a Standard PD (SPD) by Job Series

6. Click **Search/Reports** from the top menu buttons
7. Select **Standard** on left side of Search box
8. In the **Job Series** dropdown, select **Job Series** "486:Wildlife Biology Series"
9. Select a **PD Status** of *Published*
10. Click the **Search** button to the right of **Job Series**
11. **View** the **Position Description** document using the drop-down menu in the **Documents** column on far right

Part 3 - Advanced Search by Title

12. Click **Search/Reports** from the top menu buttons
13. Click **Advanced Search**
14. Select **Job Series** "482:Fish Biology Series"
15. Select a **PD Status** of *Published*
16. Type the phrase "bio" in the **Position Title** field
17. Click **Search**
18. Your report will display all *Published* PDs within the "482:Fish Biology Series" with the text "bio" in the **Position Title** (notice how FWS Position Title may differ)
19. **View** the **Position Description** document using the drop-down menu in the **Documents** column on far right

Answer to Challenge Question:

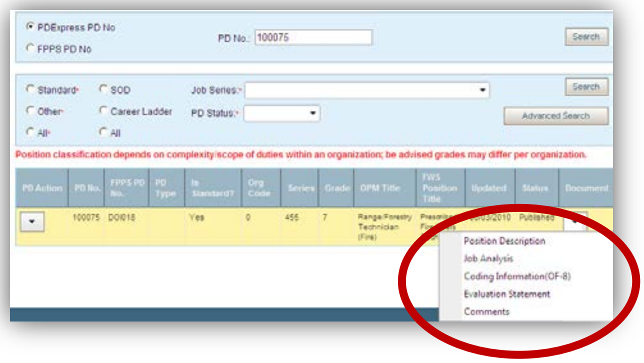
Yes. You can conduct an **Advanced Search** and select your Org Code. Be sure to select a PD Status of *Published* and either Standard, Other or All from the left side.

Search Results Report

Your search results will depend on your account access permissions. All *Published* PD from the PD Express Library are searchable by all users, but in-progress PDs can only be accessed by those who have access based on role permissions.

Documents

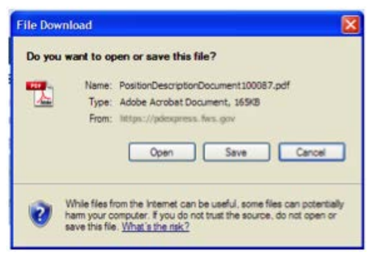
Generate a PDF version of the PD and other documents related to the PD by moving your mouse over the “triangle” button in the **Document** column on the far right.



Every PD will have at least 4 documents, potentially 5: the *Position Description*, *Job Analysis*, *Coding Information (OF-8)*, *Comments* and *Evaluation Statement (optional).* These can be downloaded in separate PDF files. *Position Description* combines most information from each of the 5 online screens and will meet the needs of most users.

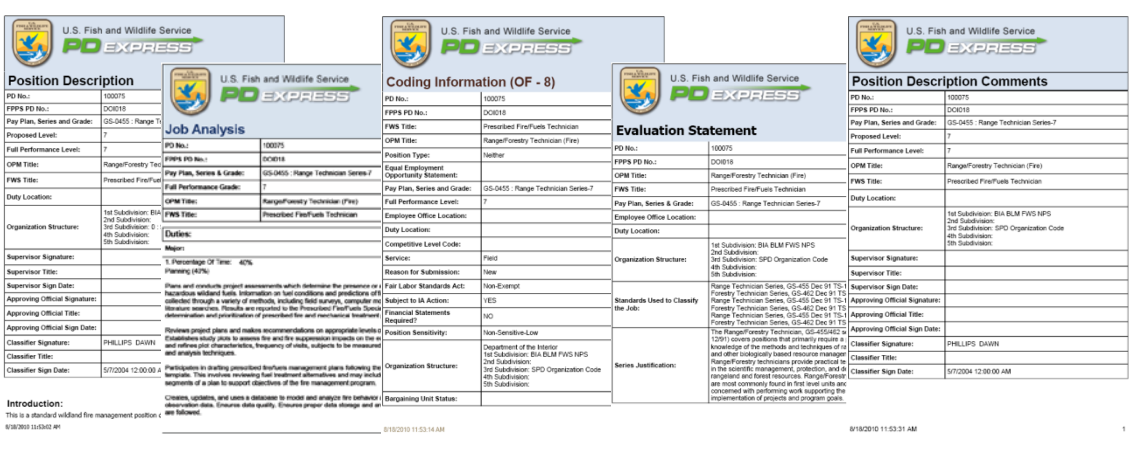
Document files are able to be viewed and downloaded at any point in the PD creation process from the **Search/Reports** screen.

Downloading PDF Documents



When you view a printable version, you are actually downloading a file type PDF (Portable Document Format).

Upon choosing a PDF document, your computer will give you the option to **Open** the PDF or **Save** it. Either way, a standard PDF viewer, such as Adobe Acrobat, will allow you to print the document with a date stamp at the bottom of the page.



PD Actions

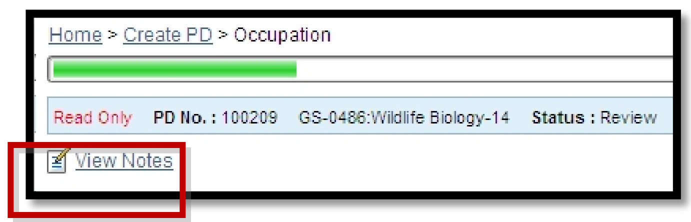
View and **Edit,** are just two options available directly from the **Search** screen when PD status and account permissions allow (for permissions, refer to the **Scope and Rationale** module).

Use the **PD Actions** column on the left to **View, Edit, Continue Edit, Finish Edit, Copy & Start New** or **Create SODs** from a PD in your search report.

Viewing a PD Online

Sometimes downloading the PDF is not necessary. One of the benefits of PD Express is the ease of content reuse. Viewing a PD online is a fast way to reuse data.

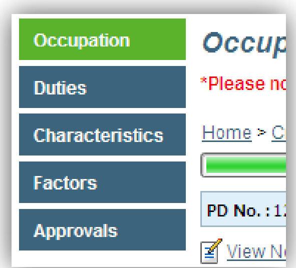
Either from your "My Tracker" dashboard, or from the **Search/Reports** screen, you will find the option to **View** a PD (in read-only mode) from **PD Actions** column.



Changes cannot be made in Read-Only mode, so it is likely fields will appear in gray color font.

5 Screens of PD Creation

At a basic level, PD creation involves completion of required fields on five screens:



- **Occupation** – select info such as **Pay Plan, Grade, Job Series, Title** and **Organization Code**
- **Duties** – outline job responsibilities and **Qualifications**
- **Characteristics** – define **Employee Office** and **Duty Location** as well **Subdivisions**
- **Factors** – Selection/definition of evaluation format and factors determining grade level
- **Approvals** – Sign, Certify and Publish by authorized users

Once a PD is created in PD Express, the menu allows you to click through the Duties, Characteristics, Factors, and depending on permissions, Approvals screens.

Activity 4 - Compare Online Screens to PDF Documents

In this activity you will use the **Document** menu on the **Search/Report** screen to download the PDF version of the Position Description. You will then examine the pre-populated data and compare it to the printed version of the PD, one screen at a time. Record your answers in the space provided.

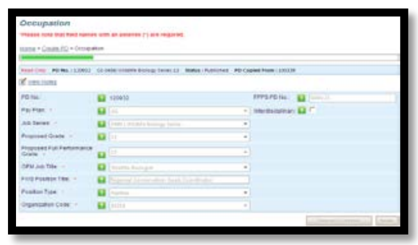
Part 1 – View/ Print PDF Documents

1. Search for **Reference A** (120932) from your Activity Reference Sheet
2. In Document column, select **Position Description** and click **Open** and print out this document
3. Close the PDF file and return to PD Express
4. Repeat steps 1-3 for remaining documents (Job Analysis, Coding Information, Comments and Evaluation Statement)
5. Back on **Search/Reports** screen, select **View** from the PD Action column

Part 2 – Compare Screen to Print

Occupation

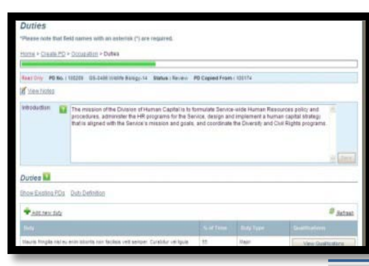
Look at the **Occupation screen** and locate the data on the printed PDF documents: *Position Description*, *Evaluation Statement* and *Coding Information (OF-8).*



1. **Locate the Organization Code on the Occupation Screen. Where does the Organization Code appear on the PDF documents?** ____________________

Duties & Qualifications

Use the left side menu to navigate to the **Duties screen**. Here, the position is articulated in terms of duties, qualifications and time. Look at the online content. Compare it to the PDF.



2. **Which 2 PDF documents contain Duties?** ____________________

3. **Which is the only document containing the introduction statement?** ____________________

HANDS ON…

Goal:

Identify connection between online fields and Printed PDF docs

In this activity we will practice downloading PDF documents as well as viewing the PD in Read Only mode.

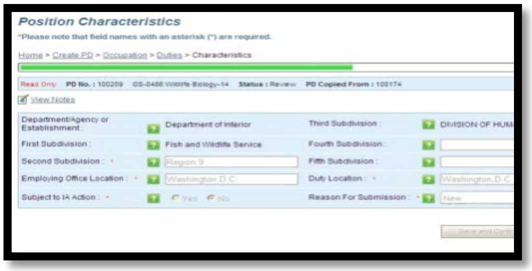
Together we will be comparing what we see on the screen with what we see in the printed documents.

Use **Reference A** from your Activity Reference Sheet, along with documents supplied to complete this activity.

HANDS ON…

PDF/Screen Compare cont.

Position Characteristics



Review the Characteristics screen (both PD Creators and HR are responsible for information on screen)

Most of this information appears on the Coding Information (OF-8) form.

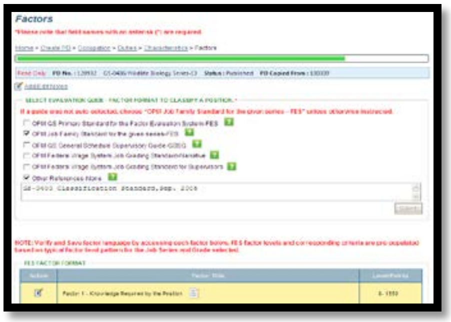
4. **On which document does the FLSA information appear?**

5. **On which document do you find the most information from the Characteristics screen?**

6. **Which field would you modify to indicate that the employee occupying this position will work in Lexington, Kentucky?**

7. **Does Duty Location appear on the Position Description document?**

Factors



Navigate to the Factors screen.

Factors are used to classify a position. The evaluation guide and factor format are selected and managed from the factor's screen. The total points should fall within the grade conversion range selected on the occupation screen.

This screen is also where HR resources can add an Evaluation Statement to the PD, though this information is optional to PDs.

8. **Which 2 documents contain the Factors and corresponding levels/points?**

9. **Which 2 documents show the total number of points as well as the Grade Conversion Range for the position?**

Approvals

HANDS ON…

PDF/Screen Compare cont.

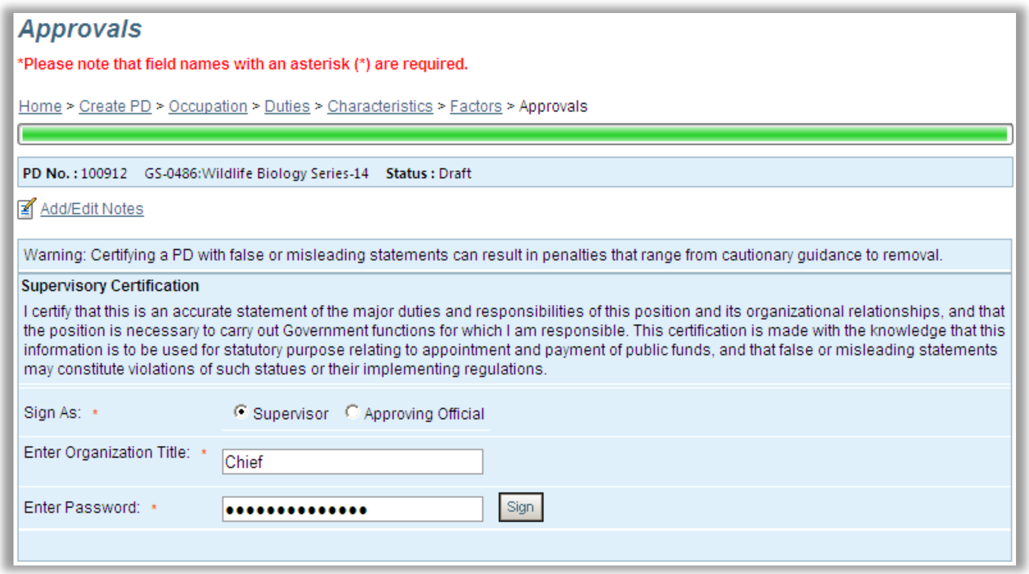
As the last step in *Draft* status, the PD Creator signs a PD before sending to HR for review.

During *Review/Final Review* an HR Evaluator and/or HR Classifier will also sign the PD to certify from an HR perspective. (For more in-depth information on Approvals, see Final Review in **Revise to Publish** module of this training, or **Evaluation and Classification** for HR users)

Our Hands-On activity compares online and print-outs of a Published PD. Therefore, the **Approval** screen is not necessary to display. In addition, the **Approval** screen is only available for users deemed Supervisors within the Service and HR personnel.

The screenshot below shows an example of an Approval screen for a PD ready to move from *Draft* to *Review* status.

Signatures are set when the logged-in user with Supervisor permissions, enters their title within the organization, and then correctly confirms their password before clicking **Sign**. (See **Revise to Publish** module for more on Approvals)

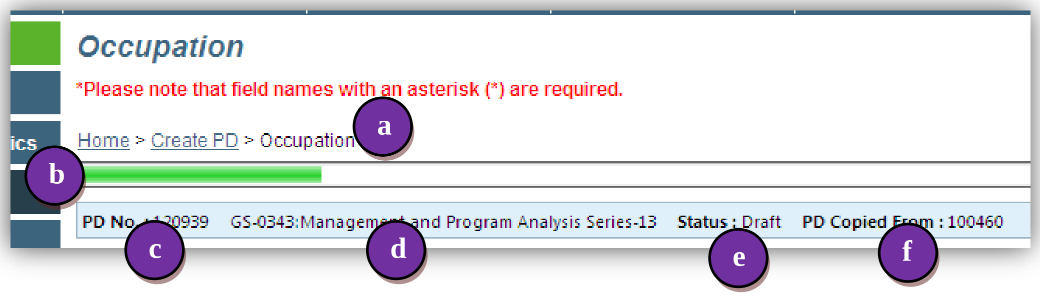


10. On which documents will you find supervisor certification?

Now that you've seen the PD Express creation screens let's move on to what creating a PD from an existing Published PD is all about.

The “Create PD” Interface

Before we create our first PD, let’s take a look at the visual cues and navigation in the ***Create PD*** interface. These interface features will appear at the top of each screen when viewing or editing a PD.



a. **Breadcrumb Trail**: provides a way to navigate back to previous screens

b. **Progress Bar:** as you complete the screens of the create PD process; the progress bar will fill with solid green. The progress bar is divided into 5 segments, to represent the 5 screens of PD creation.

c. **PD Number (PD No.):** an auto-generated number assigned to the PD upon saving data at the first step

d. **Title, Series and Grade:** displays on each screen as a reference to the PD you’re currently working on

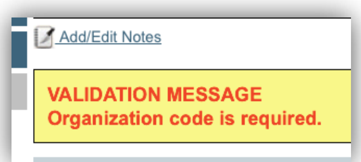
e. **Status:** a reminder of the current workflow status of your PD (see Workflow section of this module for more information)

f. **PD Copied From**: indicates the original PD number this PD was created from (could also be **Associated Full Performance PD**: PD number of the full performance position)

Required Fields*

Red asterisks indicate required fields. These fields are necessary elements of a PD. Often these fields determine automatic pre-population of related data. PD Express is designed to validate each screen before saving and moving on to the next screen. If a required field is missing, a yellow warning area will appear at the top of the screen with a validation message. All required fields must be completed properly before a PD can change status.

Incomplete required fields will result in a validation message as a reminder to complete all required fields.



HELP

Hover for Help

Help is available throughout PD Express and indicated by a green help icon. This online help provides definitions of terms to help you complete each field correctly and with confidence.

To access the help menu, hover over each help icon. Continuous slight movement of the mouse helps prevent the popup from disappearing before you are done reading.

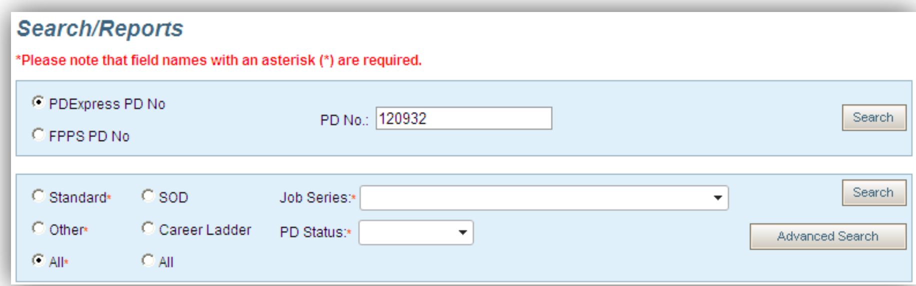
Create a PD Using an Existing Position Description

Imagine you have a need to fill an administrative position. Sure, there are a couple unique characteristics such as organization and employee location, but other than that, it is likely most job duties and responsibilities are similar to those outlined in an existing position description within the Service. PD Express lets you leverage/copy an existing position and edit details to generate your new PD! All you need to do is click **Create PD**.

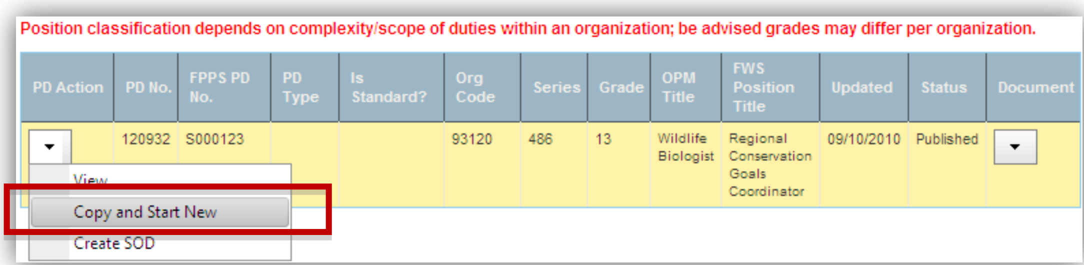
Your rights within PD Express will determine the number of options you have listed on the **Select Position Description Type** screen (ex. only HR has access to create a Standard Position Description). For your first PD, let's take the Express route!

Select **Create using Standard Position Description**, an option available to all active users of PD Express.

Upon clicking **Continue**, you will be taken to **Search/Reports** where you can search for the *Published* PD/SPD to use as basis for your new PD. You can use the **Basic Search** or **Advanced Search** to locate and remember, if you are unsure about type, select **All**. For our example we will use published PD **120932** to create a new one.



Once you locate the PD, move your mouse over the PD Action menu. Since this is a *Published* PD, you will find an option to **Copy & Start New**. Select this option.



ON TRACK…

Copy a PD or SPD?

PD Express makes it easy to start a new PD based on an existing PD *or* SPD. How do you know which to use?

SPDs are created by HR and tend to be a bit more generic for reuse across the entire service. Unique **PDs**, in contrast, are aligned to a specific Region and Organization Code.

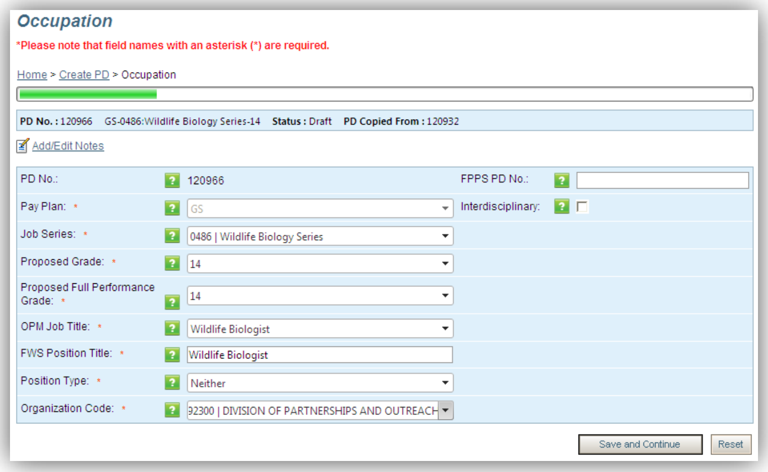
We encouraged you to use the most relevant to your position and remember that creating from existing PDs requires only one Supervisor signature.

Modifying Your New PD

The **Occupation** screen is the first screen to modify when creating a PD.

It is worth pointing out a few aspects of the occupation screen that are unique due to the fact this PD is based on an existing *Published* PD.

- Fields are pre-populated based on data from the original PD
- Non-editable fields: data in these fields is set by OPM and cannot be changed (i.e. **Pay Plan**)



Field Pre-Population

The data from the original PD is automatically pre-populated into the required fields. You can modify any active field on this screen. For our example, we will address two *required* fields in need of our attention: **FWS Position Title** and **Organization Code**. The remainder will be covered in the **Create New PD** portion of this manual.

FWS Position Title

The **FWS Position Title** field is a direct text entry field. This title is the job title commonly used within the Service. It may be the same as the **OPM Job Title**, or unique to FWS. Click into the text area and begin typing to edit this title.

Organization Code

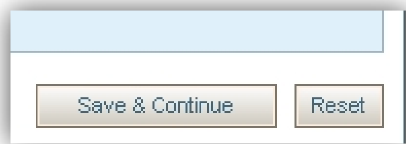
The **organization code**(s) available in your list is determined by your account settings. Only the **organization codes** to which you have access will appear. To select, click the drop-down menu, and select the appropriate organization name and code.

HELP

Missing Org Codes?

PD Express automatically assigned **Organization Codes** when you were initially set up. For additional assignment (or removal) of codes, please contact your **Regional Administrator** by clicking **Support Desk** and logging a request in the PD Express Issue Tracker.

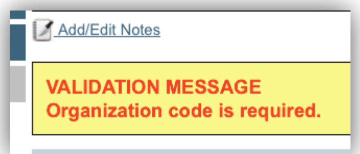
Save & Continue



The Reset button will set all fields back to their original last-saved state. Use this when you want to revert back to the data pre-populated by the original PD before your first save.

To save your changes to the **Occupation** screen, click **Save & Continue**.

Validation



If you forget to populate a required field, PD Express will present a validation message indicating necessary changes before moving on to the next step.

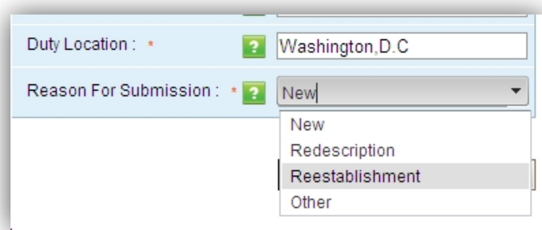
Your PD is Editable

If you forget something on the **Occupation** screen, don't worry. You can come back to this screen and edit while your PD is in *Draft* or *Revise* status. Use the left side menu to return to the **Occupation** screen.

You can view *all* pre-populated fields and screens from the left-side menu. Since your PD is based on an existing PD, fields have been pre-populated with information from the copied PD. The majority of required fields are completed, and if any data happens to be missing, the validation will catch the problem before submitting for *Review*.

PD…Express!

Remember our example? All we set out to do with our new PD was to change the FWS Position Title, Org Code and work location of the position. The Duties and Factors are identical to the PD we copied. We could edit the data, but for our example, we will leave it as-is.

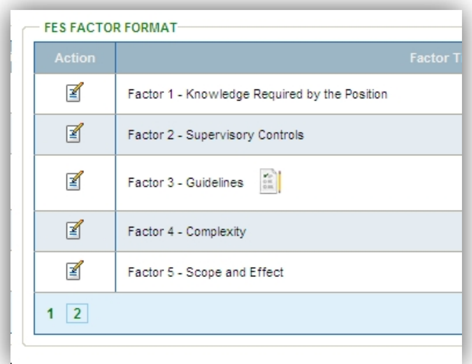


We can click each screen to verify the information by selecting **Save and Continue** at the bottom of each screen.

When we get to the **Characteristics** screen, required fields will need our attention: **Second Subdivision, Subject to IA Action, Employee Office Location**, **Duty Location**, and the **Reason for Submission**.

Once data is correct, click **Save and Continue** to move on to the **Factors** screen.

View, Edit and Save Factors

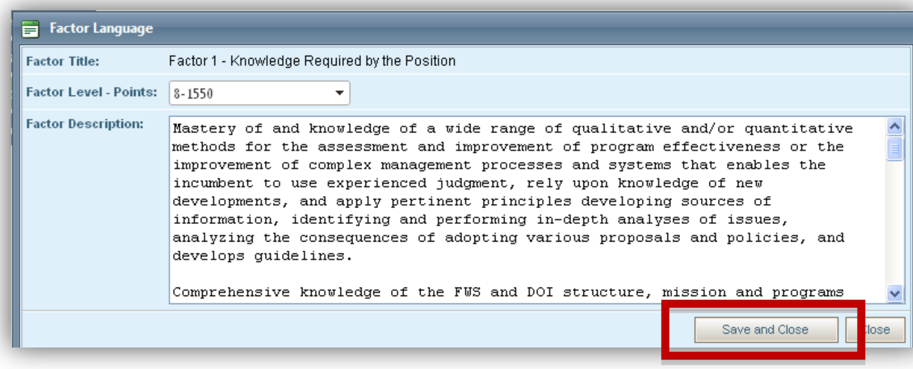


An important and necessary step in PD creation is to **review**, **edit** and **save** factor language. This drives the calculation of the **Grade Conversion** on your PD.

Open each Factor by clicking on the **edit icon** in the **Action** column.

The icon in to the right of the Factor Title indicates saved factors.

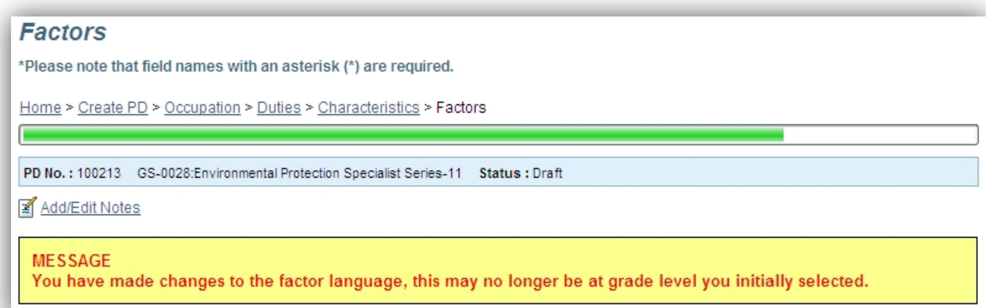
Factor Language is presented based on either the PD you copied, or the **Job Series** and **Grade** selected on the **Occupation** screen of a new PD.



When editing **Factor Language**, the PD Creator has the option to **save** as-is, or modify the **Factor Language**.

View and **Edit** the factor language and click **Save and Close** to save work and return to the list of **Factors**. Be sure to review all **Factor Language** and edit to support your specific position.

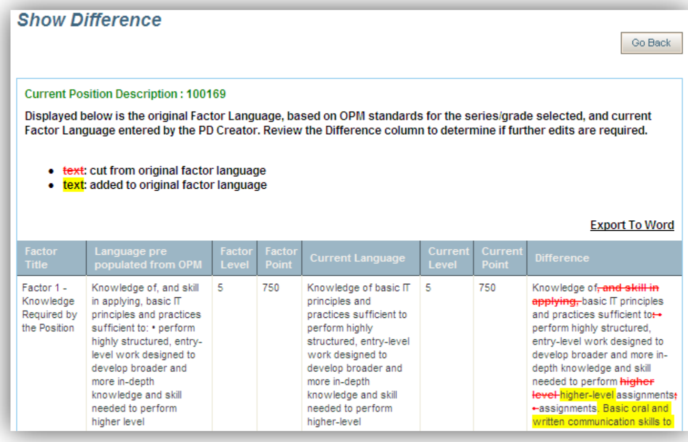
When language is modified, PD Express will present a message at the top of the screen. Changes in language may have an impact on the application of the factor at the chosen grade level.



Show Difference

The quickest way to view the factors is to click **Show Difference**. Using this method, you can compare the original PD or default factor text as well as your current factor language, and then return to the **Factor** screen to edit. As the button name suggests, the **Show Difference** screen will highlight the differences in your current language.

- If the factor language is edited in the new PD, the differences are shown as highlighted/strikethrough/red-bold in the **Difference** column



Show Difference

Go Back

Current Position Description : 100169

Displayed below is the original Factor Language, based on OPM standards for the series/grade selected, and current Factor Language entered by the PD Creator. Review the Difference column to determine if further edits are required.

- ~~text~~: cut from original factor language
- text: added to original factor language

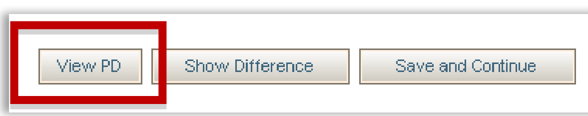
Export To Word

Factor Title	Language pre populated from OPM	Factor Level	Factor Point	Current Language	Current Level	Current Point	Difference
Factor 1 - Knowledge Required by the Position	Knowledge of, and skill in applying, basic IT principles and practices sufficient to: • perform highly structured, entry-level work designed to develop broader and more in-depth knowledge and skill needed to perform higher level	5	750	Knowledge of basic IT principles and practices sufficient to perform highly structured, entry-level work designed to develop broader and more in-depth knowledge and skill needed to perform higher-level	5	750	Knowledge of~~, and skill in applying,~~ basic IT principles and practices sufficient to~~: •~~ perform highly structured, entry-level work designed to develop broader and more in-depth knowledge and skill needed to perform ~~higher level~~ higher-level assignments~~; •~~assignments. Basic oral and written communication skills to

- Also note the **Export to Word** functionality in the top right corner. Clicking this link will create a Word document that contains your factor language.

View the Position Description

The **View PD** button at the bottom of the factors screen will generate a **PDF Position Description** document formatted just like the Position Description document from the **Search** result list.



From this PDF, you can view not only the factor language, but your entire **Position Description**. This is a great way to proofread your work.

We are down to the final steps in the creation of our Draft PD from an existing *Published* PD. Here's what we have left to do:

- **Save and Continue** on **Factors** screen to validate
- **Approval** screen (Supervisor and Approving Official, as needed)

ON TRACK...

Seeing Red?

When you select **Show Difference**, if you see a lot of unexpected red strikethrough text in the Difference column, it usually indicates you have not yet saved the Factor Language.

Basically what PD Express is trying to tell you is text from the suggested Factor Language is not found in your PD Factors.

Validate a PD

On the **Factors** screen, click the **Save and Continue** button.

PD Express will validate the entire PD for completion of required information. If anything is missing, a validation message appears. Errors and omissions must be corrected. Only complete PDs can be signed and move on to *Review* status.

Remember, we started with a simple example. Our PD was created using a *Published* PD and we made minor changes in **FWS Position Title**, **Locations** and **Organization Code**.

Approvals

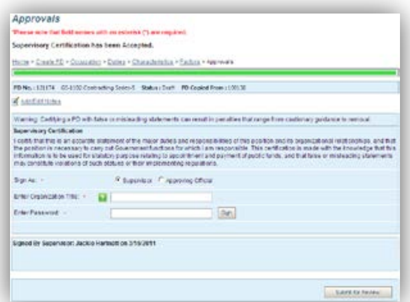
In order for a PD to move from *Draft* status to *Review* status, a PD Express user with the role of **Supervisor** must sign it.

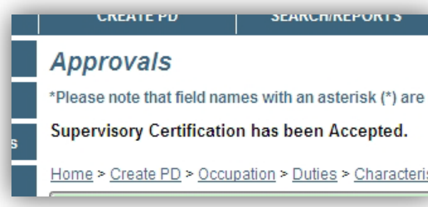
A **Supervisor** creating a PD can sign it, but if a person without Supervisor access creates the PD, they will need to notify their Supervisor when the PD is ready for signature. In most cases, a PD created from an existing *Published* PD only needs one signature; however an **Approving Official** signature is required when the PD is for a high-grade position (grade 14 or higher).

Sign and Submit for Review

If all required information has been validated on the Factors screen, and you have rights to sign a PD, selecting **Save and Continue** will open the **Approvals** screen.

On the **Approvals** screen, select the **Supervisor** button and enter your job title in the **Organization Title** field. Enter your PD Express **Password**, and click **Sign**.





PD Express will present a message confirming the acceptance of the signature. If all signatures are complete, you can **Submit for Review**.

Monitor Progress

Once submitted to HR for Review, you can view your PD in Read-Only mode. Your PD will appear in your "My Tracker" dashboard where **Status** and **Schedule** can be monitored.

ON TRACK…

Supervisor Signature

Users deemed FWS Supervisors may sign their own PDs.

For PDs created from existing PDs or SPDs, only one Supervisor signature is required. New PDs will require a second, Approving Official signature.

Users without FWS Supervisor status do not have rights to sign PDs. To keep your PD moving through the workflow on schedule, these users should notify their Supervisor and Approving Official as soon as the PD is ready for signatures. This can be done in person, via phone or email with a reference to the PD number and urgency regarding current workflow schedule.

Activity 5 – Create a PD (using a *Published* SPD)

Part 1 – Create PD from Existing

1. Click **Create PD** from the top menu buttons
2. Select **Create using Standard Position Description,** click **Continue**
3. **Search** for Published **SPD** (Reference B)
4. Choose **Copy & Start New** from **PD Action** column on left
5. Record your new **PD number** as **Reference C** on your Activity Sheet
6. On Occupation screen, select an **Organization Code,** click **Save and Continue**
7. On **Duties** screen, update the **Introduction Statement** to include 1 sentence about your position (as we're in Training, you can make it up)
8. Click **Save and Continue**
9. **Review** information on Characteristics screen, click **Save and Continue**
10. **Review,** information on Factors screen, click **View PD**
11. **Open the PDF** document and verify your new Org Code is present
12. Navigate back to PD Express and click **Save and Continue** to navigate to **Approvals** screen

HANDS ON…

Goal:

Create a PD from an SPD

Using the following scenario; create a PD from existing SPD.

Use **Reference B** from your Activity Reference Sheet to complete this activity.

Record the PD# of your new PD as **Reference C** in your Activity Reference Sheet.

Extra Credit: Use Help Icons

Find 2 fields with **Help Icons** and read the help details

Pause to confirm:

- Your PD is assigned a **PD Number**. Record this number as Reference C on your Activity Reference Sheet. You will need it for upcoming activities.
- The **title**, **job series** and **grade** display on the information bar
- Your PD is in *Draft* status

Part 2 – Sign and Submit for Review

13. On **Approvals** screen, select **Supervisor** and **enter your password**
14. Click **Sign**
15. Click **Submit for Review**

Congratulations! You created your first PD and sent it for Review.

It really is simple to create a PD from an existing PD or SPD, especially when the changes are minor!

You will likely run into situations where changes are more complex, but now that you have the basics, you are ready to move on to creating a new PD from scratch, viewing reviewer notes, making revisions and submitting for *Final Review.*

U.S. Fish and Wildlife Service PD EXPRESS

PD Express: Introduction for Hiring Managers, HR and Admins

Module 3 – *Create to Review*

CREATE TO REVIEW

About this Module

What you will See

The content in this module explains the following PD Express features and functionality:

- Standard Position Description (SPD) and PD differences
- Occupation screen
- Duties screen
- Characteristics screen
- Factors Screen: Evaluation Factors, Grade Conversion calculation
- Evaluation Statement
- Setting a new PD to *Review* Status

What you will Do:

1. Create a New PD (from scratch) starting with the Occupation Screen
2. Add Duties to your PD
3. Edit Duties
4. Add Qualifications to your PD
5. Complete required fields on the Characteristics screen
6. Add and Edit Factor Language
7. Submit a PD for *Review*

https://pdexpress.fws.doi.net/training

Standard Position Description (SPD) vs. Position Description (PD)

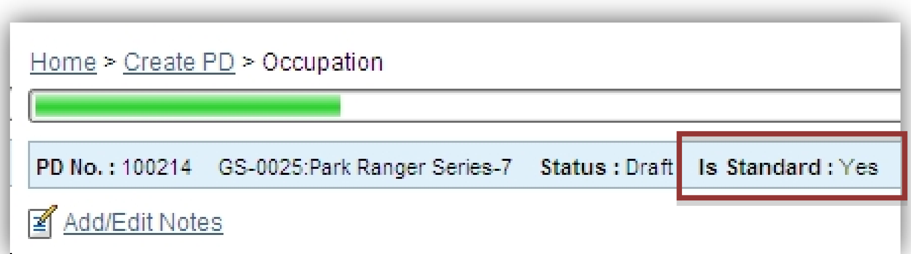
Standard Position Descriptions (SPDs) describe positions whose duties are suitable for establishment across various regions within the Service while PDs are for positions within a specific Region and Organization.

While Position Descriptions (PDs) can be created by any PD Express user, only HR users have access to create Standard Position Descriptions (SPDs). On the **Create PD** screen, the option is listed, but is grey and not clickable for all non-HR users.

If you are a non-HR user, select **Create New Position Description** and follow along.

PDs and SPDs are treated similarly in PD Express, in that both are searchable and can be used as the basis for a new PD. The key differences between a PD and SPD are most evident during the creation process as some fields are not required on an SPD:

- **Organization Code** is not required on an SPD but is required on a PD
- As **Organization Code** is not selected on an SPD, the **Introduction Statement** of the SPD must be manually entered
- **Office Location** and **Duty Location** are not required on an SPD, but are required on a PD
- **Supervisor Approval** is not required on an SPD because the SPD comes directly from HR
- An SPD is distinguished by **Is Standard: Yes** on the information bar



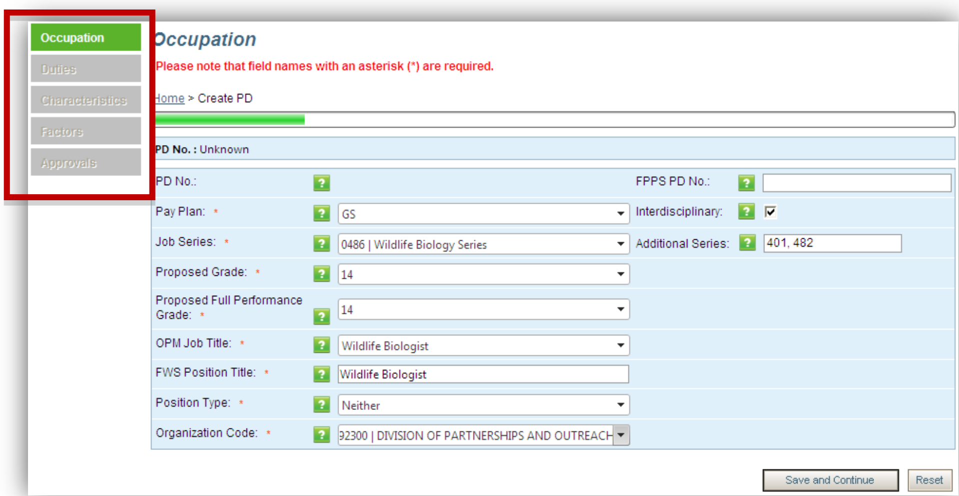
Create a New PD from Scratch

A new position may be so unique that no existing *Published* SPD or PD comes close to the **Job Series, Grade, Duties, Characteristics** and **Factors** needed. As the PD Express Library grows, this case will become rarer. However, there will be times when a new PD must be created from scratch.

From the Create PD menu, select **Create New Position Description** and click **Continue**.

Occupation Screen

When starting a New PD, the **Occupation** screen is the first screen shown. Notice the PD Number (**PD No.**) will read "Unknown" until you submit all the required fields presented on this screen. Once PD Express assigns this unique PD number, it will display as a non-editable field. ***The PD Number (PD No.) cannot be changed.***



HELP

Field Restrictions

Because of dependencies between fields, once submitted, Pay Plan cannot be modified. A change to this data field requires the creation of a new PD.

Note that 4 of 5 PD screen navigation buttons are gray. This is because the PD has not yet been saved, nor assigned a PD number (PD No.).

The order of field selection on the **Occupation** screen is important. Selection of the **Pay Plan** determines the options in **Job Series**; which then drives the options for **Proposed Grade**, **Proposed Full Performance Grade** and **OPM Job Title**. Selection of the **Position Type** enables the pre-populated **Equal Employment Opportunity/Diversity Statement (EEOD)** text – populated for **Supervisory** or **Managerial** positions only.

Additionally, you'll notice the **Interdisciplinary** checkbox. Select this if the PD should be interdisciplinary and indicate the **Additional Job Series** in the text box provided.

ON TRACK…

Interdisciplinary PDs

If the duties of the position can be performed within more than one Job Series, the PD can be labeled interdisciplinary.

Select this optional checkbox, indicate the Additional Job Series and HR will help you create the additional PDs and recruit.

ON TRACK…

New PD or use existing?

It might be tricky to know whether you should start your PD based on an existing PD, or start new from scratch, especially when first starting with PD Express.

One way to tell if a PD exists in the system is to perform a search by **Job Series** and **Grade** before you begin your PD.

PD Express performs this search for you each time you start a new PD from scratch! If a PD with the same **Job Series** or **Grade** already exists in the system, PD Express will offer the option to create using an existing PD instead.

A blank drop-down list may be due to prior fields having no selected value.

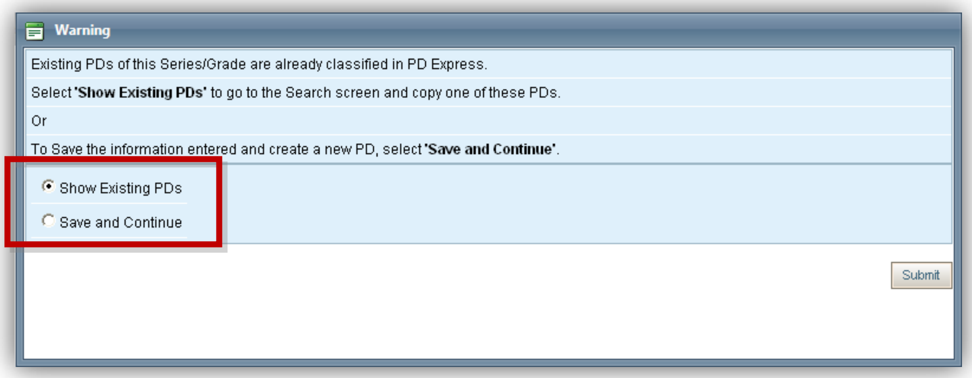
The **Organization Codes** displayed are determined by your account settings. Only the codes to which you have access will appear in your list.

Some Fields on this screen allow for direct entry of text using your keyboard.

1. **FPPS PD No.** – Holds legacy PD numbering or unique identifier beyond the PD Number generated by PD Express. This field is optional to Hiring Managers.
2. **FWS Position Title** – This field holds the job title commonly used within the Service and is pre-populated with the **OPM Job Title**, once selected. Change the title if necessary by typing directly into the text box.
3. **Additional Series** – if **Interdisciplinary** is selected, this field is required. Use this field to indicate the additional **Job Series** to include on Interdisciplinary PDs.

Complete the proper fields for your PD and click **Save and Continue**.

PD Express will run a validation of information entered on the Occupation screen against the PD Express Library. If a PD or SPD matching the criteria entered on the **Occupation** screen is found, you will be presented with a pop-up screen stating "There are similar PDs in PD Express…" This is an indication you can create from an existing PD!



Select **Show Existing PDs** and **Submit** to review possible matches from the search screen. If PD Express does not find a potential match, you will advance to the next screen.

Or, if you are sure the only option is to start a new PD from scratch, select **Save and Continue** and click **Submit** to move on to the **Duties** screen.

The following hands-on activities begin the process of creating a new PD. The PD created in these activities will be used throughout this module.

Activity 1 – Create New PD: Occupation Screen

1. Click **Create PD** from the PD Express menu
2. Select **Create New Position Description**, click **Continue**
3. Select "GS" from the **Pay Plan** list
4. Select "486 – Wildlife Biology Series" from the **Job Series**
5. Select a **Proposed Grade** of "14"
6. Select a **Proposed Full Performance Grade** of "14"
7. Select **OPM Position Title**, note the pre-populated **FWS Position Title**
8. Update the **FWS Position Title** to "Supervisor Wildlife Biologist"
9. Select **Position Type** of "Supervisory"
10. Select an **Organization Code**
11. Verify the **EEO/Diversity Statement** appears
12. Click **Save and Continue**
13. When prompted to create from existing, select **Save Continue** again and click **Submit** to move on and create a new PD from scratch
14. **Record** your new PD Number **as Reference D**

HANDS ON…

Goal:

Start a new PD (from scratch)

Create a Supervisory, grade 14 PD

Upon **Save**, your PD is assigned a PD number. Locate the number in the area beneath the progress bar.

Record the PD# as **Reference D** in your activity log.

Take Notice:

- Your PD has now been assigned a **PD Number** by the tool
- The **Title**, **Job Series** and **Grade** display next to the PD Number
- Your PD is in *Draft* status

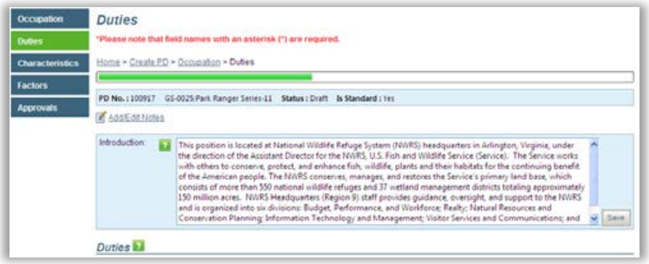
Adding Duties to your PD

> **HELP**
>
> **Remember to Save**
>
> Once text has been entered into the Duties Introduction field, remember to click the **Save** button.
>
> **Click the Checkmark!**
>
> The checkmark saves the content of the Duty. Don't forget to click the checkmark!

Introduction Statement

In most cases, default **Introduction Statement** text will pre-populate based on the **Organization Code** entered on the **Occupation** screen. It is important to update the **Introduction Statement** as the default text likely does not fully explain the position.

Type directly into the **Introduction** text box to edit the statement or copy text from other applications like Word, and paste into the field. Be sure to click **Save**.



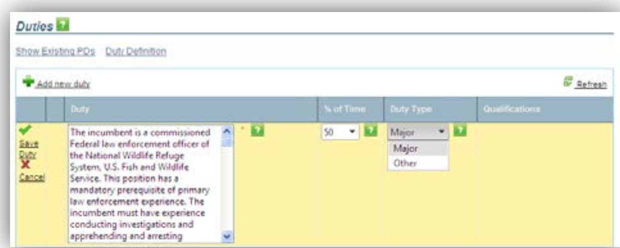
An edit to the pre-populated text will only apply to the PD you are currently working on. If the default statement for the organization code requires update, contact your Regional Administrator via the **Support Desk** link.

> **ON TRACK…**
>
> **% of Time by Duty Type**
>
> **Major**
>
> % of time for duties categorized as "Major" **must total to 100%** in order to move PD past *Draft* status.
>
> **Other**
>
> A duty categorized as "Other" must have a % of time equal to zero.

Add a new Duty

Duties are defined as **Major** and **Other** job responsibilities performed in the position.

Unlike creating from an existing PD, a new PD has no associated duties. Click the **Add new duty** link to enter new position duties.

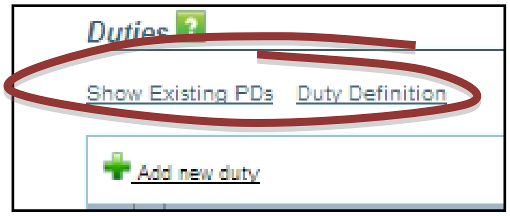


To **Add a New Duty**:

1. Enter the **description** of the duty by directly typing / pasting into **Duty** field
2. Choose **% of Time** and **Duty Type** indicating the percentage of time demanded to perform the position duty
   a. **Major** duties represent the primary reason for the position's existence and should total 100%
   b. **Other** duties may be listed as appropriate and must be 0% of time
3. Click the **checkmark icon** Add Duty to **save** or the Cancel to **cancel**

Leverage Resources to Add Duties

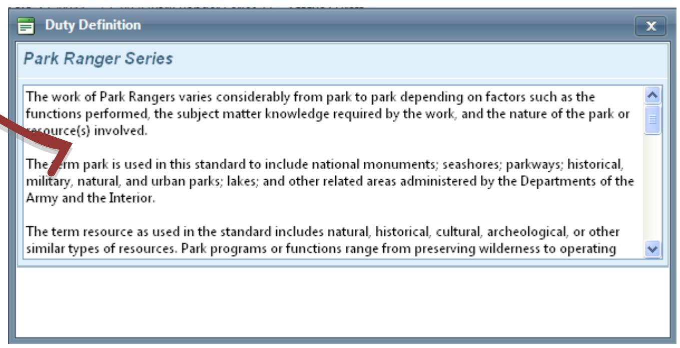
In addition to direct text entry, you can leverage existing content to add new duties to your PD. Beneath the Duties heading you will find two options: **Duty Definition** and **Show Existing PDs**.



Duty Definition

The **Duty Definition** contains duties suggested by OPM for a given series if available. Use the text in the duty definition as your duty statements, or as the basis for new duties.

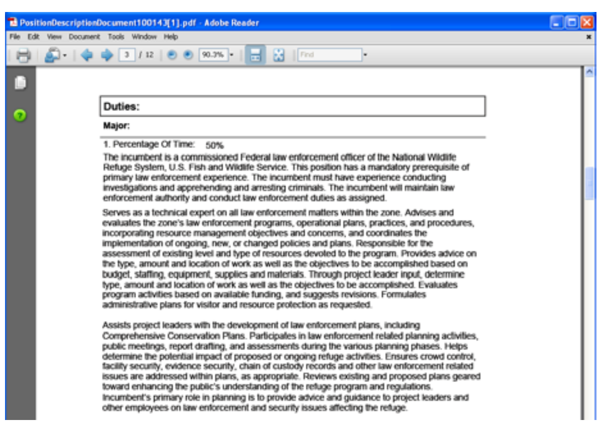
Copy and Paste directly from here!



Show Existing PDs

Duties are often similar from one position to another. **Show Existing PDs** allows you to search and view published PDs that may have similar duties.

1. PD Express will search for you by the **Grade** and **Job Series** of your new PD
2. From the **Search** results, click the **Position Description PDF** from the **Document** column and **Open** the PDF
3. Locate and copy the text of the duty and paste the selected text into the duties description field.



HELP

Select, Copy & Paste

Select text by dragging your cursor over the words and sentences. The background color of the text will change to indicate selection (highlighting).

Now right-click and choose **copy** or use the keystrokes for copy: (**ctrl + c**)

Now the selected text is on your computer's clipboard ready to be pasted in the Duty Description field.

To paste, click into the duty description field, right click and choose **paste**, or use the keystroke for paste: (**ctrl + v**)

Activity 2 – Add New Duty

Upon completion of this activity, you will have demonstrated the steps to add a Duty to a PD. This activity uses Reference D, created in this module.

HANDS ON…

Goal:

Update Introduction Statement

Add 3 New Duties

Use **Reference D** from your Activity Log to complete this activity.

Duty 1

Duty Text: "This is my test duty for my new PD"

Duty 2

Duty Text: Use text from Duty Definition

Duty 3

Duty Text: Use text from a Published PD

Challenge Questions:

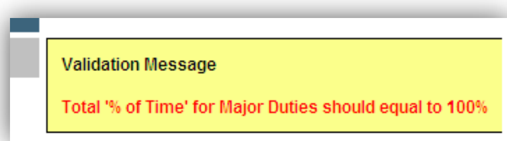
a. What happens if an "other" duty with a % time > 0 is added?
b. Will the system allow duties with total % time at 120%?

1. Use the breadcrumb trail or left side menu to open the **Duties** Screen
2. Update the **Introduction Statement** to include a sentence about your position
3. Click **Save** to save updates to your Introduction
4. (For Duty 1) Click **Add new duty**
5. **Enter text** "This is my test duty for my new PD" directly into the Duty field. This is just a test example, so exact text is not critical.
6. Select "25" as **% of Time** and "Major" as the **Type**
7. **Click the checkmark** to add the duty. Remember: If you do not click the checkmark, your duty will not be added
8. (For Duty 2) Click **Add new duty** link
9. Click the **Duty Definition** link
10. **Copy** a portion (or all) of the text
11. **Close** the Duty Definition popup window
12. **Paste** the selected text into the **Duty Description** field
13. Choose "25" as **% of Time** and **Type** "Major"
14. **Click the checkmark** to add the duty
15. (For Duty 3) Click **Add new duty** link
16. Click the **Show Existing PDs** link
17. Select a PD from the search results and **View** the searched PDF document
18. **Copy text** <ctrl+c> from the duties section of the PDF
19. Return to the **Duties** screen on PD Express
20. **Paste** <ctrl+v> the selected text into the **Duty description** field
21. Choose "50" as **% of time** and **Type** "Major"
22. **Click the checkmark** to add the duty to the PD

Challenge Question Answers:

a. Only Major duties can have % of Time associated to them, so you will get an error when trying to assign anything but 0% to an **Other** duty

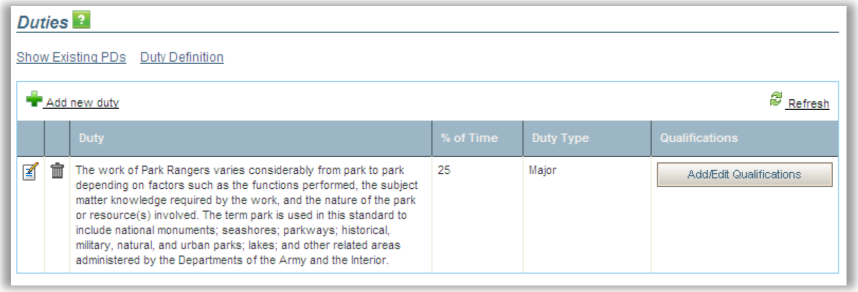
b. PD Express validates the duties screen and will show a message preventing you from moving on until major duties total percentage equal to 100%.



Edit and Delete

Once the duty has been saved, the screen will display your duty text, plus a couple of icons:

- **Edit the Duty** – Click to edit **Duty description**, **% of Time** and Duty **Type**
- **Delete the Duty** – Click to completely remove Duty from the PD



Hiring Managers can edit duties during *Draft* or *Revise* status at any point prior to submitting to HR for review. Simply access the **Duties** screen and select to either edit the duty or remove it from the PD by clicking the trash can icon.

As a note, PD Express will order your duties based on their percentage of time. Those with a higher percentage of time will appear toward the top of the screen, while those with lesser amounts of time will be nearer to the bottom.

Activity 3 – Edit Duties

Upon completion of this activity, you will have demonstrated the steps to update a Duty. This activity will continue the creation of a new PD started at the beginning of the module. Use the icons shown above to edit the duties of your PD.

1. Click the **edit icon** of the second duty
2. Change **% of Time** to "30"
3. Click the **checkmark** to save the change
4. Repeat steps 1-3 for Duty 3, changing **% of Time** to "45"
5. **Add new duty** reading "Additional Duty" with "0" as **% of Time** and **Type** of "Other"
6. Click **Save and Continue** to validate the **Duties**. Clear any validation messages by further editing or deleting your **Duties**.
7. Click the **delete** icon to remove the duty reading "Additional Duty" – this should be type "Other"

HANDS ON…

***Goal*:**

Edit & Validate Duties

Set your duties to match the example on this page.

Use **Reference D** from your Activity Log to complete this activity.

Edit Duty

- % Time = 30

Edit Duty

- % Time = 45

Add Duty

- % Time = 0
- Type = Other

Optional: Delete "Other" Duty

ON TRACK…

Qualification Type

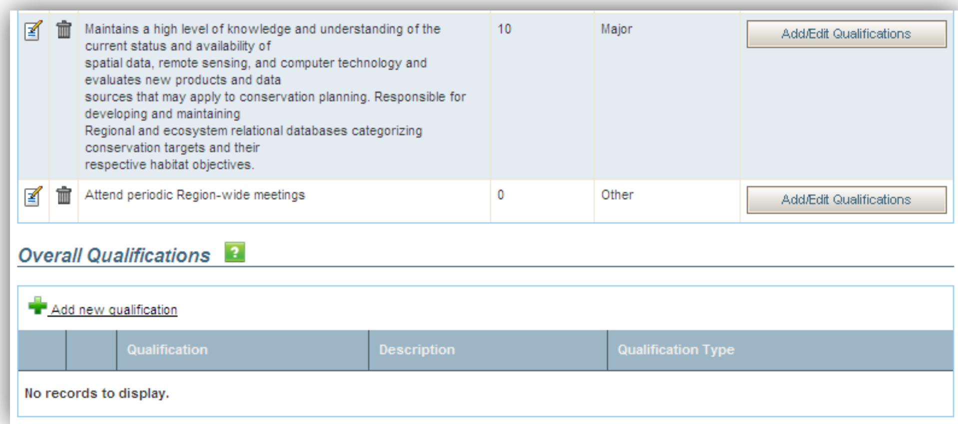
When adding **Qualifications**, you have two choices: **Duty Qualification** or **Overall Qualification**.

If the Qualification applies to just a single Duty, it should be added to the Duty. Otherwise, add it as an Overall Qualification.

Remember to include any Qualifications in Factor 1 of the chosen Factor Standard.

Qualifications

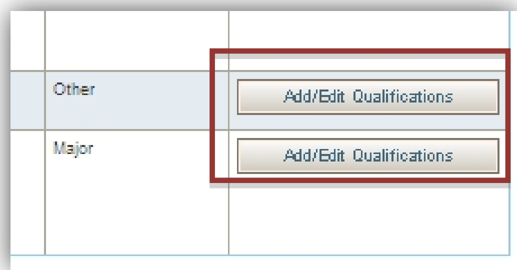
Once a duty is added to a PD, additional options to **Add/Edit Qualifications** appear on the Duties screen. Qualifications can be added to *each Duty*, as well as to the *overall PD.*



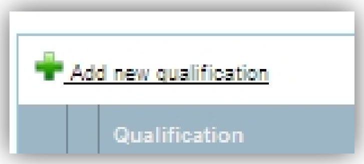
Add a Duty Qualification

The process of adding qualifications is essentially the same, whether adding a **Duty Qualification** or an **Overall Qualification**. You may notice that when adding a qualification to a specific Duty, you will be shown the **Add/Edit Qualifications for Duty** pop-up window. Here, your Duty text is displayed at the top of the pop-up window for reference. Let's take a look at how to add qualifications to a **Duty**:

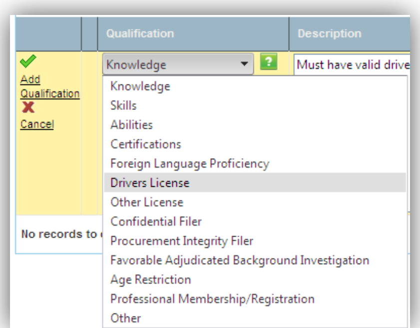
a. In the Qualifications column *for a Duty*, click the **Add/Edit Qualifications** button. This will add the qualification only to the single duty.



b. On the Add/Edit Qualifications For Duty pop-up window, click **Add new Qualification**



c. Choose the category of the **Qualification** as it relates to the **Duty**

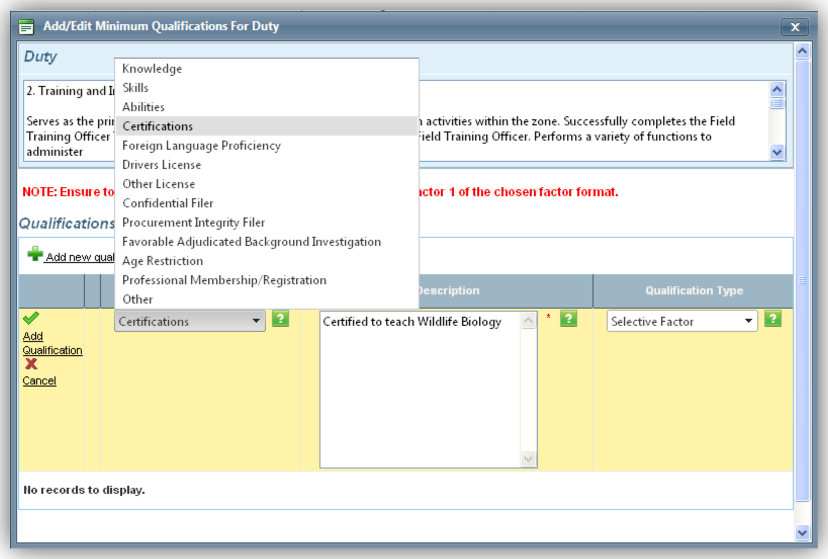


d. Type a brief description of the qualification. **Description** is a required field.

e. Choose a **Qualification Type**

f. Click the **checkmark** to add the qualification. Be sure the new qualification is saved before closing **the Add/Edit** window. The visual cues to indicate a saved qualification is the display of edit and delete icons.

g. Close the **Add/Edit Qualifications For Duty** window by clicking the "**X**" in the top right corner of the popup window



Let's move on and learn more about Overall Qualifications.

ON TRACK...

Factor Type

A **Selective Factor** is required for the candidate to be considered for the position.

A **Quality Ranking Factor (QRF)** will help rank qualified candidates, as well as help determine performance evaluation. A candidate can still be considered for the position even if missing the listed QRF.

ON TRACK…

Switching a Qualification from Overall to Duty (or vice-versa)

You may decide after entering a qualification on a duty, that it actually is an Overall Qualification.

No problem!

1. Copy the text from the Duty Qualification
2. Add a new Overall Qualification and Paste text into the Description field
3. Delete the Duty Qualification that is no longer needed

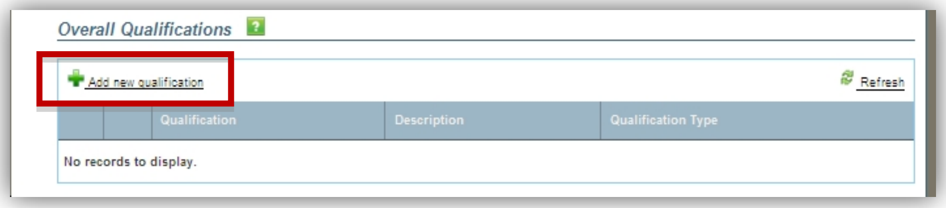
HELP

Remember to Save!

The left side menu is a convenient way to move between screens of a PD. However, the menu does not save changes on each screen. Be sure to click the **Save and Continue** button to ensure any and all updates are captured.

Add an Overall Qualification

To add **Overall Qualifications** to a PD, start by clicking **Add new qualification** on the lower section of the **Duties** Screen. Next, follow the same steps as when adding a duty qualification (steps c-f). The only difference is where the qualification appears on the screen and within print documents.



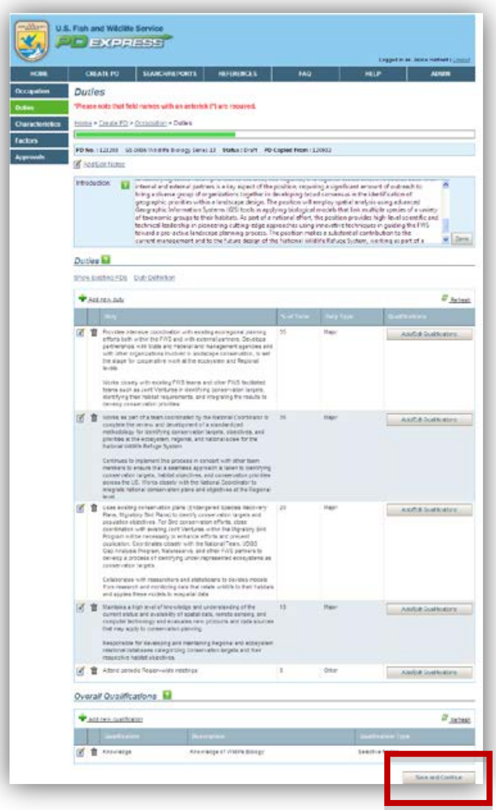
Edit, Delete, Refresh

Edit the **Qualification**, **Description** and **Qualification Type** using the **edit icon** .

Permanently remove the **Qualification** using the **delete icon** .

Save and Continue

Once all Duties and Qualifications are complete, you are ready to move on. Click **Save and Continue** to save changes on the **Duties** screen and navigate to the **Characteristics** screen.



Activity 4 – Add New Duty Qualifications

Upon completion of this two-part activity, you will have demonstrated the steps to add, edit and delete a **Qualification** associated with a Duty as well as add an **Overall Qualification** to a PD.

Part 1 - Add Qualifications to Duty 1 and Duty 2

1. Use the breadcrumb trail or left side menu to open the **Duties** screen
2. Locate the first **Duty**
3. In the **Qualifications** column, click **Add/Edit Qualifications**
4. Click the **Add new qualification** link
5. Select the **Qualification** as "Drivers License", enter a **Description** stating**,** "Valid Driver's License Required," and choose a **Qualification Type** of "Selective Factor"
6. **Click the checkmark** to add the qualification. Verify the addition of the Duty Qualification by looking for the **Edit** and **Delete** icons
7. **Close the Window** by clicking "**X**" in the top right corner
8. **Repeat steps 3-7**; this time add 2 qualifications to the *second* duty (Choose a qualification other than "Driver's License").

Part 2 - Add 1 Overall Qualification

9. Locate the first Duty
10. Click **Add/Edit Qualifications** next to that duty
11. Click the **edit icon** to access the "Drivers License" **Qualification**
12. Copy the text from the **Description** field
13. **Close** the Qualifications window
14. On the Overall Qualifications section, click the **Add new qualification** link
15. Select the **Qualification** as **"**Driver's License," and **paste** the text copied from the Duty 1 qualification into the **Description** field
16. Choose a **Qualification Type** of "Selective Factor"
17. **Click the checkmark** to add
18. Click **Add/Edit Qualification** for Duty 1 (from steps 10&11)
19. **Click the trash can** to delete the "Driver's license" Duty Qualification
20. **Close** the window
21. Click **Save and Continue**

Challenge Question Responses:

Method 1 – Search for the PD with qualifications you wish to reuse. Copy the onscreen text and paste into the qualifications field

Method 2 – Download the PDF version of the PD with the qualifications you wish to reuse. Copy the text from the PDF version and paste into your PD.

HANDS ON…

Goal:

Add & Edit Qualifications

Use **Reference C** from your Activity Log to complete this activity.

Add to Duty 1

Add 1 "Driver's License" Duty Qualification

Add to Duty 2

Add 2 additional Duty Qualifications (your choice)

Add 1 Overall Qualification

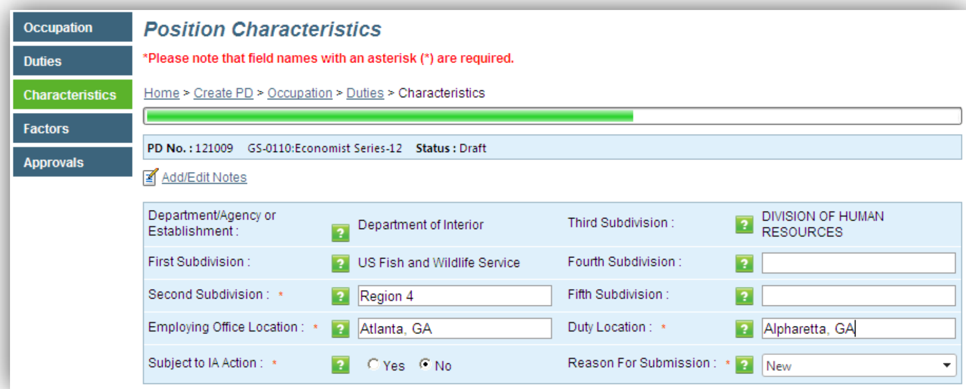
Change the "Driver's License" Qualification from a *Duty Qualification* to an *Overall Qualification*

Challenge Question

Imagine that an existing PD contains qualifications that will also be used in your new PD, describe the process to locate and reuse the specific Qualification description content.

Characteristics

The **Position Characterstics** screen contains two sections of information. The top section is available to PD Creators to add specifics about the employing **Division, Office Location**, and **Duty Location**. This screen is available for edit during both *Draft* and *Revise* statuses. The lower portion of the **Characteristics** screen is available during *Review* and *Final Review* to HR only and will be shown to PD Creators during *Revise* status in a read-only format, as these fields cannot be edited by Hiring Managers. For HR fields, please refer to the **Evaluation and Classification** module, available to HR users only.



Required and Optional Fields

- **Department/Agency -** pre-populated with "Department of Interior," this field is *required* and *not* editable
- **First Subdivision -** pre-populated with "US Fish and Wildlife Service," this field is *required* and *not* editable
- **Second Subdivision** - pre-populated based on the **Region** of the PD Creator. This field is *required* and editable. Be sure to update based on the position.
- **Third Subdivision** - pre-populated based on the **Organziation Code** chosen on the **Occupation** screen. This field is *required* and editable. Return to the **Occupation** screen to edit this data, if necessary.
- **Fourth and Fifth Subdivision -** available for direct text entry, these are *optional*, editable fields
- **EmployingOffice Location -** pre-populated with the city and state of the PD Creator, this field describes the office location of the position. This is a *required*, and editable field.
- **Duty Location -** pre-populated with the city and state of the PD Creator, this field describes the physical location where the work will be performed. This is a *required*, and editable field.
- **Reason for Submission -** a *required*, and editable field that, by default, displays "New." Be sure to select the appropriate option before saving.
- **Subject to IA Action -** a *required*, and editable field that defaults to "No"

Evaluation Guide Factor Format

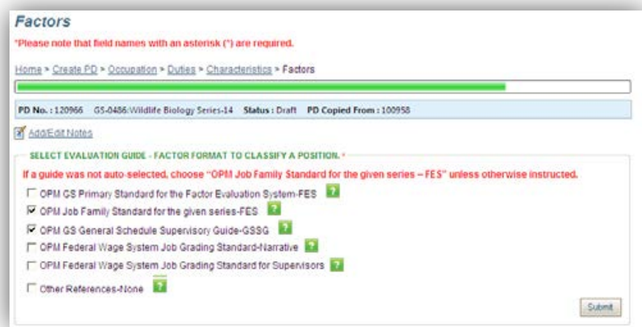
Unless your new PD is based on an existing PD or SPD, it will start in *Draft* status with a recommended **Factor Evaluation Guide Language**.

PD Express auto-selects an **Evaluation Guide - Factor Format** to classify the position based on the **Job Series**, **Grade** and **Position Type** you selected on the Occupation screen.

For all New PDs, New SPDs and Career Ladder PDs, PD Express will default the most appropriate Factor Evaluation Guide (aka Factor Standard) on the **Factors** screen. Users will need to click into each Factor to edit and save the language to best support of their specific position.

Multiple **Factor Evaluation Guides** can be selected in order to use multiple sets of factors. If you think your PD may need to be classified using a different guide, it is best practice to contact your local Human Resources office to verify which **Factor Evaluation Guide** should be used. Most General Schedule (GS) positions will use either the FES or GSSG guides while Wage Grade (WG) position will use the Narrative or Narrative Supervisory guides.

The below example shows the two most commonly used guides.



If you need help, refer to the help icons for details on when to use which guide.

- Click the **checkbox** to select the corresponding Evaluation Guide
- Click the **Submit** button to load the Factors to the page

Factor Evaluation System (FES) pre-populates factors based on **Grade** and **Job Series** chosen on the **Occupation** screen and total points for **Grade Conversion Range** are based on the **Proposed Full Performance Grade.** The **General Schedule Supervisory Guide (GSSG)** Factor Evaluation defaults to the lowest level and points of each factor.

ON TRACK…

Which Guide to Choose?

PD Express will auto-select the most appropriate Factor Evaluation Guide for all new PDs (from scratch), SPDs and CLPDs.

If for some reason the guide is not auto-selected, most commonly, the **OPM Job Family Standard for a given series-FES** is the best choice for non-supervisory positions. It is also most commonly used for white collar positions.

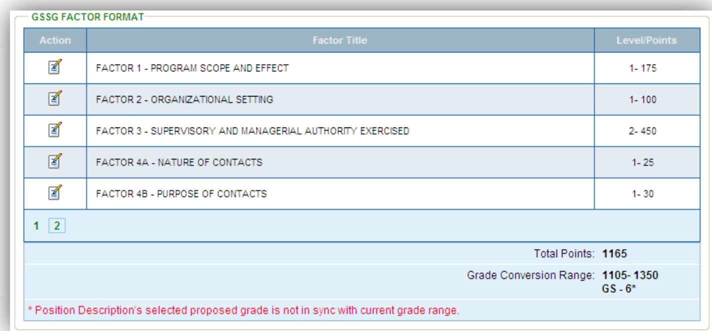
If your position is Supervisory, you'll most likely want to use the **General Schedule Supervisory Guide-GSSG**.

OPM **Federal Wage System Job Grading Standards-Narrative** is most often used for blue-collar positions.

If the series selected does not pre-populate with factor language, use the **GS Primary Standard** instead.

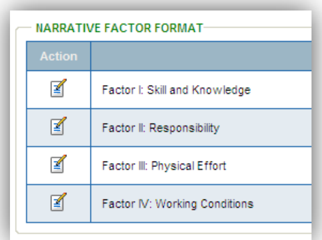
When in doubt, use the online help icons to clarify, or contact your local HR staff.

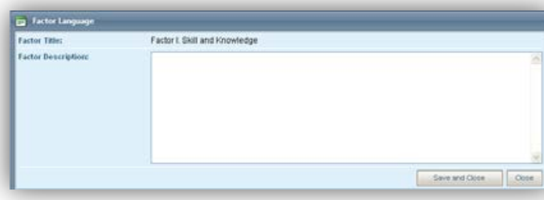
You will also notice a **Grade Conversion Range** is displayed at the bottom of this section. You will need to modify the levels and points within each Factor to match the defined **Grade**.



When you click the **edit icon** to review and update your factor language, you may notice that **Factor Language** is pre-populated with text. This pre-populated text is OPM compliant text to match the selected **Job Series**. PD Express provides language to support your PD **Job Series** and **Grade** when it is available from OPM.

In the **Narrative** and **Narrative Supervisory** evaluation guides, the individual factor language fields will be blank. It is the responsibility of the PD Creator to populate this information with the correct text. A sample of this field is below:





Click the **edit icon** to dive into each factor to review and update **Level - Points** as well as **Factor Language**. Remember to include any qualifications from the **Duties** screen into the text of Factor 1!

Viewing and Editing Factors

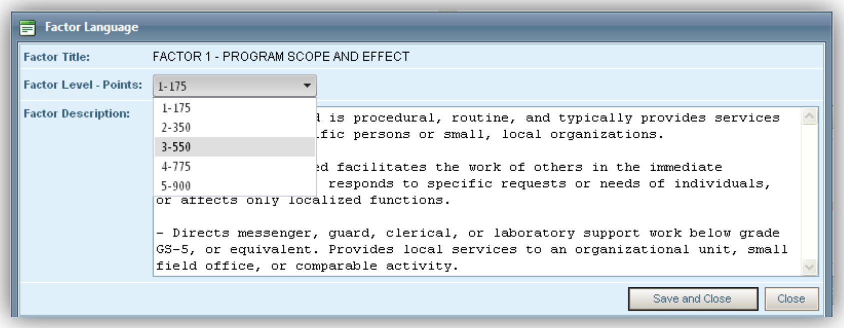
An **edit icon** for each Factor will display in the **Action** column of the Factor Format table. As mentioned, PD Express displays suggested **Factor Language** based on **Job Series**, **Grade** and **Factor Format** selected.

This language is suggested and available for our convenience. However, the language is not yet saved, nor complete.

Click on the **edit icon** to view or edit the details of each **Factor**.

Factor Language

The Factor Language dialog box contains the **Factor Title, Factor Level –Points** and **Factor Description**.



- Select a different **Factor Level-Points** from the drop-down to adjust the **Grade** calculation.
- Type or paste directly into the **Factor Description** text field to modify information
- Click the **Save and Close** button to save your changes, or the **Close** button to close the window *without saving changes*
- PD Express presents a message alerting you to changes in Factor information
- HR users can help you get your factor language in proper form during *Review* status and you will then be able to read what they updated and accept or reject the changes

HELP

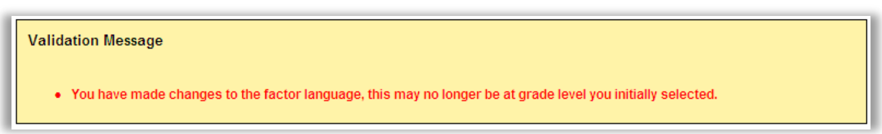
View and Save

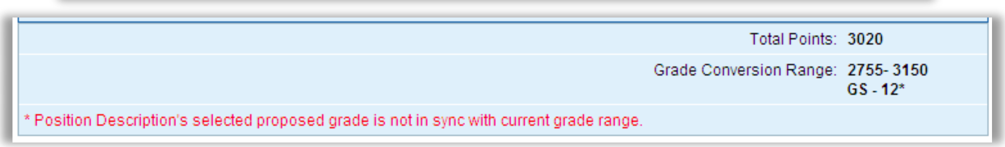
Remember to click the **edit icon** to review and save factor language. PD Express will validate all factor language has been saved.

Look for the icon indicating Factor Language has been saved.

Factor Validation

Changing **Factor Level-Points** may impact the **Grade Conversion Range**. A validation message will display on the Factor screen alerting a need for change in either the **Factor Level-Points** or **Proposed Grade** (previously selected on the **Occupation** Screen).





ON TRACK…

Editing Factors - Caution

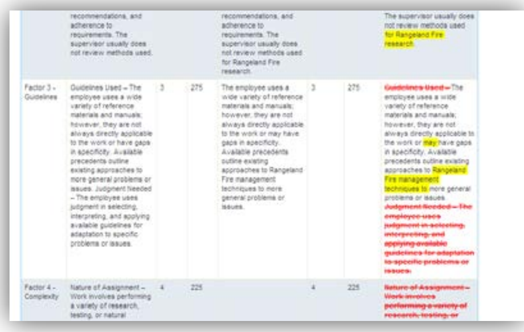
A change to the language in any factor without modifying the factor level may change the grade at which the position can be classified.

The **Show Difference** screen will highlight the changes between the default factor information and current language.

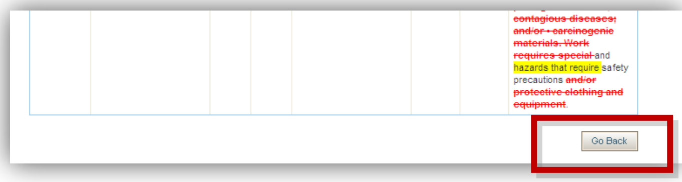
Use Show Difference to determine language that has not yet been saved. If you see complete sections of red/ strikethrough text in the Difference column it may be an indicator of unsaved factor language.

Show Difference Report

It is important to note that any change to the **proposed** or **full performance grade** on the **Occupation** screen may require changes to Factors. To quickly view the original pre-populated factor language alongside the current factor language, you can use the **Show Difference** report. Additions to original text will display in yellow highlight, while deletions will display in a red with strikethrough (crossed out) text format.



Use the **Go Back** button at the bottom of the screen to return to the Factors screen.



View PD

At the bottom of the Factor Screen, the **View PD** button will generate a PDF Position Description document. Viewing and printing this PDF is a good way to proofread your *Draft* PD before submitting for review. For more information about downloading and printing PDF documents, refer to the Getting Started in PD Express module.

Submit and Validate your PD – *PD Creators*

Once the **Factors** screen is complete, a PD is ready to be validated for errors and to move on to Supervisor Approvals. In order to sign a PD, a PD Creator must be set up in FPPS as a Supervisor. This simply means the user is deemed a Supervisor within the Service.

The **Save and Continue** button at the bottom of the factors page initiates PD Express validation. Read validation messages and resolve outstanding issues before selecting **Save and Unlock**. If you have no **Save and Continue** button, you can **Save and Unlock** the PD, opening it up for Supervisor review and approval.

The *Draft* PD will not move to *Review* status until proper Supervisor approvals are added to the PD. As PD Express does not currently automatically send communications, PD Creators without approval rights **MUST communicate** to the **Supervisor**, and **Approving Official**, that the PD is ready to be signed. This can be done via email or phone correspondence and should be in line with the workflow status and timeline of the PD. Be sure to include the **PD number** and **FWS Position Title** in your correspondence.

ON TRACK…

Approving Official

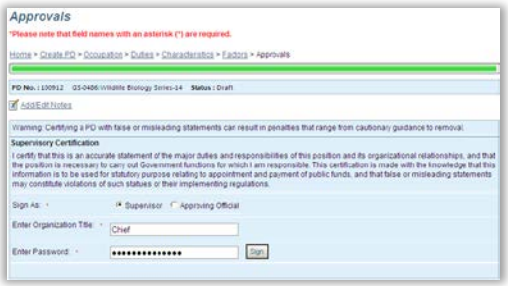
The second Supervisor signature must be from an Approving Official within the Service. It is likely this Official will be the head of your Organization.

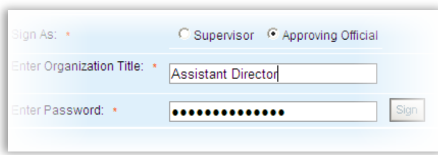
Ask your direct Supervisor for more information on the desired procedure within your supervision structure.

Supervisor Approval

In order for a PD to move from *Draft* status to *Review* status, a PD Express user with the role of Supervisor must approve it.

The Supervisor creating a PD can also sign the PD. In most cases, a PD created for an existing position within a Program Office needs one signature while a New PD and any PD Grade 14 or above will require two signatures to move on to *Review*.

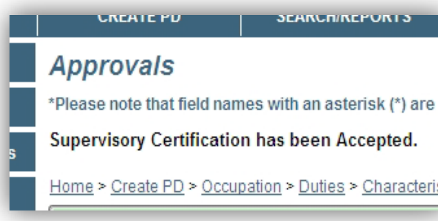




An **Approving Official** signature is required in the following cases:

- The PD is **New** to the Program Office
    - This includes Career Ladders PDs (addressed in a later module)
- The PD is for a high-grade position (grade 14 or higher)

Sign



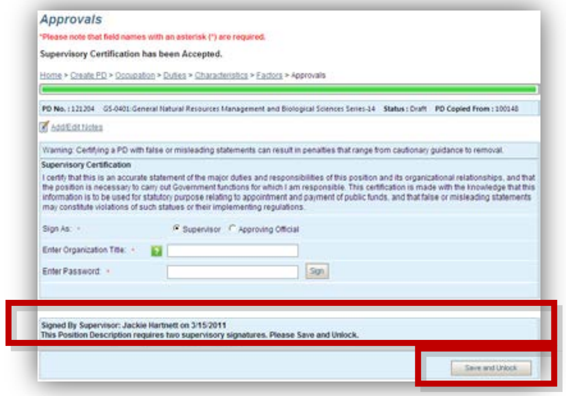
Choose **Supervisor** or **Approving Official**, and then type in your **Title** within your **Organization**.

Enter your **password** (the same password you used to log in to PD Express) and click **Sign** to add the signature to the PD and display a confirmation message.

Submit and Validate – For PD Express *Supervisors*

PD Express users with a Supervisor role are able to submit a PD to HR for review after signing a PD. **Submit for Review** on the **Approvals** screen initiates the same validation that happens on the **Factors** screen.

If a PD fails validation, the reason will appear at the top of the **Approval** screen. If an **Approving Official** signature is required and the PD has Supervisor approval, be sure to **Save and Unlock** the PD to allow the second Supervisor to **Edit** and **Sign**.



Tracking Progress

Using the "My Tracker" dashboard, a Supervisor will see all in-progress PDs within their assigned **Organization Code**(s). This allows a Supervisor to track the progress of *Draft*, *Review*, *Revise* and *Final Review* PDs of subordinates.

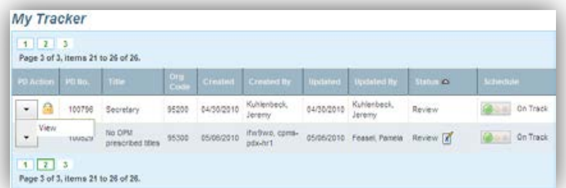
The dashboard **will not indicate** when a PD requires Supervisor Approval. The PD creator should **manually alert** the **Supervisor** or **Approving Official** when a PD needs **Approval**.

Preparing for Supervisor Approval

Below are a few best practice tips to help make Supervisor Approvals go smoothly:

- Make revisions/close notes (unless note needs Supervisor attention) before requesting **Approval**. Doing so helps to avoid confusion and saves time.
- Remember to "unlock" the PD by either clicking **Save and Unlock** or **Finish Edit** from the **PD Actions** menu of the "My Tracker" dashboard so the Supervisor can **edit** and sign the PD.
- "My Tracker" dashboard does *not* provide Supervisors with a "ready for approval" message. It is the PD Creator's responsibility to **verbally alert the Supervisor** of need for **Approval**. It is helpful to provide the **PD number**, and a brief statement of urgency level based workflow.
- If your PD is a grade 14 or 15, or if the PD is new (from scratch), an **Approving Official** signature is necessary. Be sure to send communications to *both* **Supervisor** and **Approving Official** regarding need for approval.

During Review Status



Once the Supervisor signs and clicks **Submit for Review**, you can view the status change on your "My Tracker" dashboard. Notice editing is now locked for all but HR roles until the PD is in R*evise* status.

Upon completion of the following activities, you will have demonstrated the ability to bring a new PD through the *Draft* status to *Revise*.

Activity 5 – Add Position Characteristics

1. Use the breadcrumb trail or left side menu to open the **Characteristics** screen
2. **Enter data** for all fields marked as required *(red *)*
3. **Verify** *Second Subdivision*, *IA Action* and *Reason for Submission*
4. Click **Save and Continue**

HANDS ON…

Goal:

Add Characteristics

Enter all required Position Characteristic fields to a PD.

Use **Reference D** from your Activity Log to complete this activity.

Activity 6 – Add/Edit Factors

5. Verify the "OPM GS General Schedule Supervisory Guide - GSSG" **Evaluation Guide** was selected
6. Select **Factor 1**, and click the **edit icon** to open the Factor pop-up screen
7. Click into the Factor Description field and **modify default language** by **deleting 1 sentence** and **adding text stating "updating factor language**"
8. Save your changes by clicking **Save and Close**
9. Repeat steps 6-8 for all remaining Factors (Factors 2-9)
10. Click **Show Difference** button at the bottom of the **Factors** screen
11. Click the **Go Back** button to return to the **Factors** screen
12. Click **Save and Continue**

HANDS ON…

Goal:

Add/Edit Evaluation Factors

Select Job Family FES Standard

Use **Reference D** from your Activity Log to complete this activity.

Modify Factor Language

Show Difference

Activity 7 – Submit for Review

13. On the **Approvals** screen, select **Supervisor**
14. Enter your **Organization Title** and **Password**, click **Sign**
15. Clear any outstanding validation messages if necessary
16. Click **Save and Unlock** and locate a partner (or Instructor) to provide your **Approving Official** signature
17. Switch Activity Reference Sheets with partner. Search for your partners **Reference D** PD Number, click to **edit** the PD, and **sign** as **Approving Official**
18. Click **Submit for Review**

HANDS ON…

Goal:

Submit for Review

Use **Reference D** from your Activity Log to complete this activity

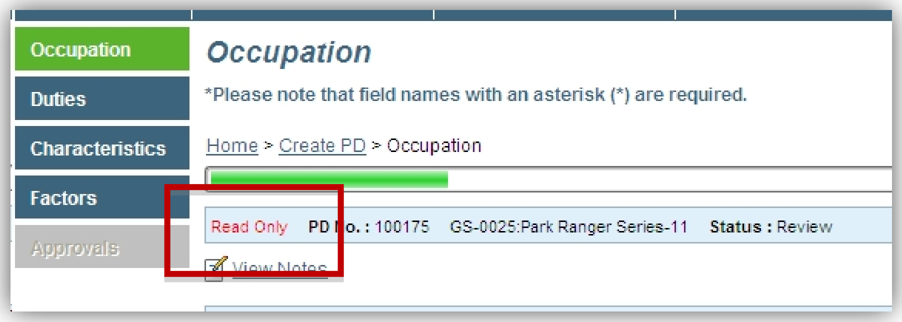
HR Review

Each designated HR team member is also keeping a sharp eye on their own "My Tracker" dashboard. When a PD is set to *Review* status, it is the signal for HR to move into action.

During Review, HR ***will***:

- Add required **Position Characteristics** (*HR Only Purposes Only* section)
- Ensure legal and OPM compliance
- Update PD and/or add **Notes** with recommended PD updates
  - To be addressed by the PD Creator
  - See **Revise to Publish** module for more about **Notes**
- Directly edit or provide recommendation notes on **Factor Language**
- Add **Classification Standards** used to classify the position
- Create an **Evaluation Statement**, if necessary
- Move a PD directly to *Published* status if no changes are required

During *Review* or *Final Review* status the PD Creator and/or Supervisor can view the PD in *Read Only* mode and *cannot* edit the PD.



U.S. Fish and Wildlife Service PD EXPRESS

PD Express: Introduction for Hiring Managers, HR and Admins

Module 4 – *Revise to Publish*

REVISE TO PUBLISH

About this Module

What you will See:

The content in this module explains the following PD Express features and functionality:

- *Revise* Status
- Notes functionality
- Reviewing and Accepting or Rejecting Factor Recommendations
- Supervisor and Approving Official Signatures
- *Final Review* Status
- *Published* Status

What you will Do:

1. View/ Add a Note
2. Edit a PD based on Notes entered during *Review* status
3. Edit and change Note status
4. Review Occupation and Duty recommendations and Accept or Reject changes
5. Review Factor recommendations and Accept or Reject changes
6. Initiate Supervisor approval

https://pdexpress.fws.doi.net/training

ON TRACK…

Revise Status Schedule

Keep your PD on Schedule according to the rules set in the PD Workflow.

On day 1, a PD begins *Revise* status *On Track*

On day 4, it will change to "Warning" indicating it is about to escalate

On day 5, the PD will change to *Escalate* status. This is the last chance to revise this PD and move to *Final Review*.

Be sure to check your dashboard daily. **Have your PD delegated** to someone if you will be unable to attend to it due to absence or other circumstances.

Click **Support Desk** to log a request to delegate a PD.

Revise Status

A PD begins the workflow in *Draft* status. The PD creator completes fields required and then submits to HR for review. During *Review* status, HR adds comments using the **Notes** tool. HR also modifies the PD (by adding or editing data) to bring the PD into compliance with Agency, Department, and Federal hiring standards.

If HR has no recommended changes to the PD, it can move directly to *Published* status from *Review*. If HR has recommended changes, they will **add notes** and/or make edits and set the PD to *Revise* status to alert the PD Creator that the PD is ready for revision.

For our example, the PD now appears in the "My Tracker" dashboard flagged as On Track in *Revise* status. This new status alerts the PD creator it is time to take action.

No.	Title	Org Code	Created	Created By	Updated	Updated By	Status	Schedule
1052	Contract Specialist	50181	01/24/2011	Hartnett, Jackie	03/10/2011	Hartnett, Jack	Revise	On Track To Warning:03/16/2011

The automated schedule is designed to encourage movement of a PD from *Revise* to *Final Review* and on to *Published* status.

Edit the PD

Now that the PD is in *Revise* status, **Edit** is once again a choice in the PD Actions menu on the "My Tracker" dashboard. This opens the PD in **Edit** mode.

The revision you make will depend on the types of updates recommended by the HR Reviewer. We know the PD shown below has notes to view because they notes icon is visible in the "My Tracker" dashboard

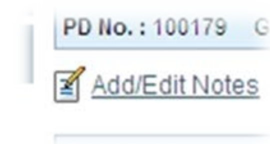
No.	Title	Org Code	Created	Created By	Updated	Updated By	Status	Schedule
1052	Contract Specialist	50181	01/24/2011	Hartnett, Jackie	03/10/2011	Hartnett, Jackie	Revis	On Track To Warning:03/16/2011

Each of the PD screens contains a link and icon for the **Notes** feature.

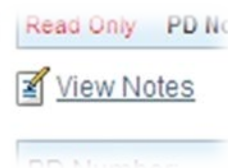
Notes are compiled from each screen and associated with an individual PD.

View Notes

When viewing a PD in Read Only mode, notes are available in read-only mode. This means that during *Review* and *Final Review* status, a PD creator *cannot add notes, but can read/review them*.

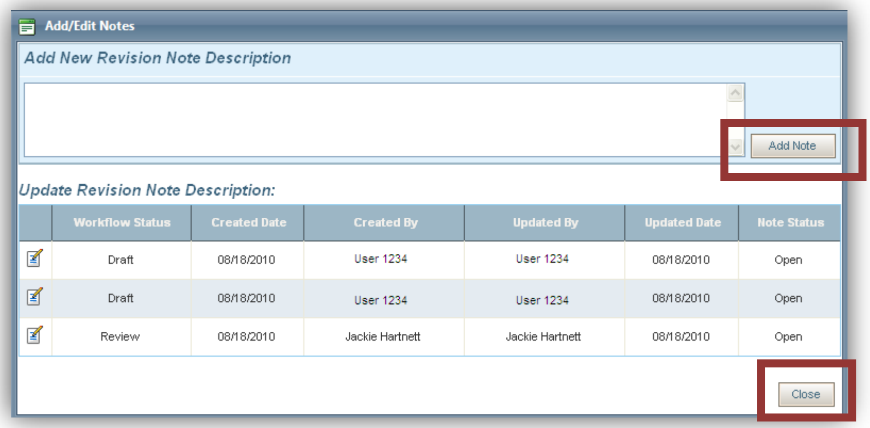


In *Revise* and *Final Review* status, neither PD creators nor HR can add any new notes; they can, however, **view** and **update** *existing notes*.



Notes can be viewed, added or edited from any Create PD screen during *Draft* or *Review* status (HR users can add/edit during *Review*, not Hiring Managers). You will need to access the PD in **Edit** mode to add a note.

To add or view notes, click the **Add/Edit Notes** link. **Type** or paste directly into the **Note Description** text field and click **Add Note.**



	Workflow Status	Created Date	Created By	Updated By	Updated Date	Note Status
	Draft	08/18/2010	User 1234	User 1234	08/18/2010	Open
	Draft	08/18/2010	User 1234	User 1234	08/18/2010	Open
	Review	08/18/2010	Jackie Hartnett	Jackie Hartnett	08/18/2010	Open

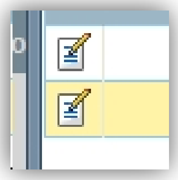
The new note will appear in the table at the bottom of the window, as shown in the image above. The **Note Status** appears in the row, as does the **workflow status** of the PD at the time the note was entered.

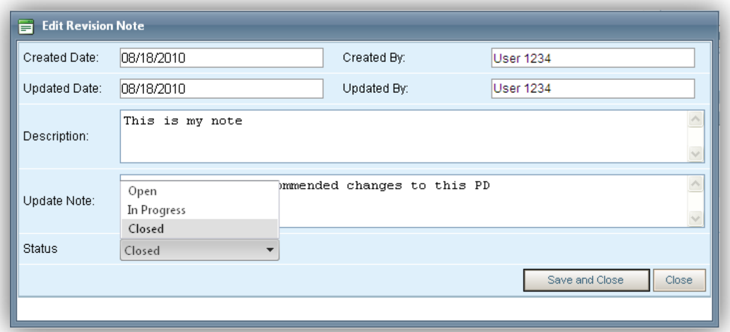
To close the **Add/Edit Notes** pop-up window, click **Close** at the bottom of the screen.

NOTE: During *Revise* and *Final Review* status, notes can be viewed and updated only. PD Express does not allow the creation of new notes during these statuses.

Editing Notes

To edit an existing note, click the **edit icon**  to the left of the note you wish to edit.





A pop-up window will open on top of the **Add/Edit Notes** window. The **Created Date, Created By, Updated Date, and Updated By** cannot be edited.

When editing a note, you have two choices:

Update a Note with Text

You can type text to describe changes and clarifications into the **Update Note** field. Some common uses for the **Notes** tool include:

- Add a note to yourself regarding a change to be made. This can be handy if the change will be time consuming and can be done at a later date.
- Add a comment to existing notes stating how the recommendation was addressed. It is good practice to also provide your rationale for not adopting a recommended change.

Change Note Status

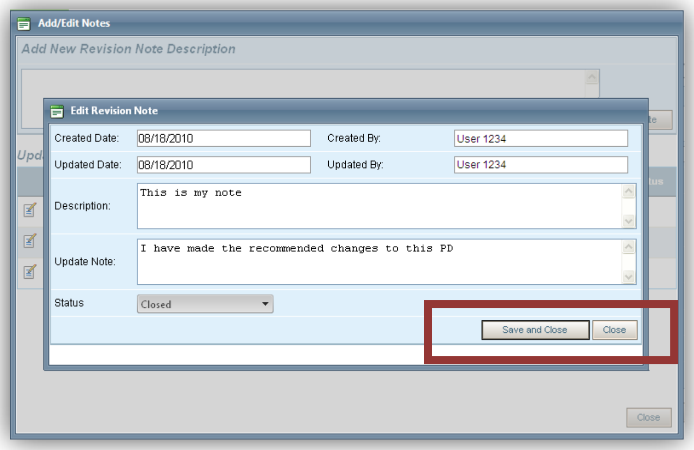
A note can be manually updated to one of three statuses:

- **Open** – This is the first status of the note. An *Open* status generally indicates the note has not been reviewed by the PD Creator.
- **In Progress** – An *In Progress* status indicates the note has been reviewed by the PD Creator and action will be taken
- **Closed** – A *Closed* status indicates the note has been addressed. It is good communication practice to enter a comment into the **Update Note** field before you close the note.

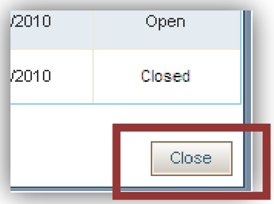
Change the **Status** of the note by clicking the arrow to display the drop-down menu.

Save and Close a Note

To complete the edit process and save your changes, be sure to click the **Save and Close** button.

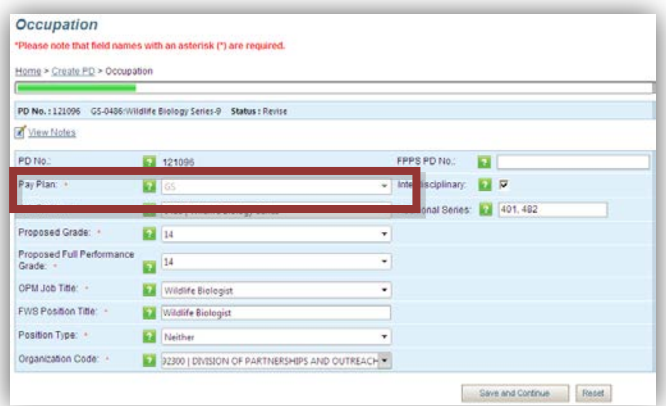


When finished viewing notes, click **Close** in the bottom right corner to close the **Add/Edit Notes** pop-up window.



Locked Fields in Revise Status

During revision, the **Pay Plan *field is*** "locked" and unavailable for edit. PD Express uses this field as a basis for pre-populated factors. If this type of change is necessary you should start a new PD in *Draft* status. All other PD Creator fields should be editable during *Revise* status.

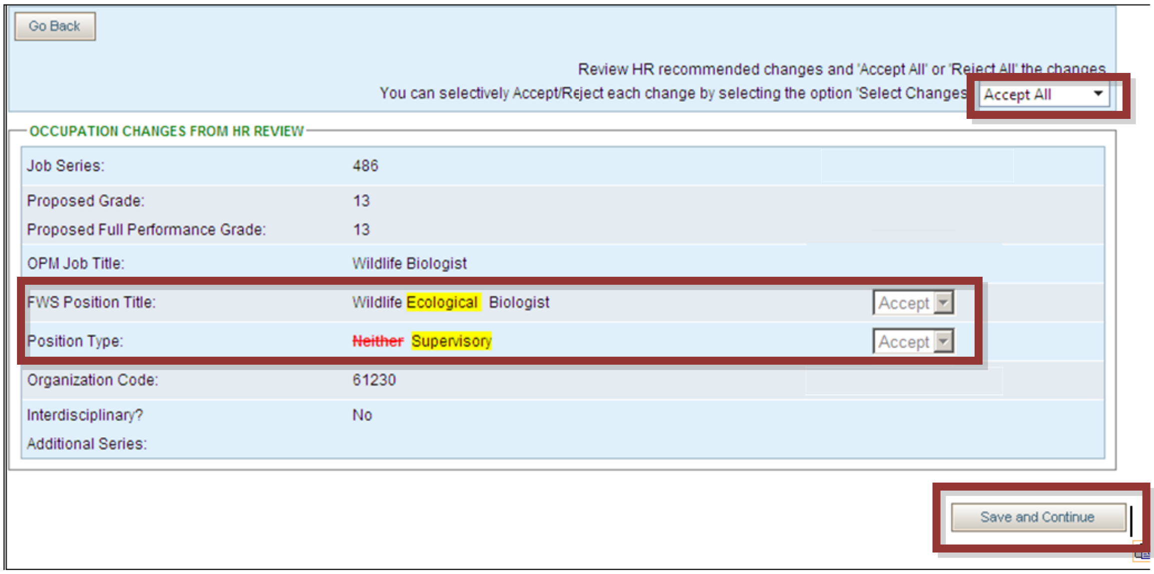


Occupation Recommendations

During *Review* status, HR will review the fields on each screen of the PD to ensure the information provided is correct for the position. When reviewing, HR has the opportunity to update the language directly and/or add notes to the PD Notes using the Notes tool (detailed earlier in this module). Once HR has completed their review, they will set the PD to *Revise* status to alert the PD Creator that the PD is ready for revision.

If HR has made any change to the Occupation screen, a pop-up screen displays an **Occupation** "Show Difference" report and PD creators have the opportunity to **Accept All**, **Reject All** changes or **Accept/Reject** individual changes.

Text crossed out in red font indicates information was removed during Review while text highlighted in yellow font indicates text was added to your original language.



Accepting / Rejecting Changes

The PD Creator must **Accept** or **Reject** the changes on each screen before moving on to the next screen.

- **Accept All Changes –** Select **Accept All** and **click Save and Continue**
- **Reject All Changes –** Select **Reject All** and **click Save and Continue**
- **Accept / Reject Individual Changes –** Select **Select Changes,** Accept or Reject each change, and click **Save and Continue**

Once the PD Creator has accepted or rejected the changes, they will be brought back to the updated / editable version of the screen they are reviewing.

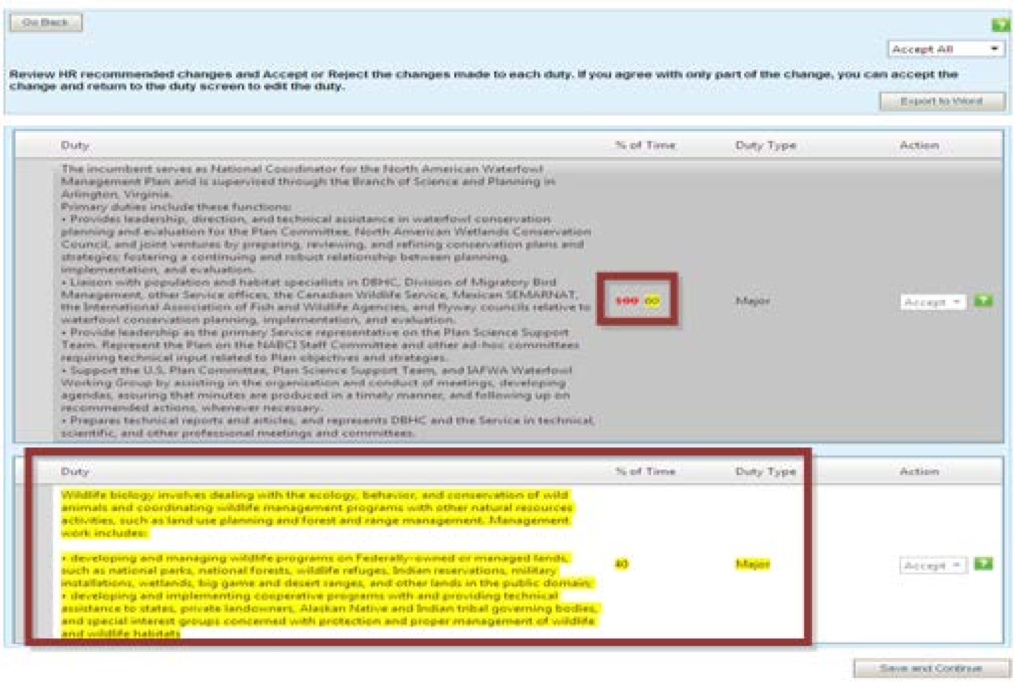
In the example above, HR has reviewed the PD and proposed revisions to the FWS Position Title and the Position Type on the Occupation screen. The PD creator will need to review and either Accept or Reject these changes before moving on to the Duty screen.

Duty Recommendations

During *Review* status, HR will look through the selected duties in the PD, ensuring they are applicable for the proposed PD.

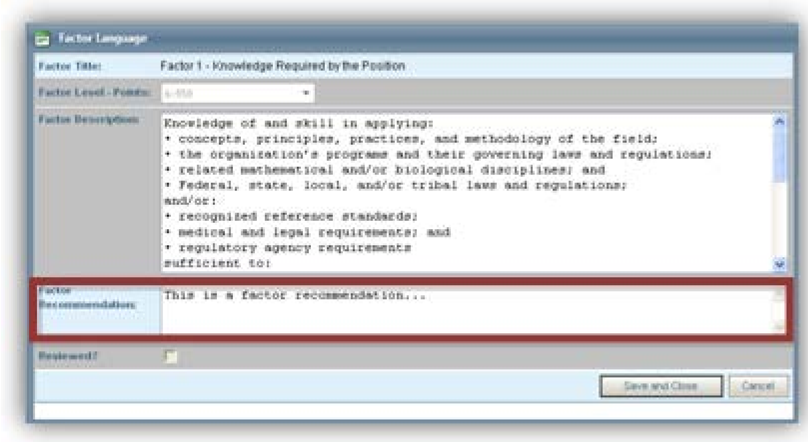
HR has the opportunity to make revisions to the duties, add or delete duties, change percentage of time allocation, change the duty type and add/edit/remove qualifications.

In the example below, HR has added a duty, and changed the allocation percentage for both proposed duties. In *Revise*, the PD creator will need to review and either Accept or Reject these changes using the same process mentioned above.

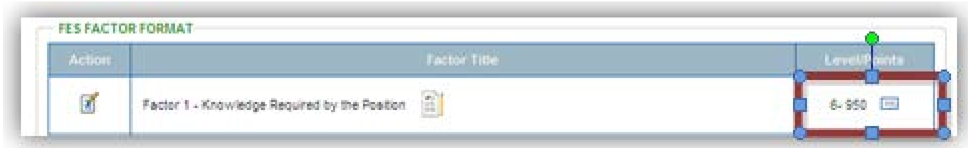


Factor Recommendations

During *Review* status, HR will look through the factor language of the PD ensuring it is both correct for the position and in compliance with OPM standards. When reviewing, HR has the opportunity to either update the language directly and/or provide **Factor Recommendations** in the pop-up window of individual factors.



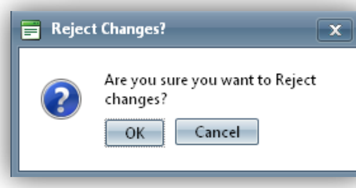
PD Express provides a comment icon to notify PD Creators **Factor Recommendations** were provided. All **Factor Recommendations** must be reviewed and addressed by the PD Creator during *Revise* status.

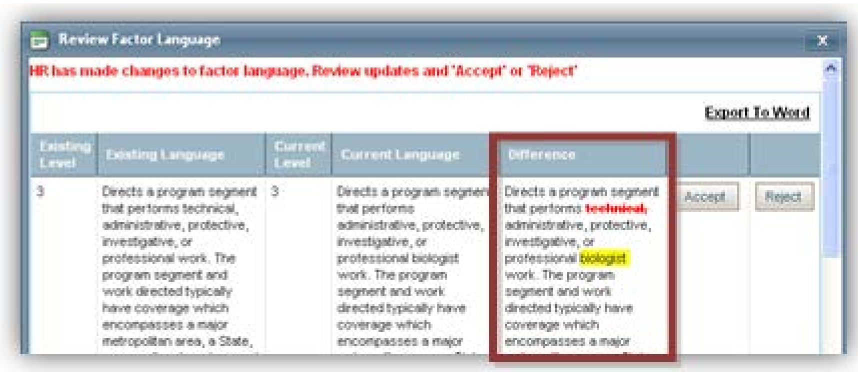


In addition to addressing the overall notes, PD creators should navigate to the Factors screen be sure to review each individual factor with a **Recommendation icon** . Users can address any changes made or suggested by HR by clicking the **edit icon** of the factor.

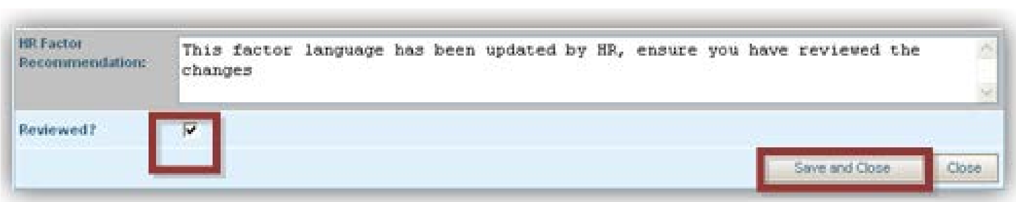
If HR has updated the language of this factor in any way, a pop-up screen displays a factor “show difference” report and PD Creators have the opportunity to **Accept** or **Reject** the changes made.

Text crossed out in red font indicates information was removed during Review while text highlighted in yellow font indicates text was added to your original language. Review the HR updates and select to either **Accept** or **Reject**. Once selected and confirmed, you will be brought back to the Factor pop-up screen where the **Reviewed?** checkbox is automatically selected and text is present based on your **Accept** or **Reject** action. At this point you can update the **Factor Language** with any additional text you wish to include and click **Save and Close** to save updates.



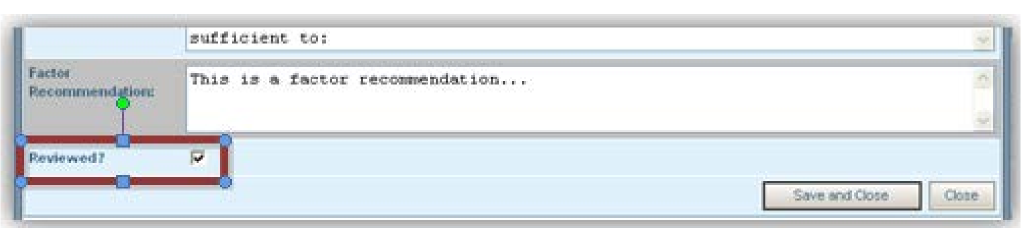


If factor language was directly updated during *Review*, the **Factor Recommendation** may indicate the language was updated by HR and request you "accept" or "reject" the changes, it is good to review the recommendation information before selecting **Save and Close** because HR may have provided rationale for their updates.



Sometimes HR may not edit the language directly, but will, instead, provide a text recommendation to update language. These types of **Factor Recommendations** will not have an "accept" or "reject" option and should be addressed by the PD Creator.

Once updates are complete, to indicate the factor has been reviewed, edits made and that you are comfortable with the language presented, simply mark the **Reviewed?** checkbox. Click **Save and Close** and move on to the next factor.



Once all **Factors** are reviewed and saved and all **notes** are addressed (aka marked to a “Closed” status), navigate to the **Approvals** page to **Sign** and S**ubmit for Final Review**.

Supervisor and Approving Official Signatures

Just as in the case of a PD moving from *Draft* to *Review* status, a PD going from *Revise* to *Final Review* status requires Supervisor Approval(s). Refer to the Supervisor Approval section of the **Create to Review** training module for details.

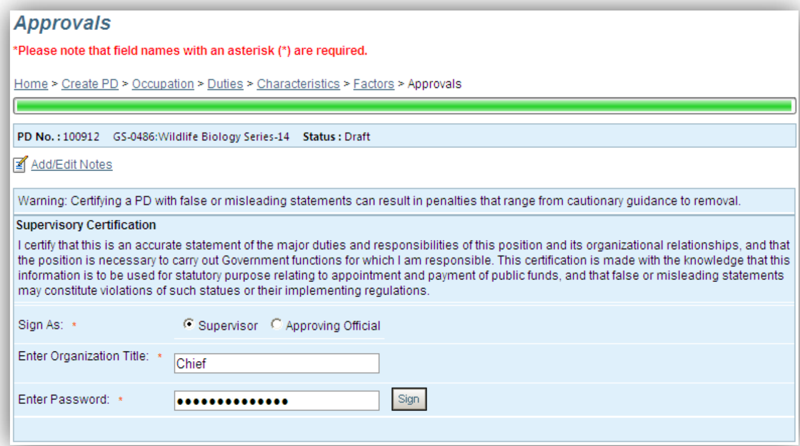
While it is best to have the same Supervisor(s) who signed the initial *Draft* PD approve changes made during *Revise*, it is not required. PD Express requires a Supervisor within the correct **Organization Code** sign the PD.

The same rules apply for *Revise* approvals as for *Draft* approvals. If the PD Creator is designated a Supervisor within the Service, that user can sign the PD.

An **Approving Official** signature is required in the following cases:

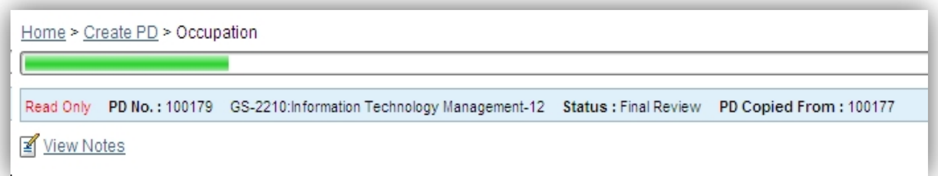
- The PD is New to the Program Office
- The PD requires high-grade review (grade 14 or higher)

The last Supervisor to sign the PD can **Submit for Final Review.**



Final Review Status

During *Final Review*, the HR Classifier will use the **View Notes** functionality as a primary source of review. The PD will be checked for accuracy of original content as well as additions and revisions.



PDs grade 14 and above will be reviewed by an HR team member with designated authority for high-grade review. This reviewer cannot edit the PD, but indicates approval by signing and publishing the PD.

During *Final Review*, the PD Developer and Supervisor may **View** the PD in read-only mode, but is no longer able to **Edit**.

Published Status

Once the PD passes *Final Review*, HR certifies the PD and sets it to *Published* status.

A Published PD:

- Immediately becomes available in Read-Only mode to all PD Express users through the **Search/Reports** tool
- No longer appears in the "My Tracker" dashboard

Inactive Status

Inactive PDs will not appear in the "My Tracker" dashboard, are not searchable, and cannot be used as the basis for a new PD.

If you are creating a new PD to replace a PD that is no longer needed, has become invalid or obsolete, be sure to notify your **Regional Administrator** via the **Support Desk** link. Through this link, you can log a request to the Administrator to inactivate the obsolete PD. Be sure to include the PD number(s) for reference.

HELP

Q: "If I find an error in my PD after it is *Published*, or want to change a *Published* PD in any way, what should I do?"

A: The most direct solution is to use the existing PD to create a New PD, and then modify with desired changes. The New PD must then go through the classification process again.

Q: "Okay, so…once I create that new PD with my changes, I am done…right?"

A: Almost – next, decide if the original PD should be set to *Inactive* status.

ON TRACK…

PD Express Housekeeping

The PD Express library is a valuable tool… but only if it is kept clean. Each user is responsible for assuring that every PD in *Published* status is useful and relevant.

Upon completion of the following activities you will have demonstrated ability to view and edit a note as well as move a PD to Final Review status. If time permits, feel free to start the extra credit and learn how to add/create a note.

HANDS ON…

Goal:

View a Note

View a note in Read-Only mode

Use **Reference C** from your Activity Log to complete this activity.

Activity 1 – View a Note

1. Access your **Reference C PD** in **Edit** mode by searching or through “My Tracker” dashboard
2. Click the **View Notes** link beneath the progress bar
3. Locate the 1st note in the list of notes
4. Click the small **edit icon** on left to open the note details
5. **Read** the note and click **Close** to close window

HANDS ON…

Goal:

View and Edit a Note

Revise your PD and Update Notes

Review Factor Recommendations

Set PD to *Final Review*

Use **Reference C** from your Activity Log to complete this activity.

Activity 2 – Revise, Review Factors and Set to Final Review

6. Access your **Reference C PD** in Edit mode by searching or through “My Tracker” dashboard
7. Click **View Notes** link beneath the progress bar and locate the 1st note
8. Click the **edit icon** on left to open the note details
9. **Read** the note and set status to *In Progress*, click **Save and Close**
10. **Edit** the PD in accordance to the note. Remember to save your edit.
11. **Edit** the note again, add a comment, and change status to *Closed*
12. Click **Save and Close**
13. Repeat steps 8-12 for any additional notes
14. On Factors screen, click the **edit icon** for Factor 1 to review **Factor Recommendations**
15. Click **Accept**
16. Verify the **Reviewed?** checkbox is marked and click **Save and Close**
17. Repeat steps 14-16 for all **Factor Recommendations**, click **Save and Continue**

    *<<If you are a Supervisor, move to step 13; if not, notify Instructor the PD needs to be signed and click **Save and Unlock**>>*

18. On Approvals screen, sign as Supervisor and click **Submit for Final Review**
19. Navigate to “My Tracker” and verify the PD is now in *Final Review* status

EXTRA CREDIT – Add a Note

1. Create a PD from an existing **GS-486-13 PD**
2. Record this new PD Number as Reference E on your Activitiy Reference Sheet
3. On Occupation Page, click **Add/Edit Notes**
4. Type to add a note asking if the **Job Series** should be 486 or 401
5. Click **Save and Close**
6. Verify your note now appears at the bottom of the notes pop-up window with *Draft* status and you as the creator
7. Feel free to finish this PD and **Submit for Review**, however this will no longer be used in training – it will become *Inactive* after 11 days in *Draft* status

HANDS ON…

EXTRA CREDIT:
Add a Note

Add a Note to a *Draft* PD

Record this PD as **Reference E** on your Activity Reference Sheet.

U.S. Fish and Wildlife Service

PD EXPRESS

PD Express: Introduction for Hiring Managers, HR and Admins

Module 5: *Statement of Difference (SOD) And Career Ladder Position Descriptions (CLPD)*

STATEMENT OF DIFFERENCE AND CAREER LADDER

About this Module

What you will See:

The content in this module explains the following PD Express features and functionality:

- Statement of Difference (SOD) Position Description
- Career Ladder Position Description (CLPD)
- PD Express Summary

What you will Do:

1. Create a Statement of Difference PD
2. Download and view the PDF Statement of Difference PD
3. Create a Career Ladder PD
4. Search for your Career Ladder PD
5. Copy an existing Career Ladder bundle
6. Download and view PDF Career Ladder PD

https://pdexpress.fws.doi.net/training

ON TRACK…

You might go down the path of creating a full PD then learn instead that an SOD PD will be more acceptable from an HR perspective.

No Problem!

Begin your SOD PD and click **Support Desk** to contact your Regional Administrator to set the PD to *Inactive* status.

Statement of Difference (SOD)

SOD PDs are a PD type created when you need to create a position at one grade below an existing position. For example, if a full performance position is at a grade 11, and you know you can bring in a resource at grade 9 (two-interval position) with additional supervision or modified duties, you can create an SOD PD! A couple of big advantages of SODs are: they allow for an increase to the applicant pool and are quick to create in PD Express. When you create an SOD, all **Duties**, **Characteristics** and **Factor** information from the **Associated Full PD** is pre-populated and cannot be edited. In fact, the only screens that require editing are the **SOD** and **Occupation** screen and the HR section of the **Characteristics**.

SOD PDs are the easiest type of PDs to create. In just a couple steps your new PD is ready to move on to *Review* status!

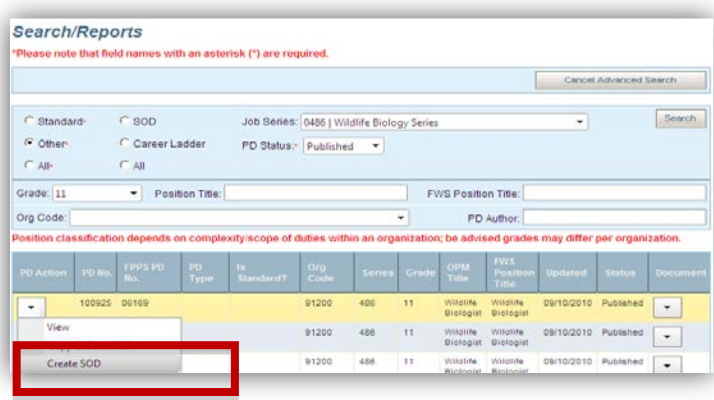
Create SOD

From the **Create PD** menu, choose the option to **Create a Statement of Difference**.

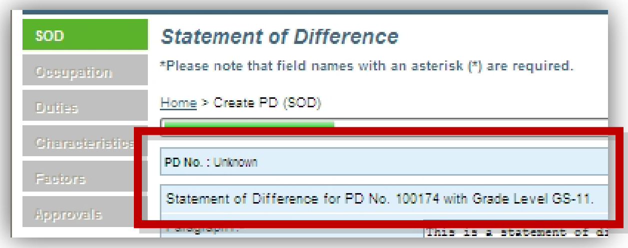
Search for the Full Performance PD

The next step is to search for the **Full Performance PD** that will be used to build the SOD.

The **Search** report will contain the **Action** to **Create SOD**. It is important to note you currently cannot create an SOD from a Standard PD in PD Express, nor can any PDs be created from an SOD PD.



SOD Screen Options



On the SOD screen, note that a PD Number (**PD No.**) has not yet been assigned, but the PD number of the **Associated Full Performance PD** *is* included, along with the **Full Performance Grade**.

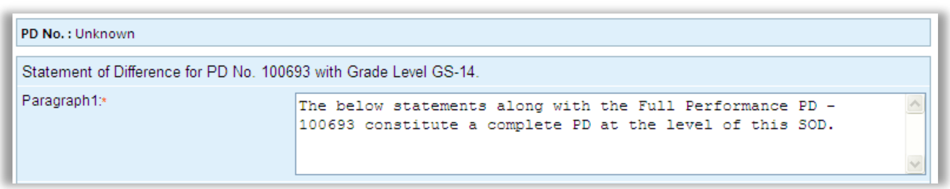
The SOD PD is not saved and assigned a **PD No.** until the **Create SOD** button is clicked.

Also note that the left side menu is gray, indicating that the menu options are not yet available. An extra **SOD** screen is placed first, before the **Occupation** screen.

The SOD screen includes the statements of how the position is different from the **Associated Full PD**. These differences are summed up in three paragraphs.

Paragraph 1

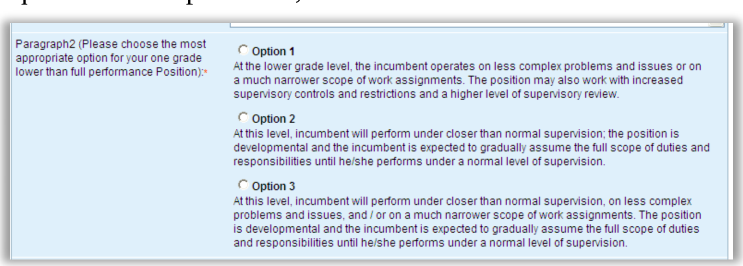
The text in **Paragraph 1** should include a statement regarding the relationship of the SOD PD to the **Associated Full Performance PD**. PD Express will pre-populate the field to get your statement started. Click into **Paragraph 1** (beneath the **PD No.** field) and provide additional information on the position.



Example Statement: "This statement along with the Full Performance PD#100693constitutes a complete PD at the level of this SOD."

Paragraph 2

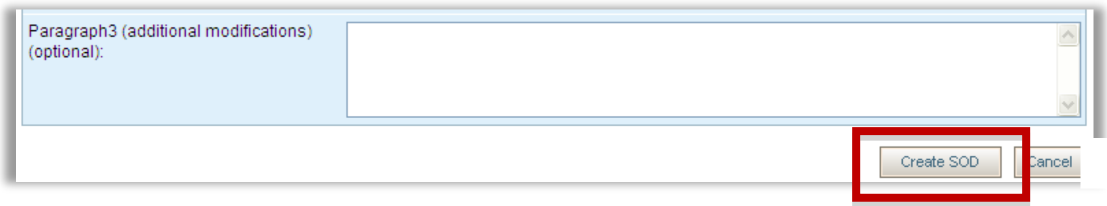
In this paragraph, three **Options** are listed to indicate the reason for the Statement of Difference. These options outline if the lower level position has less complex tasks, requires more supervision, or both.



PD Creators should choose the best option for their specific position and move on to fill in **Paragraph 3**.

Paragraph 3

Paragraph 3 on the SOD screen is optional. Click into the field to add additional information regarding the position, and click **Create SOD** to generate the PD.

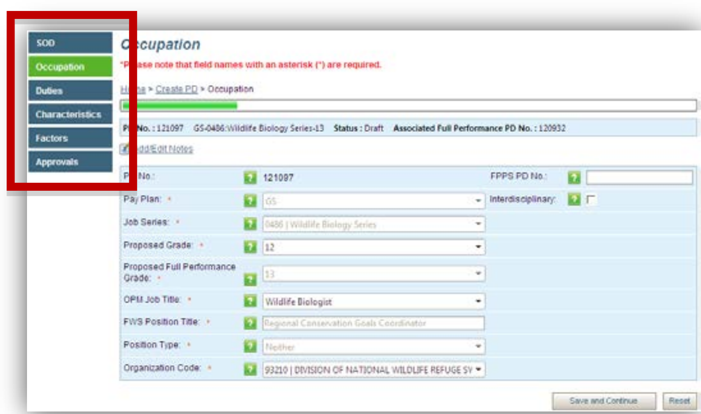


Editing the SOD PD

Once saved, each PD screen will become available from the left side menu.

The PD creator can **view** data on the **Occupation**, **Duties**, **Characteristics** and **Factors** screens. Most data fields on these screens are all not editable to the PD Creator; however, the **Proposed Grade, Title and Organization Code** can be edited on the Occupation screen.

A PD creator with Supervisor rights will also have access to the **Approval** screen.



Information available for edit in an SOD includes:

- **Proposed Grade, Titles and Org Code** (Occupation Screen)
- **FPPS No.** (Occupation Screen)
- **Supervisory Certification** (Approvals Screen)

The **Duties, Characteristics** and **Factors** screens are not available for edit. Use the left side menu buttons to navigate to the **Approvals** screen on an SOD.

Edit Proposed Grade

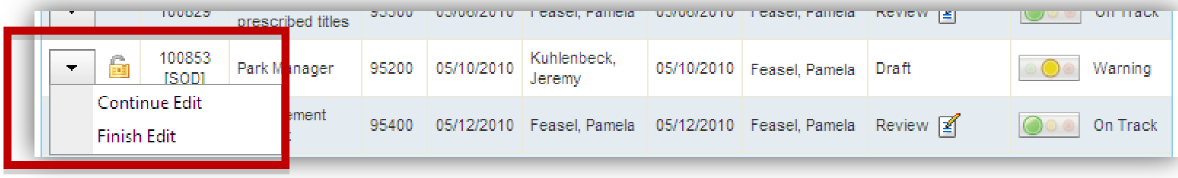
To edit the **Proposed Grade,** choose the proper grade based on the interval of the chosen **Job Series**.

From this point on, the SOD PD moves through the workflow just as any other PD, requiring **Supervisor Approval** and HR Review/Certification.

Locating an SOD PD

My Tracker Dashboard

Similar to a new PD, an SOD in *Draft*, *Review*, *Revise* or *Final Review* status will appear on the "My Tracker" dashboard. Beneath the PD number, the text "**[SOD]**" indicates the PD is a Statement of Difference PD. If you have the PD locked and open for editing, choose **Continue Edit** from the PD Actions menu to open the PD in edit mode.

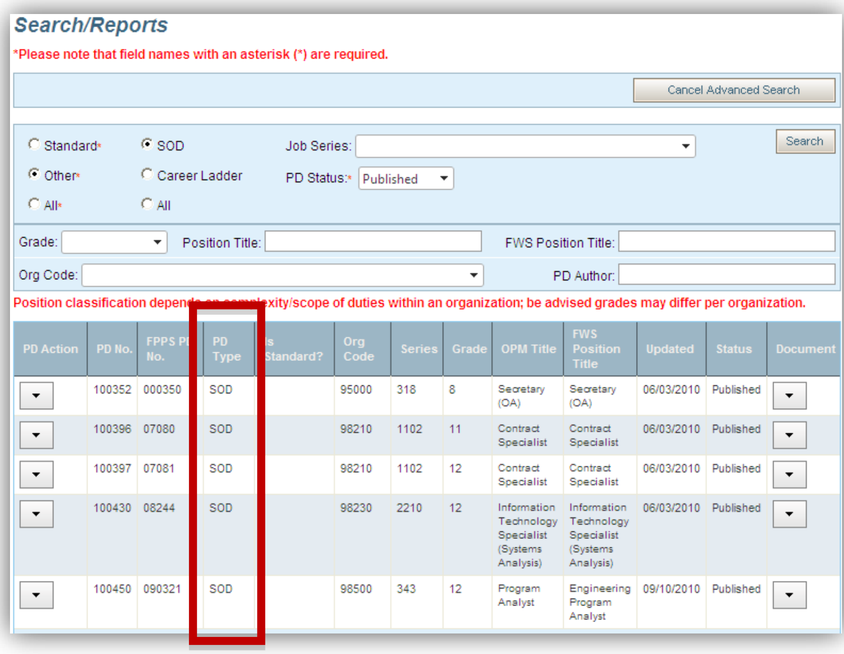


Search/Reports

An SOD PD can also be located using the Search tool. If the SOD PD is in *Published* status it is viewable by all PD Express users. Otherwise, viewing and editing the SOD PD depends on role permissions and **organization code**.

When searching for an SOD, choose **Other** and **SOD** as the **PD Type**. The search results will display columns for **PD Type**, **Org Code**, **Series** and **Grade**.

The PD Type will be listed as **SOD**.



HANDS ON…

Goal:
Create an SOD PD

Use the following Scenario as the reason for creating your Statement of Difference:

You are creating a position with a Full Performance grade of 13. The candidate will initially be hired into the position as a grade 11 requiring more supervision.

When finished, record the PD Number of your SOD PD as **Reference F** in your Activity Reference Sheet.

Activity 1 – Create a Statement of Difference

In this activity you will demonstrate the ability to successfully create a **Statement of Difference** PD.

Steps

1. Locate **a GS-486-13** *Published* PD using the **Search/Reports** screen
2. From the **Action** menu, choose **Create SOD**
3. Edit **Paragraph 1** text to include reference to **Pay Plan, Job Series** and **Grade**
4. In **Paragraph 2**, choose the **Option** indicating "more supervision"
5. Fill in any additional information into **Paragraph 3** (any info, make it up)
6. Click **Create SOD**
7. Record this new SOD PD Number as **Reference F** on your Activity Sheet
8. Click **Occupation** in the left side menu to view the Occupation Screen
9. Edit the **Proposed Grade** to read grade **12**
10. Click **Duties** on the left side menu to view the Duties screen
11. Click **Characteristics** on the left side menu to view the Characteristics screen
12. Click **Factors** in the left side menu to view the Factors Screen
13. Click the **edit icon** in the Action column to view Factor Language is present
14. Click **View PD** to view a PDF version of your SOD PD
15. Click **Approvals** in the left side menu (if you are not a Supervisor contact your Instructor to sign your SOD PD)
16. **Sign the PD** and **Submit for Review**, clear validation messages as necessary

That's it! PD Express is designed to make creating an SOD quick and simple.

Career Ladder Position Description (CLPD)

Career ladder positions are also known as developmental positions. For these, we create a series of positions at lower grades, providing training and experience that will allow the employee to be promoted to the full performance level without competition. Career Ladders typically include three or more grades and can be created as a "package" in PD Express.

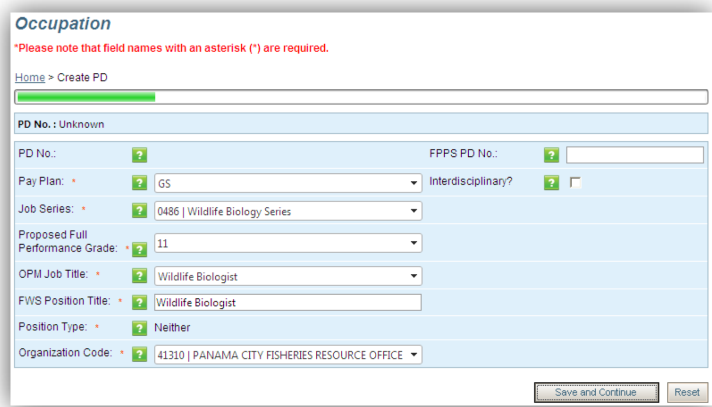
A Packaged Progression

The creation of a Career Ladder allows a PD Creator to package multiple PDs at once. CLPDs can be created for several reasons, most common of which is positions do not need to be competed from a hiring perspective. Let's imagine you need to fill a position at **Full Performance Grade** 11 and you know your current needs and training availability create an environment conducive to hiring a candidate at a lower grade. You can create a position starting at a grade 7, growing to a 9, and eventually reaching the **Full Performance Grade**, 11. In this situation, PD Express allows you to create three PDs at one time and move them through the workflow together.

Start a New Career Ladder

To begin a new Career Ladder PD choose **Create PD**, select **Create Career Ladder Position Description**, and click **Continue**.

The first PD created in your Career Ladder should be the **Full Performance PD**, the highest grade level. To make creation as simple as possible, PD Express will copy information from the Full Performance PD to the lower grade PDs in the ladder.

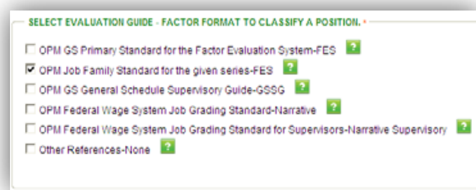


Proposed Full Performance Grade is available on the **Occupation** screen. Be sure to select the grade that is *highest*, on the Career Ladder.

Next, you can modify the **Duties**, **Characteristics** and **Factors** screens just as with any other new PD. All selections made on these screens will be copied over to the lower ladder PDs. The difference, however, with a Career Ladder PD becomes apparent on the **Factors** screen.

Factor Format

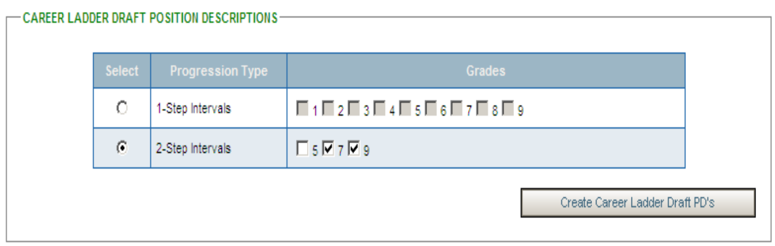
Initially, the Factors screen looks the same as other PDs. An **Evaluation Guide Factor Format** will be auto-selected based on the **Job Series, Grade** and **Position Type** of the Full Performance PD and the selected format will carry over to the lower grade PDs. As a note, CLPDs are defaulted to "Neither" **Position Type.**



View the **Factor Language** for each factor, modifying as necessary and clicking **Save and Close** to complete adding language.

Create the Ladder PD(s)

On the Factors screen, you will be presented with the option of creating *Draft* PDs for lower grades. Select **Progression Type** and lower **Grades** to be included.



Click **Create Career Ladder Draft PDs** to generate the *Draft* status PDs with data from the Full Performance PD. Confirmation of Ladder PD creation is shown. The system will create the full performance ladder as a full PD and will alternate between SODs and Full PDs with the remaining PDs in the ladder.

View and Edit a Lower Grade PD

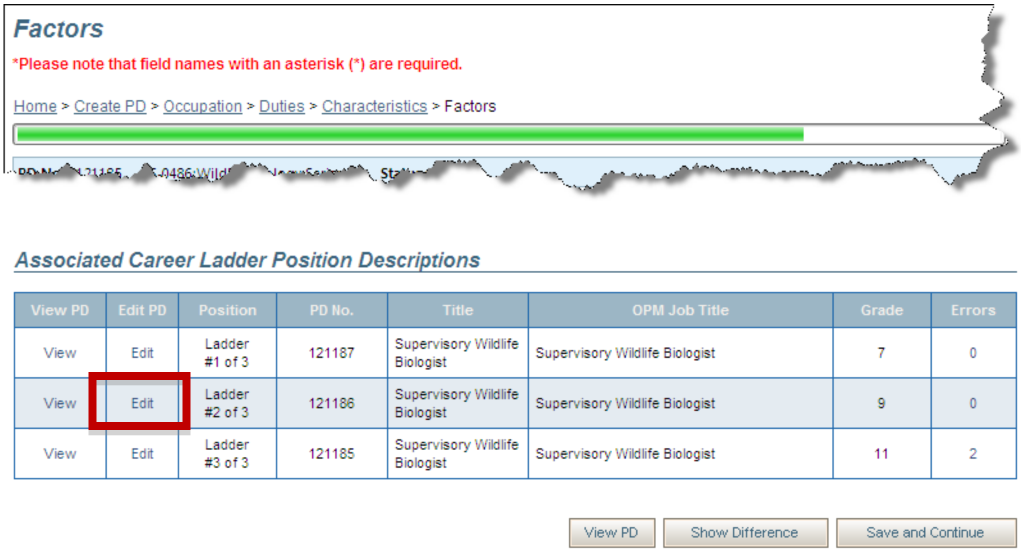
The user now has the ability to begin to work on the lower ladder PDs of the CLPD since the full performance PD has been drafted. Users can access lower ladder PDs from the Factor (final) screen of each PD in the ladder via the **Edit** link in the **Associated Career Ladder Position Description** table, depicted below.

In this example we are creating a CLPD for a GS-486-7, 9, 11. The GS-11 is our Full Performance PD, the 9 will be an SOD, and the 7 will be a full PD. PD Express will leverage much of the data from the full performance PD, but the user will still be required to review and update the lower ladder PDs.

HELP

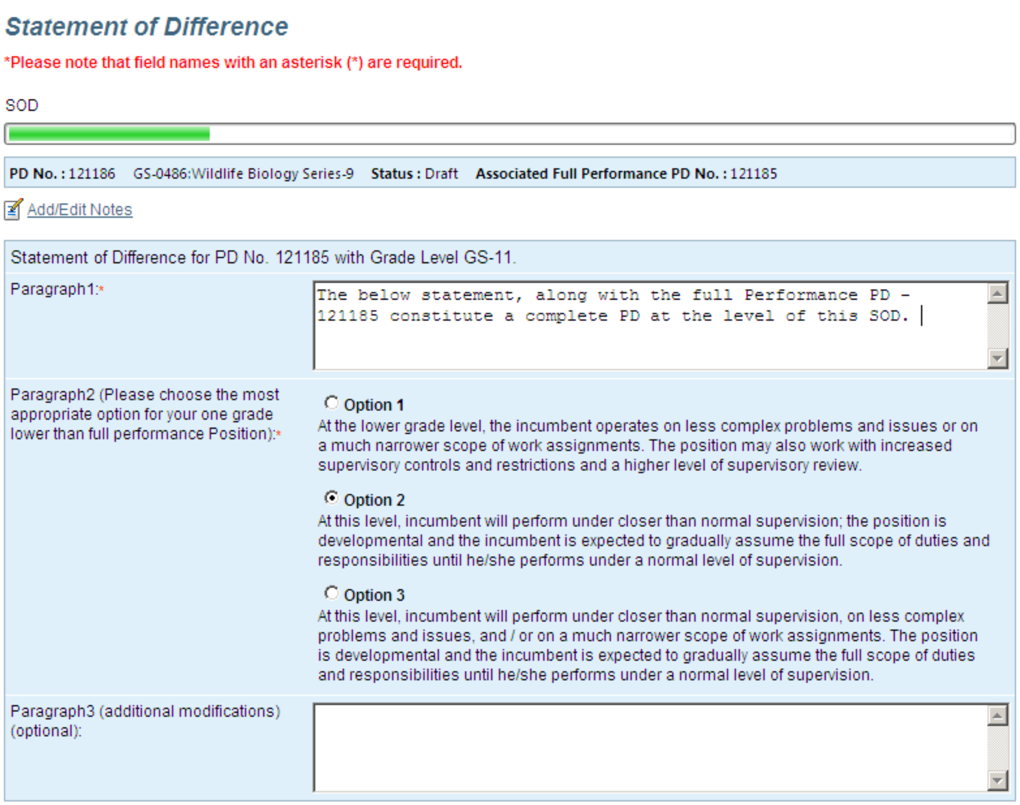
Factor Evaluation Format

Once the Ladder PDs have been drafted, the **Factor Evaluation Format chosen** cannot be modified on the Full Performance PD, or the Ladder PDs. The Factor Language, however, remains editable.



View PD	Edit PD	Position	PD No.	Title	OPM Job Title	Grade	Errors
View	Edit	Ladder #1 of 3	121187	Supervisory Wildlife Biologist	Supervisory Wildlife Biologist	7	0
View	Edit	Ladder #2 of 3	121186	Supervisory Wildlife Biologist	Supervisory Wildlife Biologist	9	0
View	Edit	Ladder #3 of 3	121185	Supervisory Wildlife Biologist	Supervisory Wildlife Biologist	11	2

By selecting the **Edit** link of the GS-9 PD, above, (Ladder #2 of 3), the user will be directed to the **Statement of Difference** screen to review and update the second ladder.


Statement of Difference

*Please note that field names with an asterisk (*) are required.

SOD

PD No. : 121186 GS-0486:Wildlife Biology Series-9 **Status :** Draft **Associated Full Performance PD No. :** 121185

Add/Edit Notes

Statement of Difference for PD No. 121185 with Grade Level GS-11.

Paragraph1:*

The below statement, along with the full Performance PD - 121185 constitute a complete PD at the level of this SOD.

Paragraph2 (Please choose the most appropriate option for your one grade lower than full performance Position):*

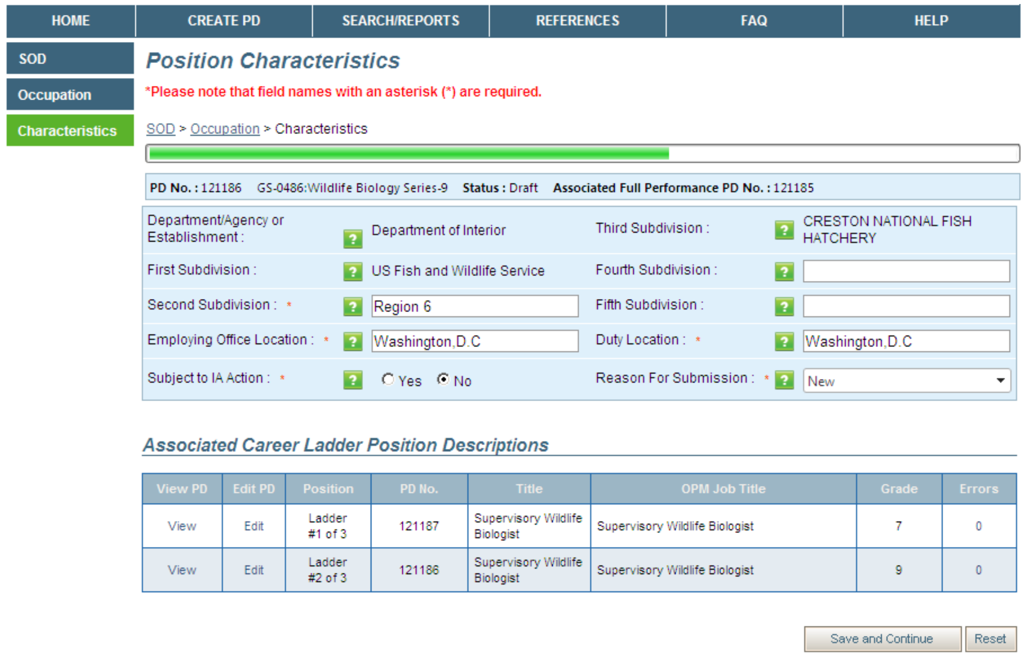
Option 1
At the lower grade level, the incumbent operates on less complex problems and issues or on a much narrower scope of work assignments. The position may also work with increased supervisory controls and restrictions and a higher level of supervisory review.

Option 2
At this level, incumbent will perform under closer than normal supervision; the position is developmental and the incumbent is expected to gradually assume the full scope of duties and responsibilities until he/she performs under a normal level of supervision.

Option 3
At this level, incumbent will perform under closer than normal supervision, on less complex problems and issues, and / or on a much narrower scope of work assignments. The position is developmental and the incumbent is expected to gradually assume the full scope of duties and responsibilities until he/she performs under a normal level of supervision.

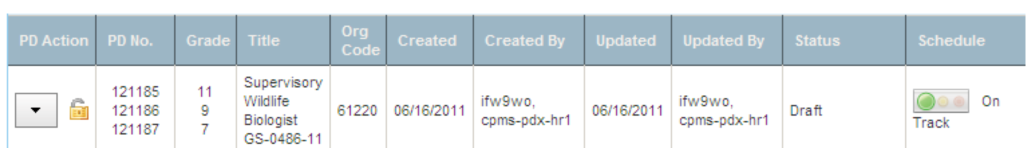
Paragraph3 (additional modifications) (optional):

The CLPD functionality has been constructed in PD Express to mirror the CLPD process in place at the Service. Thus, the system allows for the creation of a full PD, then an SOD, then a full PD, etc. Because the GS-11 in our example is a full PD, the GS-9 portion of the Ladder must be an SOD. In this example the user would need to populate paragraphs 1 and 2 (required) and paragraph 3 (optional) and then hit the '**Save and Continue**' button. The user will be directed to the **Occupation** screen within the SOD. In the **Occupation** screen there are only a few fields that are editable, including Position Title and Org Code. Once the user has made the appropriate updates on the Occupation screen, they will continue to the **Characteristics** screen, as shown below.



Once the user has completed their updates on the **Characteristics** screen they will select the '**Save and Continue**' which will allow PD Express to determine if there are any open actions related to this SOD. If there are actions, the system will display them, thereby allowing the user to address those to move the Ladder along in the process. If there are no remaining actions, PD Express will inform the user to continue to the next PD in the ladder requiring updates. The user can access the next PD in the Ladder by clicking the **Edit** button in the table above associated to the PD they want to edit.

A quick look at your "**My Tracker**" dashboard will show the newly created Ladder PDs.



So far we have been able to work on two of the three PDs in this Ladder. From this screen we would mouse over the drop down arrow in the **PD Action** column and select the **Edit** function to allow us to go back in to the Ladder and work on the GS-7 portion of the Ladder. This will be a full PD.

Associated Career Ladder Position Descriptions

View PD	Edit PD	Position	PD No.	Title	OPM Job Title	Grade	Errors
View	Edit	Ladder #1 of 3	121187	Supervisory Wildlife Biologist	Supervisory Wildlife Biologist	7	0
View	Edit	Ladder #2 of 3	121186	Supervisory Wildlife Biologist	Supervisory Wildlife Biologist	9	0
View	Edit	Ladder #3 of 3	121185	Supervisory Wildlife Biologist	Supervisory Wildlife Biologist	11	2

From the Factor screen of the Full PD, we will click on the **Edit** link in the **Associated Career Ladder Position Description table** for the GS-7 PD, **Ladder #1 of 3**. Upon clicking that link the user will be directed to the **Occupation** screen of the GS-7 PD and will need to complete all of the necessary screens (**Duties, Characteristics** and **Factors**).

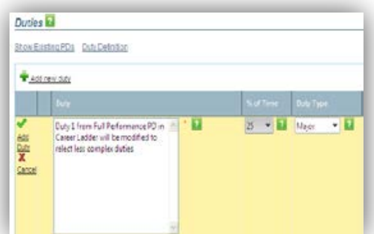
Duties and Qualifications

Duties and Qualifications are pre-populated from the **Associated Full Performance PD**. Each **Duty** should be reviewed on the lower-grade Ladder PDs, and may be modified to match the lower-grade responsibilities and tasks of the position.

Duties can also be added to the lower-grade PD, for example, to reflect a reduction of a more complex duty and addition of different duty to total 100% of time.

Lower-Grade PD Qualifications

The lower-grade PD may not require the same qualifications as the Full Performance PD. For example, while at a lower grade of 7, the employee may be working toward certification needed for grade 11. **Overall Qualifications**, as well as **Duty Qualifications**, may be modified on the lower-grade Ladder PDs. (Refer to the [Create to Review](#) module for more information on how to edit **Duties** and **Qualifications**)



Factors

The **Factor Evaluation Format** selected on the **Associate Full Performance PD** is selected on lower-grade PDs. Be sure to address each factor in the selected standard.

The **Factor Evaluation Format** *should not* be modified for lower-grade PDs.

Each suggested Factor should be reviewed, modified if necessary, and saved. Saved factor language is shown with the **icon** to the right of the Factor Title.

NOTE: Verify and Save factor language by accessing each factor below. FES factor levels and corresponding criteria are pre-populated based on typical factor level pattern for the Job Series and Grade selected.

FES FACTOR FORMAT

Action	Factor Title	Level/Points
	Factor 1 - Knowledge Required by the Position	8- 1550
	Factor 2 - Supervisory Controls	5- 650
	Factor 3 - Guidelines	5- 650
	Factor 4 - Complexity	5- 325

Data Validation

Getting back to our example of creating the GS-7 PD in the Ladder, the user can review the outstanding actions for this PD or any PD in the ladder by clicking on the **Action** button for that PD in the Associated CLPD table (below).

If, for example, the GS-7 PD is missing position factor language, PD Express will show a message like the one below. This must be addressed by the user to allow the Ladder to go forward. Upon making the necessary changes to the position factor language, the Action count will decrease from 1 to 0. The user then selects '**Save and Continue**' at the bottom of the **Factors** screen and, if there are no outstanding actions in any PDs in the ladder, PD Express will provide a link to the Approval screen where the user can sign and submit the ladder to HR.

Number	Error Message
1	Missing Position Factor Language

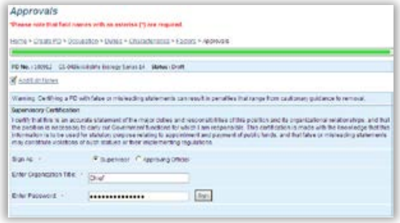
Associated Career Ladder Position Descriptions

View PD	Edit PD	Position	PD No.	Title	OPM Job Title	Grade	Errors
View	Edit	Ladder #1 of 3	121279	Human Resources Specialist (Performance Management)	Human Resources Specialist (Performance Management)	7	1
View	Edit	Ladder #2 of 3	121278	Human Resources Specialist (Performance Management)	Human Resources Specialist (Performance Management)	9	2
View	Edit	Ladder #3 of 3	121277	Human Resources Specialist (Performance Management)	Human Resources Specialist (Performance Management)	11	3

Save and Continue

Approval of Career Ladder

Often, Career Ladder PDs are new to a Program Office and require two **Supervisor** signatures. The **Approvals** menu is *not* available on the lower-grade PDs. Supervisor and Approving Official signatures are only available on the **Associated Full Performance PD** which will apply to all PDs. It is important for a Supervisor to review all PDs in the Career Ladder before signing. (See **Approval** sections in the **Getting Started with PD Express**, **Create to Review** and **Revise to Publish** modules to learn more)



A user with the role of Supervisor can **Sign** the PD. PD Express will validate all PDs in the Career Ladder. References to the **PD number** and **Title** of the lower-grade PDs are shown in the validation message, along with the number of errors in each PD. Each PD must be complete before the entire Career Ladder can move forward.

Moving through the Workflow

When all the PDs in the Career Ladder have been successfully completed, the **Supervisor Certification** is accepted. If a second signature is required, notify your **Approving Official** and **Save and Unlock** the PD. Once both Supervisors have certified the PD, it is ready to move on to *Review* Status.

The last Supervisor to sign the **Associated Full Performance** PD should click **Submit for Review**. This will change the status of all the PDs from *Draft* to *Review*, and unlock all the PDs in the Career Ladder for HR *Review*.

Just as in other PDs, if no changes are requested, HR may pass all PDs in the Career Ladder directly to *Published* status.

If changes are requested, HR will directly edit the PD or add notes to each individual ladder PD and set the entire Ladder to *Revise* status. HR Classifier requirements (meaning Classifier-14 or 15 reviews) are based on the Full Performance Grade of the Career Ladder.

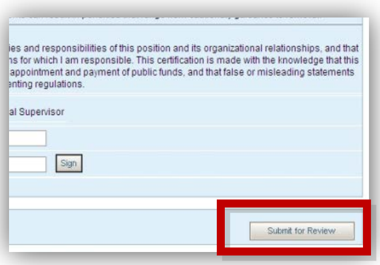
Revise and *Final Review* statuses work the same as any other PD type, and again, approvals and progression of the Ladder occur from the Full Performance PD only.

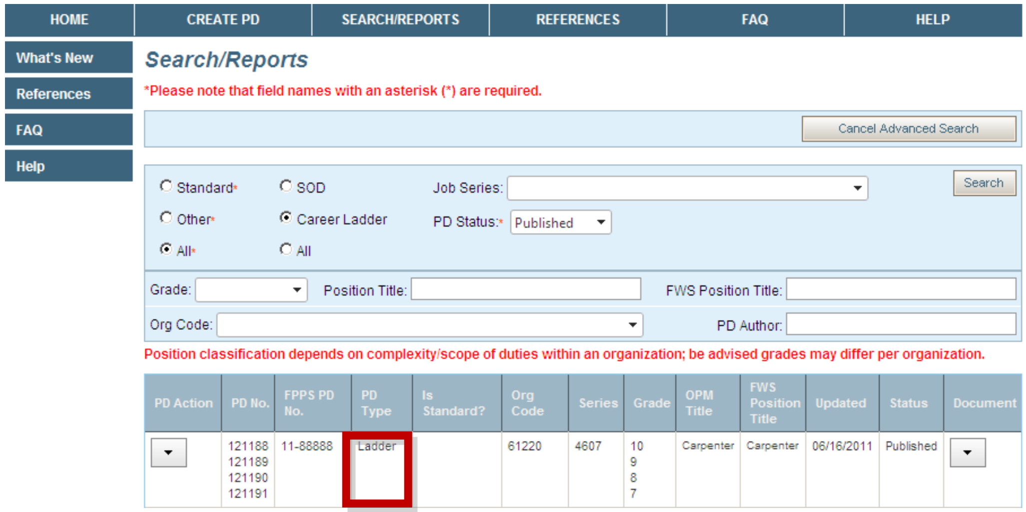
Searching for a Career Ladder

A Career Ladder PD can be located using the Search tool. If the CLPD is in *Published* status it is viewable by all PD Express users. Otherwise, viewing and editing the CLPD depends on role permissions and **organization code**.

When searching for a CLPD, choose **Other** and **Career Ladder** as the **PD Type**. The search results will display columns for **PD Type**, **Org Code**, **Series** and **Grade**.

The Search report will display all of the PDs in the ladder as a single, bundled, result. The PD Type will be listed as **Ladder**.

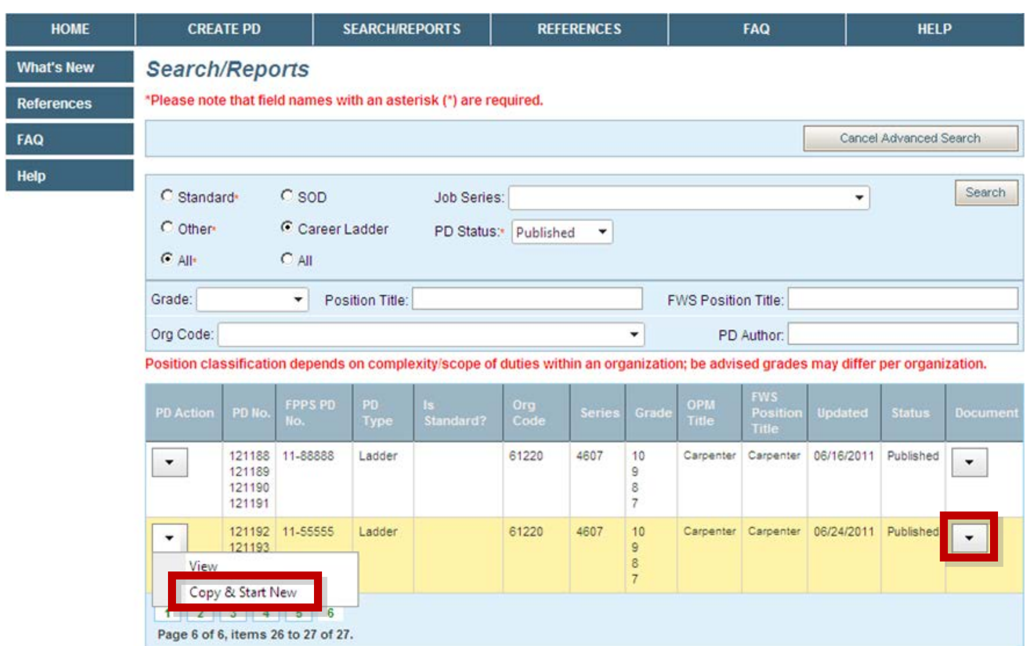




Copy/Existing Bundle feature within PD Express

PD Express has been enhanced to allow the end user to **View** an existing Ladder as a bundle and to **Copy & Start New** from an existing bundle to expedite the process (image below). If a user decides to Copy & Start New, the process is similar to the Copy and Start New process for a single PD, discussed in the **Create to Review Module.**

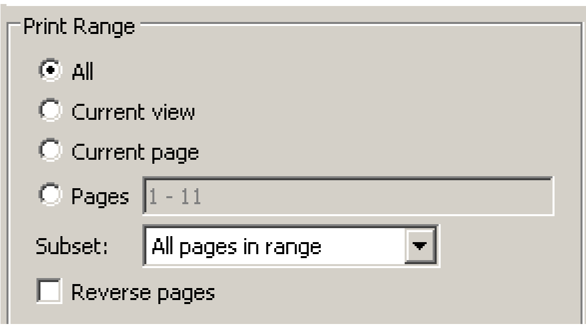
The data from each original PD in the ladder is automatically pre-populated into the required fields of each PD in the ladder. You can modify any active fields on each screen within the PD. Moving in between PDs in the ladder functions the same way as was detailed within the Start a New Career Ladder section earlier in this module. Once all PDs in the ladder have been updated and reviewed, the Supervisor and/or Approving Official will sign the **Approval** screen of the **FPL PD** and submit the bundle to HR.



Enhanced PDF Format for Career Ladders

PD Express has been enhanced to allow for the user to print out the entire Career Ladder in one PDF document. Thus, when the user selects the **View PD** button on the **Factors** screen, or when they access the PD PDF from the list of documents on the search screen PD Express will print out the PD and the OF-8 sections for every PD in the Ladder. The same is true for the Job Analysis, Evaluation Statement (if available) and the Comments PDF.

If the user wishes to only print out one specific PD in the Ladder they have the ability to select print ranges within the Print command box (as seen below). In this example the user could print out all eleven pages within the Ladder or define a range with the Pages box of the relevant areas of the Ladder they wish to print.



EXTRA CREDIT – Create a Career Ladder

HANDS ON…

EXTRA CREDIT: Create a CLPD

Create a Career Ladder based on the following scenario:

You need to fill a position at grade 9. However, you know the responsibilities for the position will grow over the next two years. Your plan is to bring in a candidate at a level 9 and provide training over the upcoming months. During that time, the employee will be promoted from the grade 9 position, to a grade 11 and reach a Full Performance position of grade 13.

When finished, record the PD Number of your Career Ladder PD as **Reference G, H and I** in your Activity Reference Sheet.

In this Extra Credit activity you will demonstrate the ability to successfully create a Career Ladder with 3 ladder positions. This activity has a high level of rigor and pre-requisite knowledge of PD creation, editing a PD, searching for a PD, and navigating the "My Tracker" dashboard.

Steps

1. Click **Create PD**
2. Choose **Create a Career Ladder Position Description**
3. Enter all required fields on the **Occupation** screen, indicating a **Proposed Full Performance Grade** of "13" and **Job Series** "486 – Wildlife Biology"
4. Click **Save and Continue**
5. Enter all required fields on the **Duties** Screen (ensuring **Major** duties total 100%)
6. Enter all required fields on the **Characteristics** screen
7. Verify the "OPM Job Family Standard for the given series – FES" **Factor Guide Evaluation Format** is selected
8. View and **edit Factor Language**, clicking **Save and Close** as complete
9. Choose **the 2 Step Interval** in the **Career Ladder Position Description.**
10. Select "9", "11" and "12" as the lower **Grades**
11. Click **Create Career Ladder Draft PDs**
12. Click **Occupation** on left side menu to view and edit Ladder PDs from this screen
13. Record the **PD number** of the **Associated Full Performance PD** as **Reference G** on your Activity Reference Sheet
14. Record the **PD numbers** of subsequent Ladder PDs as **Reference H, I** and **J** on your Activity Reference Sheet
15. Choose **Edit** from the Associated Career Ladder Position Descriptions of **Ladder PD #1 of 4** (this will be the lowest grade of the Ladder) and will be a Statement of Difference (SOD)
16. The system will take the user into a SOD screen where the end user will need to populate paragraph 1 with relevant language and then select the appropriate option in paragraph 2. The user will then select 'Save and Continue' which will take the user to the Occupation screen.
17. Notice the **Occupation** Screen information is mostly locked for editing though a few fields are available for editing. The user will then select the 'Save and Continue' button which will take the user to the Characteristics screen.
18. Click **Duties** in the left side menu to open the Duties screen
19. Modify the 1st **Duty** to match the change in responsibility of this lower-grade PD (delete 1 sentence of text)
20. Click **Save and Continue** and the user will be taken to the Characteristics screen.
21. Once in the Characteristics screen, select the 'Validate Data Fields' button and the

system will list any issues in the Ladder that need to be corrected. Once the changes are made, the user will select the ‘Save and Continue’ button and will be taken to the ‘My Tracker’ area.

22. Find the Ladder in ‘My Tracker’ and select ‘Edit’ to get back into the Career Ladder.
23. The user will now work on the PD for the GS11 position. This will differ from the previous section since the user will need to fill out a full PD. The user will start on the Occupation screen.
24. Upon completion of the Occupation screen, the user will select the ‘Save and Continue’ button, which will take the user to the Duties screen. Upon completion of the Duties screen the user will select the ‘Save and Continue’ button, which will take the user to the Characteristics screen.
25. Within the Characteristics screen the user will select the ‘Validate Data Fields’ button and the user will see what issues are associated with this PD that need to be addressed. Upon completing those actions the user will select the ‘Save and Continue’ button and will be taken to the Factors screen.
26. Within the Factor screen the user Validate Date Fields button to see if there are any issues associated with the Factors in this portion of the Ladder. If there are, the user will need to correct those factors and then select ‘Save and Unlock’ which will take the user back to the ‘My Tracker’.
27. From the My Tracker, the user will find the Career Ladder and select the Ladder PD #3 of 4 on the Ladder and select Edit. The user will then complete the steps 16-21.
28. Click **Save and Unlock** to return to “My Tracker” dashboard and locate the **Associated Full Performance PD** or **Ladder PD #4 of 4** (Reference G on Activity Reference Sheet)
29. Click **Approvals** on left side menu
30. **Sign** the PD (if you’re not a Supervisor locate an Instructor to sign your PD)
31. Find a partner with access to the Organization Code of your CLPDs and request they sign as **Additional Supervisor** (Be sure the partner is a Supervisor and has access to the **Organization Code** of the PD you created. If you cannot find a partner, an instructor can sign your CLPD)
32. Locate your partner’s Reference G using the **Basic Search**
33. Choose **Edit** from the PD Action menu to Sign your partner’s CLPD
34. Click **Approvals** in the left side menu
35. **Sign** your partner’s PD as **Additional Supervisor**
36. Click **Submit for Review**

Well Done! You have created your first Career Ladder.

From here, your CLPDs will move through the workflow as all other PDs do, the exception being all CLPDs move forward as a package or group. HR can either publish from *Review* status or mark all PDs as *Revise*. Just like in *Draft* status, a PD Creator will edit each CLPD independently and then **Sign** and **Submit for Final Review** from the **Associated Full Performance PD** only.

For the purpose of this training, we will not review the rest of the CLPD workflow, but do feel free to search for your CLPDs via **Search/Report**.

PD Express Summary

PD Express is designed to make creation of Position Descriptions easier and the hiring process less complex. To summarize what you've learned in training, below is key functionality and rules of PD Express:

- PD Express uses role-based security
- Login credentials are the same as Active Directory (ex. firstname_lastname@fws.gov)
- Create and edit all PD types
- PD Creators can view/edit PDs during *Draft* and *Revise* status and read-only mode during *Review* and *Final Review*
- Search the PD Express Library
- Create PDs from existing position descriptions or from scratch
- Edit Occupation information, Duties, Qualifications, Position Characteristics and Factor Language when drafting and revising PDs
- Pre-population of OPM compliant information
- Electronic Signing and Certification of PDs
- Print out PDF versions of documents
- Automated Workflow and "My Tracker" dashboard to monitor progress
- Weekly Escalated PD report to FWS Management (Assistant Director, HR Director / Human Capital Officer – HCO)

CONGRATULATIONS!

You have completed the PD Creator, most commonly Hiring Managers, portion of PD Express training. Human Resource (HR) users and Administrators will have more to learn, but most PD Express functionality has been covered in these Hiring Manager modules. For additional information, FAQs or Reference Materials, please refer to links in the PD Express tool.

U.S. Fish and Wildlife Service PD EXPRESS

PD Express: Introduction for Hiring Managers, HR and Admins

Module 6 – *Issue Tracker / Support Desk*

ISSUE TRACKER / SUPPORT DESK

About this Module

What you will See:

The content in this module explains the following PD Express features and functionality:

- Registering to use the Training Issue Tracker
- Logging in to the Training Issue Tracker
- Adding a new request/issue
- Updating a request/issue
- Adjusting settings within the Issue Tracker
- Registering to use the Production Issue Tracker

What you will Do:

1. Create and update a request/issue in Training
2. Register to use the Production Issue Tracker

https://pdexpress.fws.doi.net/training

HELP

Contact the Support Desk

At the bottom of the PD Express tool you will see a link reading **Support Desk.** Clicking this link will bring you the PD Express Issue Tracker.

Use the Issue Tracker to submit issues, requests, questions, enhancements to the tool and more to your **Regional Administrator.**

ON TRACK…

Issue Tracker Login Info

PD Express Issue Tracker login information is not synched with PD Express automatically.

Ensure proper set up on the Issue Tracker by using your PD Express User Name and Password when registering.

Issue Tracker Password Synch

Use your current **Active Directory password** when setting up your Issue Tracker account and the Tracker will keep your password in synch with Active Directory.

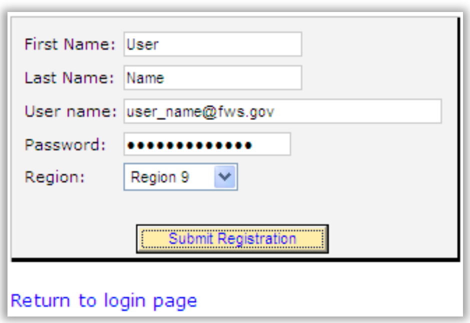
PD Express Issue Tracker

To centralize and manage user requests to Regional Administrators, PD Express includes a link to the PD Express **Support Desk**. Once clicked, this link opens up the **PD Express Issue Tracker**, also available at https://pdexpress.fws.doi.net/issuetracker/. This is a tool in which users can log requests for administrative activities and Administrators can manage work, provide comments to communicate with end users and complete requests.

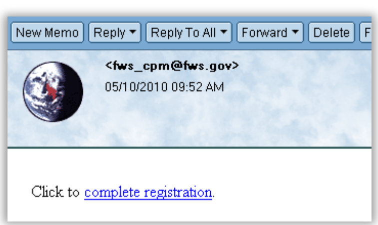
Register to Use the Issue Tracker

While this tool has a similar look and feel to PD Express, users must register with their FWS email address before logging in. Click **Register** on the homepage to begin.

On the registration page, enter your **First Name, Last Name** and enter your FWS email address as your **User Name.** Use your current **Active Directory password** and select your **Region**. Be sure to make your username and password the same you use for PD Express as you will receive a confirmation email to complete registration. Once information is entered, click **Submit Registration**.

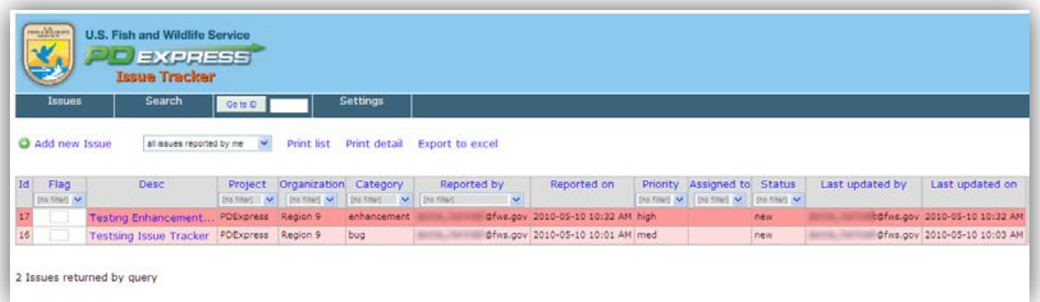


The PD Express Issue Tracker will send a confirmation email to your username with a link to **complete registration**. Click this link to be brought back to the **Issue Tracker** where you can log in.



Using the PD Express Issue Tracker

Upon logging in, you will be brought to the **Issues** screen. Displayed here is a list of issues related to your search query. By default, this will be "All Issues Reported by Me" for non-Admin users.



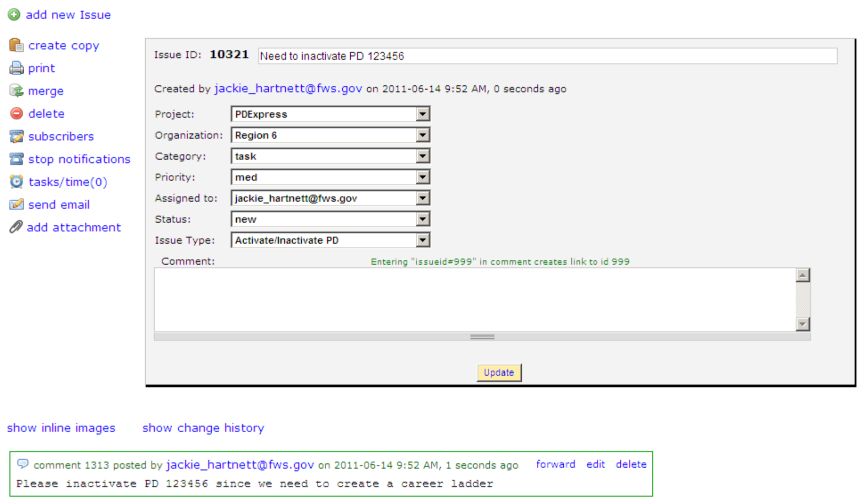
Notice there is color coding of issues by **Priority**. Let's explore this screen:

- **Add New Issue**: click to add a new request/issue to the tracker
- **Filter Drop-down**: changes the view of issues currently shown on Issues screen
- **Print List**: allows users to print the list seen on the Issues screen
- **Print Detail**: enables users to print the details of requests/issues shown on Issues screen
- **Export to Excel**: provides a Microsoft Excel version of Issues screen
- **ID**: unique identifier assigned to request/issue
- **Flag**: allows an Administrator to flag/unflag a request/issue (flag color options include **red**, **green** or no color)
- **Desc**: the description of the request/issue input by the PD Express user
- **Project**: defaulted to PD Express, this field may be updated with any projects found in the Issue Tracker
- **Organization**: Region of the PD Express user who reported the request/issue
- **Category**: type of request/issue (Task, Question, Enhancement, etc)
- **Reported by**: user that initially created the request/issue
- **Reported on**: date this request/issue was created
- **Priority**: the priority of the request/issue and drives the highlighting of issue color on Issue screen (High = **dark pink**, Medium = **light pink** and Low or No Priority = no highlighting)
- **Assigned to**: Admin user this request/issue is assigned to
- **Status**: status of the request/issue (New, In Progress, Closed)
- **Last Updated by**: user that last updated the request/issue
- **Last Updated on**: date this request/issue was last updated

Add a New Issue

To log a request/issue click the **Add New Issue** link on the Issue screen. You will be directed to the create screen where the following fields must be populated: **Description**, Category, Priority, Assigned to, **Status**, **Issue Type** and **Comment**. In the example below the end user is requesting that a PD become inactivated.

Include specifics of your request/issue in the **Comments** field. Once finished, click **Create** and you will be shown the request details including **Issue ID**.



Review and Update Issues

To **view** and **edit** an issue, click on the **Description** text link. Once opened, you have access to add **Comments**. Type any information necessary into the **Comments** and click **Update** to save. Administrators will make all other updates to this request/issue. In the example below the PD has been inactivated and the administrator has closed this issue.

From this update screen users can also **Create a Copy** of this issue as a new issue, **Print** details of the issue, view users that currently **Subscribe** to updates, **Get Notifications** of updates (become a **Subscriber**), **Send Email** to any user referencing the request/issue and **Add Attachments** as needed.

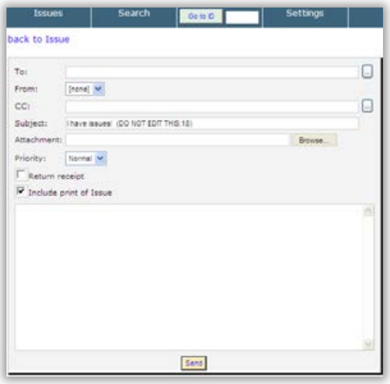
The **Send Email** functionality is easy to use. Type the email address of your recipient into the **To** field, select your name as **From (**which will be auto populated**)** and select to **Include Print** of **Issue**. Fill in the free-form text field, click **Send** and your email is on its way!

ON TRACK…

Include Attachments!

It is best practice to include attachments when creating and updating a request/issue to ensure all details of the request are clear.

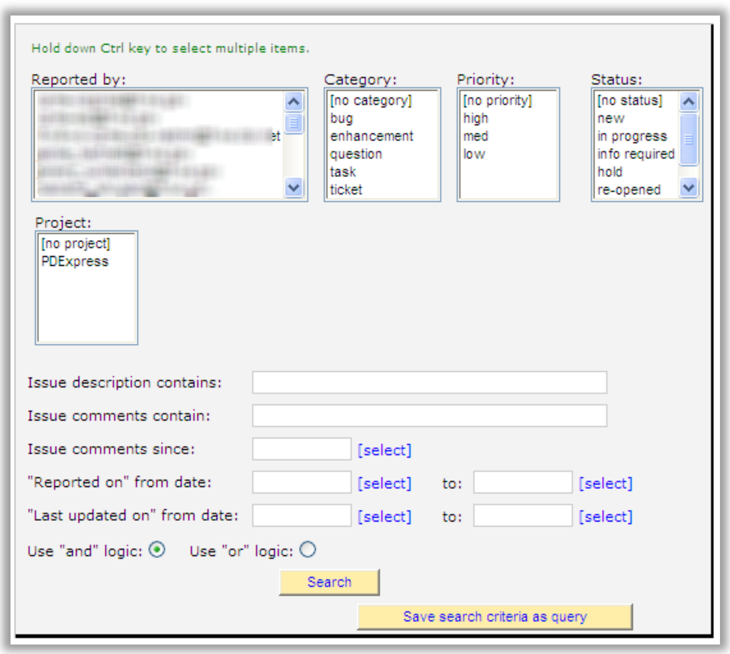
This will help your Administrator resolve Issue Tracker requests quickly.



Searching the Issue Tracker

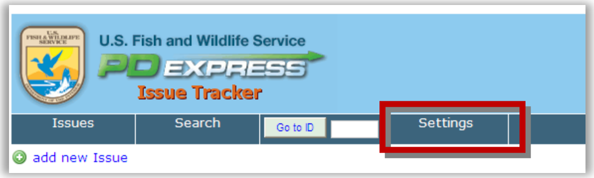
To search and locate a request/issue click **Search** at the top of the webpage from any screen inside the Issue Tracker.

This will bring you to the **Search** screen where you look for request/issues based on a number of filters: **Reported by, Category, Priority, Status, Project** and more. Apply desired filters and click **Search**. Click **Save Search Criteria as Query** if this will be an ongoing search for you.

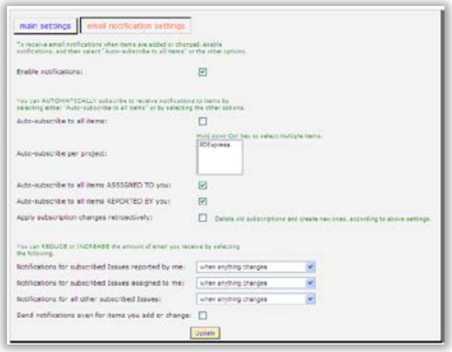


Issue Tracker Settings

To **edit** things like **Issues shown per Page**, **email addresses**, **notification settings** and more, access the **Settings** link from the top of the webpage on any screen.



From here you can choose to edit either **Main Settings** or **Email Notification** settings. Be sure to click **Update** once finished to ensure any changes are saved appropriately.



Remember that the **PD Express Issue Tracker** is accessible via the **Support Desk** link or website address, it is not directly synched with PD Express.

Types of Requests to Log in Issue Tracker

Use the PD Express Issue Tracker for requests/issues that require **Regional Administrator** atttention. Such requests/issues include:

- Activate, Modify or Inactivate a User Account
- Add / Remove Organization Codes
- Delegate PDs to another user
- Activate / Inactivate a PD
- Training Questions
- Issues with the PD Express tool
- Suggested enhancements to PD Express

Activity 1 – Create a Request in PD Express Issue Tracker

HANDS ON…

Goal:

Register Create 1 Training request/issue

Request that a PD be delegated to another user

Add a comment to a request/issue

Use **Reference C** from your Activity Reference Sheet to complete this activity.

Register to Use Production Issue Tracker

Part 1 – Create a Request/Issue in Training Issue Tracker

1. Click **Support Desk** from the bottom of your screen
2. On Issue Tracker Login screen, click **Register**
3. Type in your **First Name**, **Last Name**, PD Express **username**, PD Express **password** and select your **Region**
4. Click **Submit Registration**
5. Log on to your FWS email and locate the confirmation email
6. Click **complete registration** in the confirmation email
7. **Log** into the Training Issue Tracker (website will be https://pdexpress.fws.doi.net/trainingissuetracker

Part 2 – Create a Request/Issue in the Issue Tracker Training Environment

8. Click **Add New Issue**
9. In the **Description**, type "**Delegate PD ###### (**use **Reference C**) **to User_Name**"
10. Leave Category and Priority as default "blank" and Status as **new**
11. Mark Issue Type as **Delegate a PD**
12. Click **Create**

Part 3 – Update an issue with a comment

13. Once you see your **Issue ID** for Delegate PD request, type text into the **Comment** field stating, "Delegate PD ###### (use **Reference C**) to John Smith by MM/DD/YYYY as I will be out of office"
14. Click **Update** to see your comment added below the request/issue details

Part 4 – Register to Use Issue Tracker in Production

15. Go to https://pdexpress.fws.doi.net/issuetracker
16. On Issue Tracker Login page, click **Register**
17. Type in your **First Name**, **Last Name**, PD Express **username**, PD Express **password** and select your **Region**
18. Click **Submit Registration**
19. Log on to your FWS email and locate the confirmation email

20. Click **complete registration** in the confirmation email

Congratulations! You've created your first issue in the Issue Tracker.

U.S. Fish and Wildlife Service PD EXPRESS

PD Express: Introduction for HR and Admins

Module 7: *Evaluation and Classification*

EVALUATION AND CLASSIFICATION: HR ONLY

About this Module

What you will See:

The content in this module explains the following PD Express features and functionality:

- Evaluator and Classifier Role
- HR Position Characteristics (Coding Information for OF-8)
- Factor Recommendations
- Evaluation Statement and Justifications
- Certifying and Publishing a PD
- HR Only Functionality Highlights

What you will Do:

1. Review, suggest changes, add Position Characteristics (coding information for OF-8) and add change request Notes to a PD
2. Review Factors, update language and provide Factor Recommendations
3. Add an Evaluation Statement and Series, Grade, Title and Factor Justifications
4. Certify and move a PD from *Review* to *Publish* status

PD Express HR Evaluator and Classifier Roles

Evaluation and Classification occur through three main roles of HR users within PD Express: Evaluator, Classifier 14, and Classifier 15.

In addition to the ability to create PDs and SPDs under all **Organization Codes** to which they have access, users with these roles play a critical role in ensuring PDs are compliant with Federal Regulations and OPM standards. Role functionality includes:

- An **Evaluator** can review and certify a PD at *Review* and *Final Review* status
- A **Classifier 14** can review, certify and publish PDs grade 14 and below
- A **Classifier 15** can review, certify and publish PDs, as well as perform high-grade review of PDs with a grade of 14 or 15

If any of the above users are deemed a Supervisor within the Service, they can then also sign PDs as a Supervisor (*Draft/Revise* status).

Evaluation, classification and publishing of PDs can occur at the *Review* status, as well as the *Final Review* status of a PD.

Evaluators and Classifiers may certify a PD. However, only the Classifier can set a PD to *Published* status. For this reason, if necessary, it makes most sense for evaluation to occur *prior to* classification.

ON TRACK…

HR – Final Stop

The PD Creator has the option of editing during *Revise* status based on the review recommendations of the Evaluator, Classifier or Human Capital Officer (HCO).

PD Express does not allow a PD to be sent back to the PD Creator from *Final Review* status.

If the PD is set to *Final Review* status with outstanding issues or conflicting opinions preventing a PD from moving to *Published* status, a member of the HR team should directly contact the PD Creator to resolve the issue.

Good communication will help every PD reach completion.

Standard PD (SPD) versus Unique PD

As we've learned, SPDs can be created by HR users only. These PDs work much like creating a PD from scratch in PD Express. However, it is important to note the following information regarding SPDs:

- Organization Code, Subdivisions, Employee Office Location, Duty Location and Supervisor Signatures are not required fields
- SPDs will not have pre-populated Introduction Statements
- There is no pre-population of data from existing PDs

PD Review and Final Review

Following *Draft* and Supervisor approval, a PD is set to *Review* status. During *Review*, the Evaluator and Classifier roles look at information entered by the PD Creator and check for consistency with OPM set classification standards. If the information within the fields is not accurate or is out of compliance, the HR reviewer will determine the correct course of action. These can include:

1. Make updates directly to the PD to ensure compliance (PD Creators will have a chance to verify this information in *Revise* status)
2. **Add a note** to the PD requesting a change in data (when PD in *Review* status, data is then editable by the PD Creator once the PD is in *Revise* status)
3. Directly contact the PD Creator or PD Creator Supervisor if they should:

a. Create a new PD using a different PD or SPD
b. Create a new PD from scratch
c. Create an SOD PD rather than a new PD

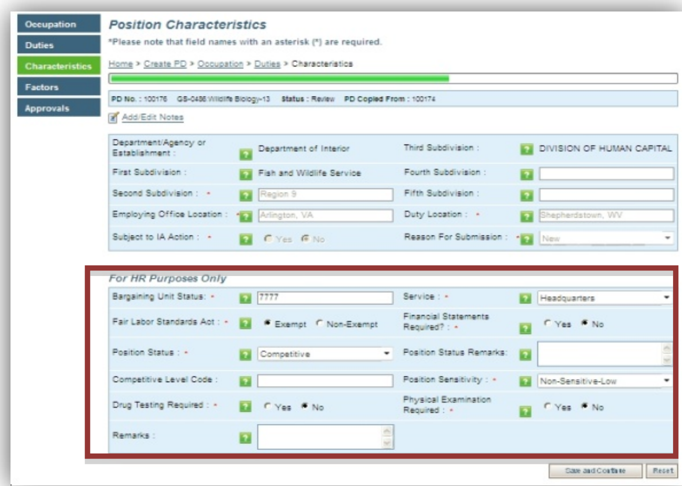
Occupation & Duty Information

HR users can directly update all fields (including the FPPS PD No.) on the **Occupation** screen during *Review*. The FPPS PD Number is the internal PD number and it must be entered prior to moving a PD to *Published* status. PD Express will validate for this information in *Review* and *Final Review* statuses.

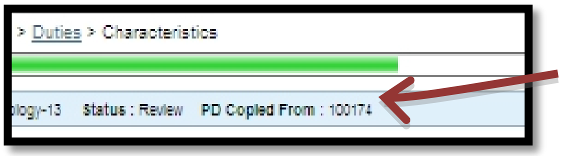
HR can also make changes to all fields on the **Duty** screen. All edits that HR makes to the PD during Review status will be highlighted to the PD Creator in Revise status and must be accepted or rejected by the PD Creator before they can certify the PD.

Position Characteristics Coding Information (OF-8)

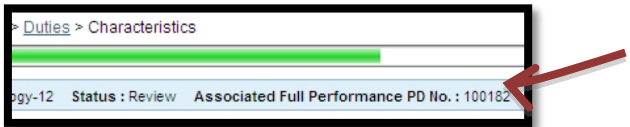
As we've seen in previous modules, the **Characteristics** screen contains two sections, a section for PD Creators and a bottom section for HR to populate. Both sections contain required information to code the position and to recruit proper candidates. The PD Creator completes the top portion of the screen during *Draft* status. This section is editable to HR in Review status, in case corrections need to be made. The lower section of this screen is editable only by HR during *Review* and *Final Review*.



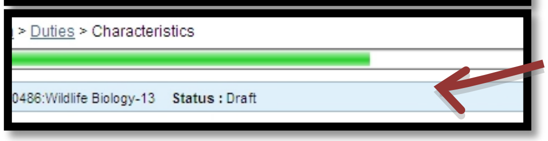
Some fields may be pre-populated with default values. This pre-population may be due to data entered on other screens while the PD was in *Draft* status. Pre-population also occurs when the PD was created from an existing PD. Information about a PD's origin can be found beneath the progress bar.



PD Copied From indicates the PD was created from an existing PD.



Associated Full Performance PD No. indicates the PD is an SOD or Career Ladder PD.



An empty space to the right of the status is an indication the PD was created from scratch (not based on a PD or SPD).

Activity 1 – Review, Add Position Characteristics and Notes

1. Find a partner
2. Locate your partner's **Reference D** PD using **Search** or your "My Tracker" dashboard
3. From the **PD Actions** column, **Edit** the PD
4. Use the left side menu to review the **Occupation** and **Duties** screens for accuracy
    a. On the Occupation Screen, edit the Position Type
    b. On Occupation Screen, enter an FPPS PD No. (any alphanumeric combination will suffice for training)
    c. On the Duty screen, add a new Other Duty and add an Overall Qualification
5. Click **Characteristics** on the left side menu and review the top portion of the screen.
    a. Change the Employing Office Location (any city will suffice for training)
    b. Complete the bottom section labeled For **HR Purposes Only**. This will populate the Coding Information (OF-8) form.
6. Add 2 **Notes** to Reference D with a suggestion that the FWS Position Title and 1 Duty be updated (any update… make one up!)
    a. Click **Add/Edit Notes** from the top of any PD screen
    b. Type your note into the text field, click **Add Note**
    c. Verify the note is now shown in bottom section of pop-up window with *Review* listed as workflow status
    d. Click **Close** to close this window once complete
7. Click **Save and Continue**

HANDS ON…

***Goal*:**

Review a PD for accuracy

Edit PD for compliance

Add Position Characteristics

Add 2 Notes to PD Recommending Updates

Use **Reference D** from your Activity Log to complete this activity. Reference D should be in *Review* status. If you did not draft **Reference D**, feel free to use any PD in *Review* status.

You have completed the first step in HR Review. Next up, let's review **Factors**.

Challenge Answer

The appropriate action for the HR Evaluator during *Review* is to add a **Note** indicating this field should be updated**.**

HELP

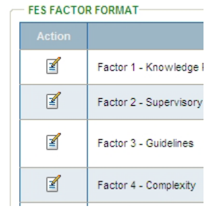
Show Difference

PD Review should include reviewing **Factor Language** for each factor. The PD creator may have added, removed or modified suggested language. The most efficient way to identify any changes in factor language is to use the **Show Difference** report located at the bottom of the **Factors** screen.

Once you spot factors in need of clarification, **Go Back** to the **Factors** screen to add recommendations.

Reviewing Factor Language

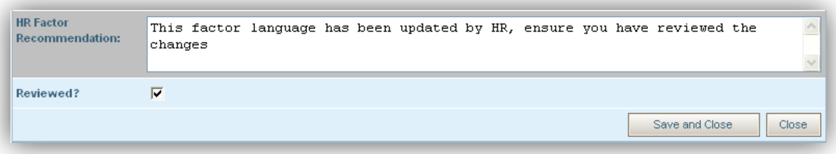
Factor Recommendations



To review **Factor Language** and include **Factor Recommendations**, click the edit icon in the **Action** column for the Factor in need of clarification.

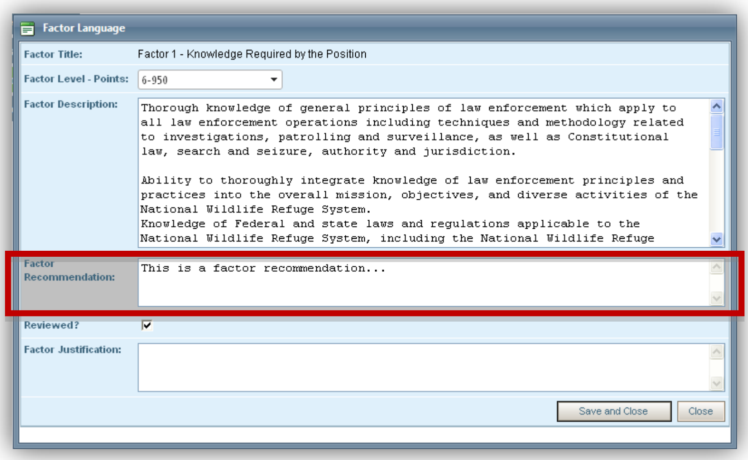
The **Factor Level - Points** and **Description** are directly editable by HR. In the Factor Language pop-up, HR users can update the **Factor Level-Points** to a higher or lower level (remember this wipes out the current language) and/or edit text directly in the **Factor Description** field. To highlight changes made type directly into the optional **Factor Recommendations** text field with details of the updates. The PD Creator will review recommendations during *Revise* status.

If you forget to add details about your updates, PD Express will populate the **Factor Recommendation** field with text that tells user that HR has updated language and they need to **Accept** or **Reject** the changes to move the PD to *Final Review*.

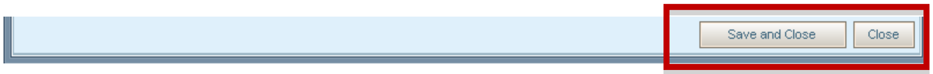


During *Revise*, PD Creators are required to click into any factor with a recommendation present. They have the option to **Accept** or **Reject** the provided changes or edit the **Factor Description** manually, and mark the **Reviewed?** checkbox.

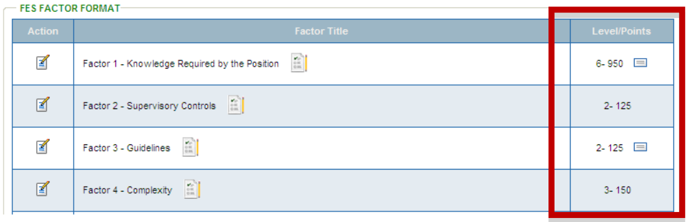
HR users also have the option to fill in the **Factor Recommendation** field with suggested updates without updating the description field. Simply enter a recommended update into the **Factor Recommendation** text box.



Once you are done providing feedback, click **Save and Close** to save your changes and close the dialog box. Or, click **Close** to close without saving.

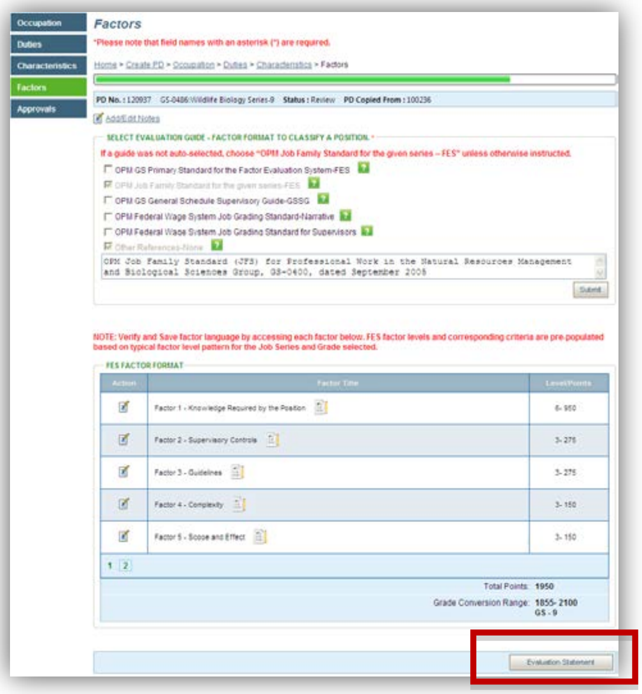


Be sure to review all factors before certifying the PD. You will notice Factors containing recommendations will display an icon next to the Factor Level.



Adding an Evaluation Statement

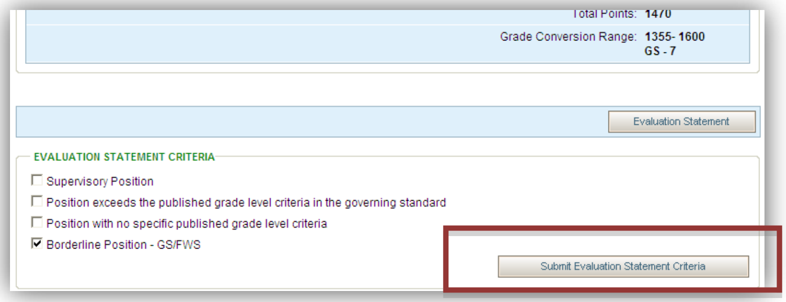
HR determines the need for an **Evaluation Statement**. The information for this document can be entered on the **Factors** screen by selecting **Evaluation Statement** just below the **Grade Conversion Table**.



Evaluation Statement Criteria

The **Evaluation Statement** establishes the rationale of the P**ay Plan, Title, Job Series,** and **Grade** as well as level and points for each position. If an **Evaluation Statement** is appropriate, **Factor Justifications** can be added at the same time recommendations are entered.

Select the **Evaluation Statement Criteria** from the list provided by clicking the checkbox of each applicable criterion (you may select multiple).

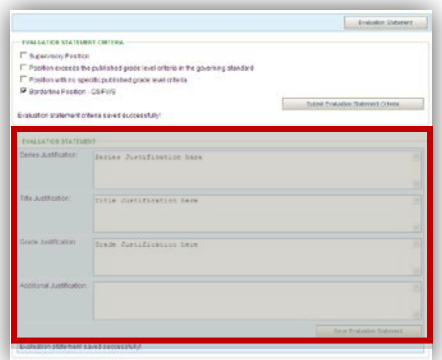


Click **Submit Evaluation Statement Criteria** to expand the Evaluation Statement section of the Factors screen.

> **ON TRACK…**
>
> If you know the PD will require an **Evaluation Statement**, you may want to review **Factor Language** and add **Recommendations** *after* you create the Evaluation Statement. The **Factor Justification** field will not display in the **Factor Language** pop-up box until *after* **Evaluation Statement** is selected.

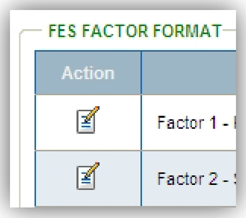
Adding Evaluation Statement Justifications

Evaluation Statement fields include **Series Justification**, **Title Justification**, **Grade Justification** and **Additional Justification.** No one field is required, but be sure to include enough information to justify the criteria selected. Click **Save Evaluation Statement**. You'll see a message stating "Evaluation statement saved successfully!" when done.

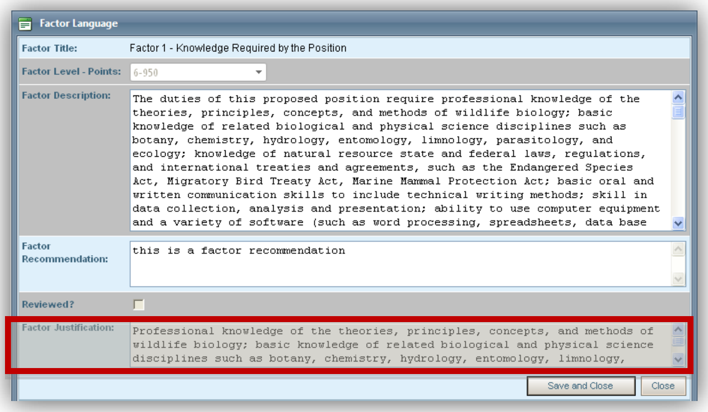


Factor Justifications

Once the **Evaluation Statement** is saved, the **Factor Justification** field is made available within each Factor. To add a **Factor Justification**, click the edit icon in the **Action** column of the Factor.

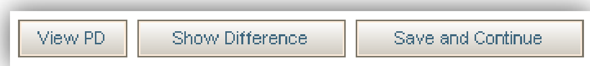


Enter text to justify the Factor, then **Save and Close** to save changes to the **Factor Justification**, as well as changes in **Factor Recommendation.** These fields are optional, but be sure to provide enough information to justify the factor level and points.



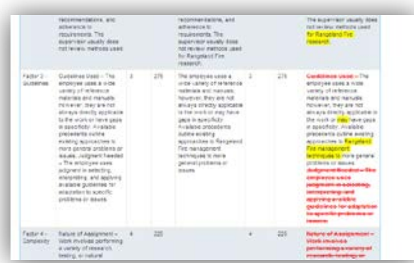
View PD

At this point, click **View PD** to download, print and view the PDF version of the Position Description or view all PD documents via **Search/Reports**. (See [Getting Started with PD Express]() module for more info on PDF documents).



Show Difference

As mentioned, a good tool to use when you need to quickly review changes to factor language is the **Show Difference** report. Additions to original text will display in yellow highlight, while deletions will display in a red with strikethrough (crossed out) text format.



Use the **Go Back** button at the bottom to return to the Factors screen.

HANDS ON…

Goal:

Review Factors

For this activity we will recommend updates to 3 factors on Reference D

Use **Reference D** from your Activity Log to complete this activity. If you did not draft **Reference D**, feel free to use any PD in *Review* status.

Activity 2 – Review Factors

Through completion of this activity you will demonstrate the ability to review **Factors** and make **Factor Recommendations**. This activity is a continuation of HR Review performed in Activity 1. You may have already completed steps 1-3 below as part of Activity 1.

1. Find a partner
2. Locate your partner's Reference D PD using **Search** or your "My Tracker" dashboard
3. From the **PD Actions** column, **Edit** the PD
4. Click **Factors** on the left side menu to navigate to the **Factors** screen
5. Click **Show Difference** to review all Factor Language at once
6. Return to the Factors screen using the **Go Back** button
7. Choose the first factor. Click the **edit icon** to view
8. Review factor language and update directly into the **Description** field
9. Click **Save and Close**
10. Click back into the first factor and verify the **Factor Recommendation field** reads "This factor language has been updated…"
11. Repeat steps 7-9 for factor 2 and assume all other factors are correct
    a. On 1 of the Factors do not edit the Description, simply type in a **Factor Recommendation**
12. Click **Save and Continue**

HANDS ON…

Goal:

Create an Evaluation Statement

Create an Evaluation Statement and add Factor Justifications.

Use **Reference D** from your Activity Log to complete this activity. Reference D should be in *Final Review* Status. If you did not draft **Reference D**, feel free to use any PD in *Final Review* status.

Activity 3 – Add and Evaluation Statement and Factor Justifications

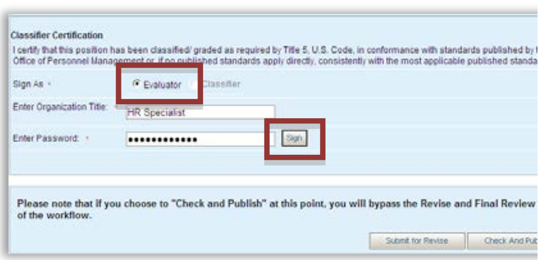
1. Locate a partner's Reference D using **Search** or "My Tracker" dashboard
2. From the **PD Actions** column, **Edit** the PD
3. Click **Factors** on the left side menu to navigate to the **Factors** screen
4. Verify the appearance of the icon to the right of the Factor Level
5. At the bottom of the **Factors** screen, click **Evaluation Statement**
6. Select "Supervisory Position" option from the **Evaluation Statement Criteria** list
7. Click Save **Evaluation Statement Criteria**
8. Enter text into one or more of the **Justification** text fields
9. Click **Save Evaluation Statement**
10. Return to the first factor. Click the **edit icon** to view
11. Add a **Justification Statement** to Factors 1 and 2, click **Save and Close**
12. **View PD** to view and/or download a PDF version of the PD
13. Click **Save and Continue**

Certification (Signing the PD)

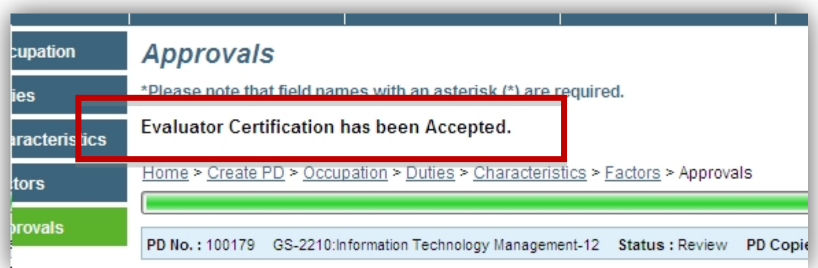
A Classifier must certify every PD before it can be *Published* while Evaluator and HCO certifications are important in certain circumstances. Any HR user can recommend changes during *Review* status using both the **Notes** tool or editing Factor Language, directly, but if no revisions are needed, a PD can be Published from *Review* status. If changes are required, certification can occur at *Final Review* status.

Regardless of whether certification happens at *Review* or *Final Review* status, the steps for the Evaluator remain the same.

- Using the left side menu, navigate to the **Approvals** screen
- Choose **Evaluator** from **Sign As**; enter your title within your organization, and your **Password**
- Click **Sign**

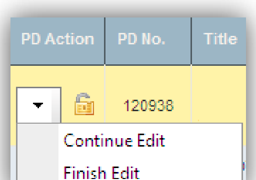


A Confirmation message will appear indicating successful certification.



If the PD needs to go back to the PD Creator for revision, the Evaluator can click **Submit for Revise**. Doing so will move the PD to *Revise* status allowing the PD Creator to **Edit** the PD and **Notes**, as well as gain **Supervisor Approval(s)** before re-submitting for *Final Review*.

If no changes are recommended, the Evaluator can certify the PD and exit editing by choosing **Save and Unlock** on the **Approvals** screen or return to “My Tracker” to unlock the PD by clicking **Finish Edit.** At this point, the Evaluator should notify a Classifier the PD is ready to be signed and *Published*.



ON TRACK…

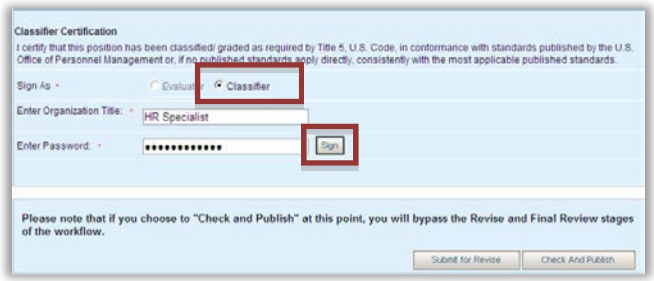
Finish Edit

While it is technically possible for a HR user to break the lock set by another, best practice is for the Evaluator to unlock the file **using Save and Unlock** from the **Approvals** screen.

Of course, live communication between users is always the best way to resolve confusion and promote collaboration.

Classifier Certification

Certification by a Classifier follows the same procedure as the Evaluator; however, the selection of **Classifier** as **Sign As** is more appropriate.

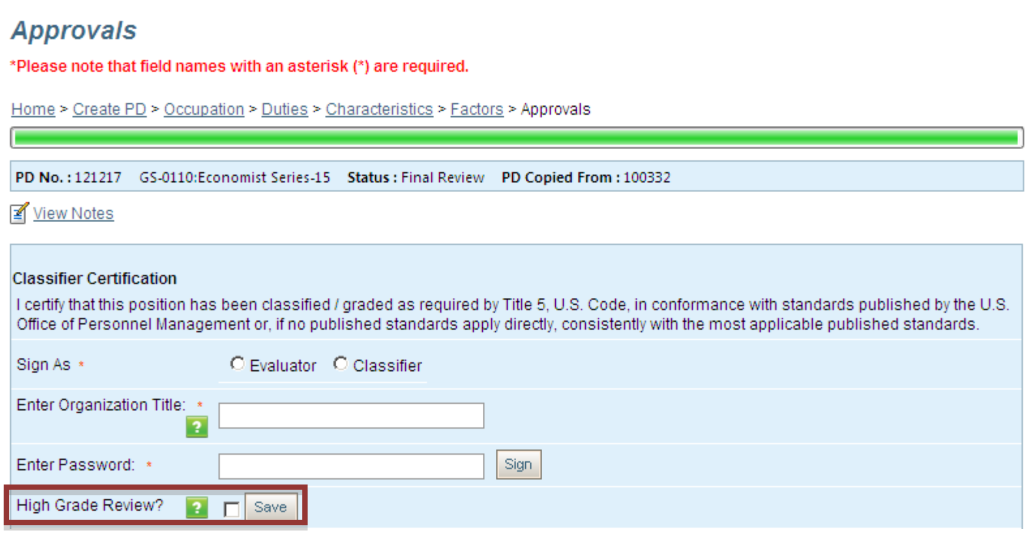


High-Grade Review and Classification

The majority of PDs moving through the PD Express workflow require certification of a single Classifier. However, special circumstances exist in the case of grade 14 or 15 PDs. These PDs require an additional **High-Grade Review** step and the signature of the **HR Classifier 15.**

Users with the role of HR Classifier 14 or HR Classifier 15 can sign Position Descriptions up to and including **Full Performance Grade** 14. Only a Classifier 15 can sign PDs up to and including a **Full Performance Grade** 15.

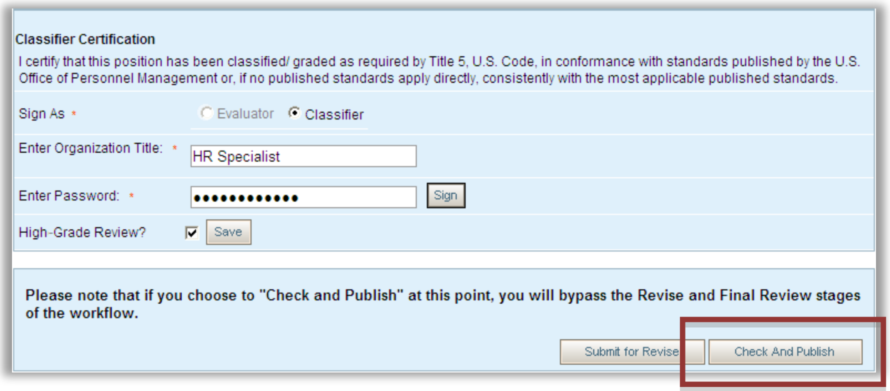
In addition to Classification, Grade 14 and 15 PDs require a **High-Grade Review** to be conducted by an HR Classifier 15 before the PD can be marked *Published*. **High-Grade Review** is indicated via a checkbox located on the **Approvals** screen. This checkbox and **Save** button are available only to the HR Classifier 15 role.



Check and Publish

From the **Approval** screen, a Classifier has the option to **Check and Publish** a PD. This option is available at *Review* status as well as *Final Review* status.

Clicking **Check and Publish** will run through a final validation of the PD. Validation messages must be addressed before the PD can move to *Published* status.



HR Only Functionality Highlights

As you've learned throughout training, there are functional differences for PD Creators and HR users in PD Express. In summary, below is key functionality and rules only HR users have access to:

- Assignment of Evaluator, Classifier-14, Classifier-15 or HCO roles
- Access to search for, create and view PDs for all **Organization Codes** within your PD Express access
- Ability to **Create Standard Position Descriptions** (SPD)
- Edit access to HR only portion of Position Characteristics screen (coding information for OF-8)
- Access to **View** and/or **Edit** PDs during *Review* and *Final Review* status
    - **Edit all fields** on PD directly to suggest updates for HM to review and approve
    - Add recommendation **Notes** to overall PD\
    - Update **Factor Language** directly in the **Description** field
    - Populate **Factor Recommendations** fields
    - Add an **Evaluation Statement**
    - Populate **Factor Justification** fields
- Ability to Certify and Publish a PD

Final Stretch!! Let's move on to the last few activities of PD Express Training for HR…

HANDS ON…

Goal:

Certify a PD

Add a Certification Signature to the PD

Use **Reference D** from your Activity Log to complete this activity. If you did not draft **Reference D**, feel free to use any PD in *Final Review* status.

Activity 4 – Evaluator Certification of a PD

Upon completion of the following activity you will have demonstrated the ability to certify a PD. This is a continuation of Activity 3 (Create Evaluation Statement). We will be getting Reference D ready for *Revise* status. If you created your own Reference E during Extra Credit, feel free to use that PD to publish.

1. Locate a Partner's **Reference D** PD via Search or "My Tracker" dashboard
2. From the **PD Actions** column, **Edit** the PD
3. Click **Approvals** from the left side menu to navigate to the **Approvals** screen
4. Select **your role (Evaluator or Classifier)** as the **Sign As**
5. Enter your **Organization Title**
6. Enter your PD Express **Password**
7. Click **Sign**
8. Click **Submit for Revise**

HANDS ON…

Goal:

Publish a PD

Add a Classifier signature to the PD and Publish directly from *Review* status

Use **Reference E** from your Activity Log to complete this activity. **Reference E** should be in *Review* status with no recommended changes.
If you did not draft **Reference E**, feel free to use any PD in *Review* status.

Activity 5 – Classifier Certify & Publish a PD

You will need a PD in *Review* or *Final Review* status, and be in the role of a PD Express Classifier to complete this activity. If you are not a Classifier, please ask an instructor or a Classifier to demonstrate publishing.

9. Locate a Partner's **Reference E** PD via Search or "My Tracker" dashboard
10. From the **PD Actions** column, **Edit** the PD
11. Click **Approvals** from the left side menu to navigate to the **Approvals** screen
12. Select **Classifier** as the **Sign As**
13. Enter your **Organization Title**
14. Enter your PD Express **Password**
15. Click **Sign**
16. Click **Check and Publish**
17. If applicable, clear any validation issues and reselect **Check and Publish**

Activity 6 – Test Your Knowledge

HANDS ON…

Goal:

Test your Knowledge of PD Express through Scenarios

Write your answers in the space provided.

The following scenarios represent practical application of the schedule, workflow and business logic implemented through PD Express. Use the information gathered throughout training to respond.

1. A user with the role of Supervisor creates a new PD from scratch. The Full Performance Grade is 14. How many total signatures are needed on this PD in order to publish? Does this PD require High-Grade Review?

2. A grade 7 PD created from an existing SPD is accurately and completely filled out by a Hiring Manager, with no suggestions for revision from HR. What does this PD need in order to go directly from *Review* to *Published* status?

3. HR sent a PD from *Review* to *Revise* status. Notes added by HR recommend some wording changes to help with grammar issues in the PD. The Hiring Manager does not feel the suggestions made in the notes are relevant. What should the Hiring Manager do?

4. A Supervisory PD was given an FWS Position Title that is not normally used by OPM and highly unusual for FWS. Will this title variance be caught by PD Express validation?

5. A grade 11 PD needs to be reviewed and classified by HR. Can a user with the role of Classfier 15 perform this function?

U.S. Fish and Wildlife Service PD EXPRESS

PD Express: Introduction for Administrators

Module 8: *Administrator Functionality*

ADMINISTRATOR FUNCTIONALITY – ADMIN ONLY

About this Module

What you will See:

The content in this module explains the following PD Express features and functionality:

- Difference in Regional and Global Administrator responsibilities
- Activate a User Account
- Maintain a User Account
- Delegate a PD
- Activate and Inactivate a PD
- Update Introduction Statements
- PD Express Issue Tracker for Admins
- Administrator Only Functionality Highlights

What you will Do:

1. Activate a user account
2. Practice maintaining and inactivating a user account
3. Demonstrate how to delegate a PD
4. Inactivate a PD
5. Practice using the Issue Tracker for Admins

Administrator Responsibilities

Administrator (Admin) roles are responsible for additional functionality in the PD Express tool including user account maintenance, PD delegation and PD activation/inactivation.

While responsibility is similar among Regional and Global Admin roles, there are a few key differences in access, specified in the next sections of this training.

Regional Administrator

The Regional Admin role has access to settings within their assigned Region only. This role can **activate**, **modify** and **inactivate user accounts** as well as **delegate**, **activate** and **inactivate PDs** for users; they can also maintain **Organization Code Introduction Statements** within the assigned Region only.

Depending on access level, a Regional Admin may also be able to **Create PDs** and complete Supervisory Certifications.

Key Activities (Region-wide access):

- Activate, modify and inactivate a user account
- Delegate a PD
- Activate and Inactivate a PD
- Create a PD*
- Complete Supervisory Certification**

Global Administrator

The Global Admin role has access to settings for the entire Fish and Wildlife Service (FWS). This role can **activate**, **modify** and **inactivate user accounts** as well as **delegate**, **activate** and **inactivate PDs** for users; they can also maintain **Organization Code Introduction Statements** throughout the Service.

Depending on access level, a Global Admin may also be able to **Create PDs** and complete Supervisory Certifications.

Key Activities (Service-wide access):

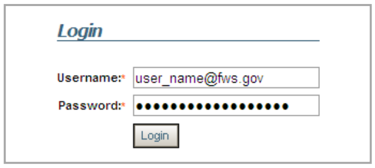
- Activate, modify and inactivate a user account
- Delegate a PD
- Activate and Inactivate a PD
- Create a PD*
- Complete Supervisory Certification**

* If resource is designated an official Team Lead in FPPS

** If resource is designated an official Supervisor in FPPS

Administrator Account Login

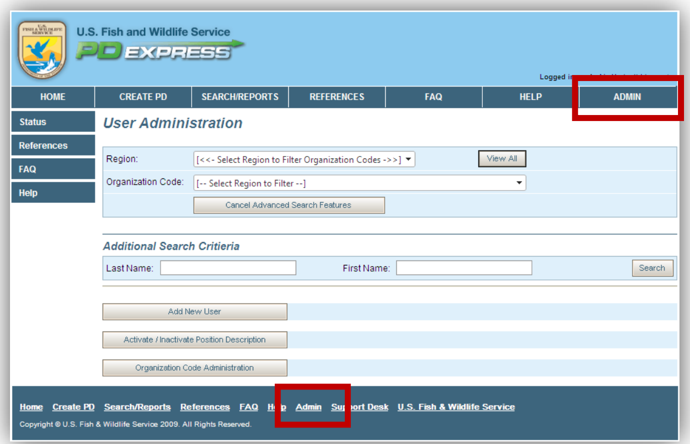
Log in to PD Express via the FWS portal or directly at the secure website. Your PD Express login is synchronized with your Active Directory network account.



To log in to the tool, complete the following steps:

1. Open Internet Explorer and navigate to https://pdexpress.fws.doi.net/training
2. Enter your FWS login credentials (Active Directory) and select **Login**
3. On the header or footer of the homepage Select **Admin** to access administrator functionality

This top-level admin page will be your home-base for most admin functionality.



Let's take a few moments to explore the Admin menu options:

- **View All:** View all PD Express users within your role access
- **Organization Code:** Apply this filter to search for and/or update a user account (options differ based on **Region** selected)
- **Search:** View user accounts meeting search criteria
- **Advanced Search Features:** Search for users by **Last** and/or **First Name**
- **Add New User:** Add a brand new user to PD Express **Region:** Apply this filter to search for and/or update a user account
- **Activate/Inactivate Position Description:** Activate and inactivate a PD; search for PD by PD Number, PD Creator, Organization Code, etc.
- **Organization Code Administration:** View and manage updates to Organization Code Introduction Statements

ON TRACK…

FPPS to PD Express Synch

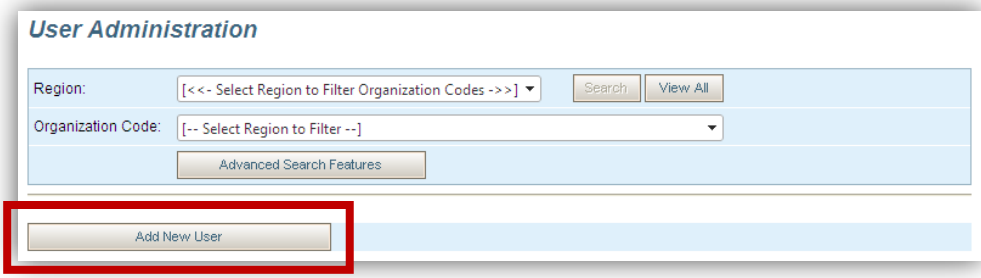
FPPS data is synchronized with PD Express every 2 weeks, so if a new employee is hired at a recognized level, PD Express will catch the update upon the next FPPS refresh.

User Account Maintenance

PD Express is synchronized with the FWS Active Directory and automatically sets up user accounts for Managers, Teams Leads or Supervisors in FPPS (PD Developer or Supervisor roles). Additionally, Administrators are able to **activate**, **modify** and **inactivate** user accounts manually within their administrator access. These types of updates can be expected on an ad hoc basis and should be few in number.

Activate a New User Account

While PD Express automatically sets up accounts based on users in FPPS and Active Directory, there may be a need to manually set up a new user. An example of this situation is when a new employee needs access to PD Express but FPPS upload is not scheduled for the immediate future. To activate a new user account, access the **Add New User** button.



Search by **Last Name**, **First name** or **Email address** and you will be presented a drop-down menu to select the **User**, assign a **Role** and properly assign a **Region**. Next, select the **Add New User** button and your user is created in *Active* status.

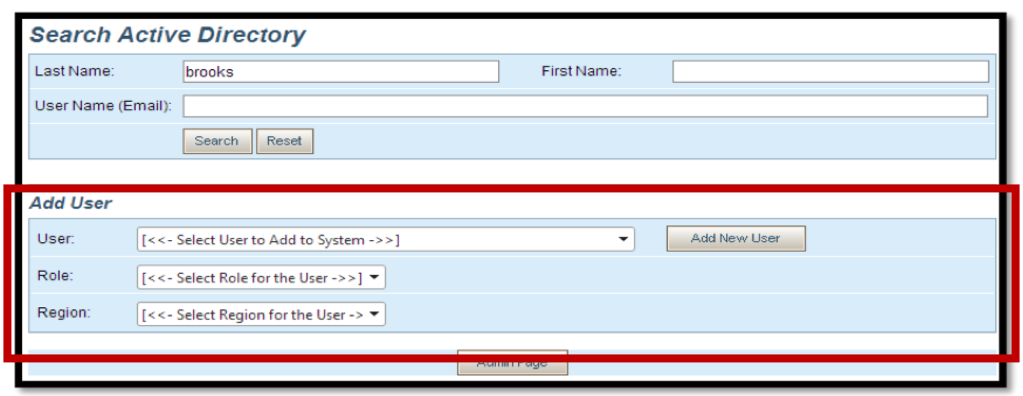
Remember this search is checking the FWS Active Directory.

HELP

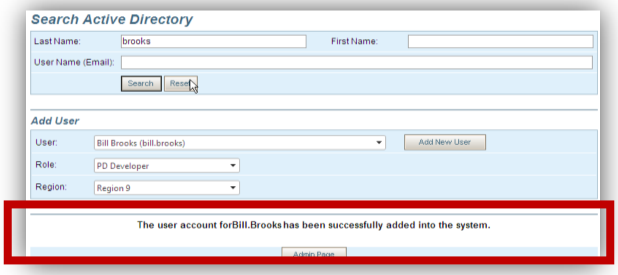
Role and Region Assignment

Only Global Admins have access to select /assign the Global Administrator role.

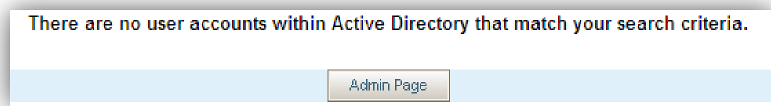
Regional Admins have ability to select/assign within their assigned Region only.



To successfully add a new user to PD Express, select all appropriate fields, click **Add New User**, and you will receive a confirmation message that the user is added!

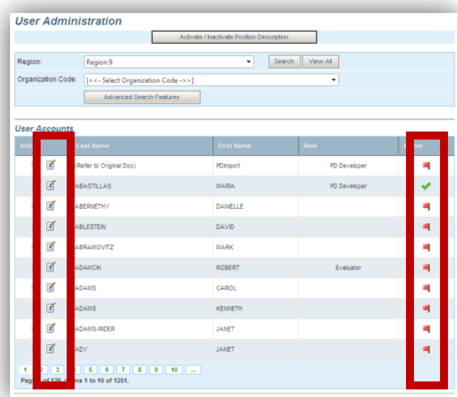


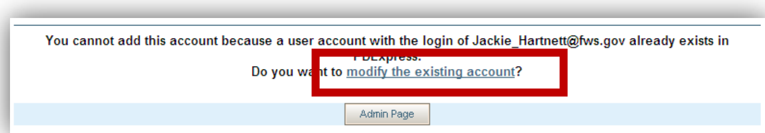
If a user is not in the FWS Active Directory, you will receive an error message.



It is important to note PD Express will not know when resources should be assigned an HR role or Administrator role. In these cases, an Administrator will need to ***manually assign roles.***

To begin manual assignment, search for the user from the **User Administration** page and select to modify through either the **edit icon** or via the link in **Search** findings (notice the **red flag** icon on far right… this indicates *Inactive* users):





Adding the user to PD Express and assigning **Role** and **Region** is the first step. In order for a user to perform tasks such as creating and editing a PD, an **Organization Code** must also be assigned. Learn more about adding these in the **Modify a User Account** section of this training.

HELP

Adding HR Resources

PD Express automatically adds new users based on the FPPS data feed.

HR and Admin resources, however, will need to be **manually setup** as the tool is unable to determine the proper role to assign to these resource types.

HANDS ON…

Goal:

Activate a User Account

You will need to activate an account for a PD Express user not yet activated

Record this User Name as **Reference J** on your Activity Reference Sheet.

Challenge Question:

Does this newly added user now have full functionality in PD Express?

Activity 1 – Activate a New User Account

Upon completion of this activity you will have successfully demonstrated how to activate a new user in PD Express.

1. Log in to PD Express and click **Admin** on header or footer
2. On User Administration screen, select **Advanced Search Features**
3. Type in last name **Smith**
4. Click **Search**
5. Locate a user who is currently *Inactive* and select the **edit icon**
6. On "Edit User Details for…" screen, verify user information and status is currently set to *Inactive*
7. Choose **PD Developer** from the **Assigned Role** drop-down menu
8. Select **Active** radio button as status
9. Record this user name as **Reference J** on your Activity Sheet
10. Click **Save User** to save your changes and activate this user
11. Navigate back to the **Admin** screen
12. Click **Advanced Search Features** and search for the user you just updated verifying activation

Congratulations! You have successfully activated a new user in PD Express.

Answer to Challenge Question:

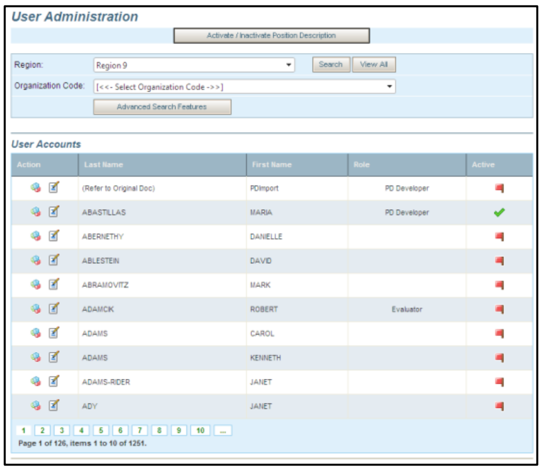
The user does not yet have full access! The user must first be assigned an **Organization Code.**

Modify a User Account

Sometimes a user's role or region may need updating, a user may need to be marked *Inactive* or a user may require access to different/additional **Organization Codes** in PD Express. For these reasons, Admin roles can modify user account settings.

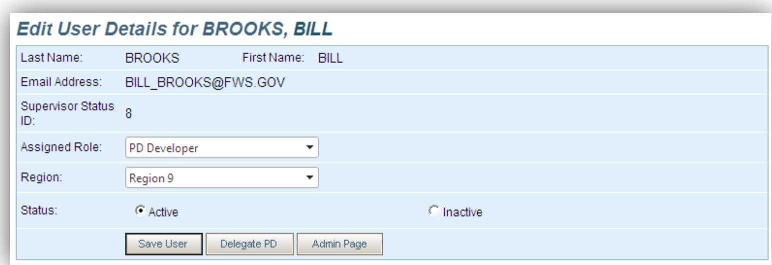
To get started, select **Advanced Search Features** and look for the user by name.

The **User Accounts** results screen has several columns, let's review this screen:



:

- **Action**: Allows selection of the **edit** or **delegate PD icon**
- **Last Name / First Name**: Indicates the first and last name of user
- **Role**: Shows what role the specific user is currently assigned
- **Active**: Indicates if a user is *Active* or *Inactive* in PD Express



Select the **edit icon** to display details of the user account you wish to modify.

Edit **Assigned Role**, **Region** (with appropriate access), and **Status**. Selecting *Inactive* will cut off the user's access to PD Express, but will not delete the user from the tool. Therefore, a user account can be reactivated if necessary. The user's Name, Email Address and Supervisory Status ID cannot be edited as that information is synchronized with Active Directory.

HELP

Reactivate a User…

Inactivating a user **does not** delete them from PD Express. Should it be necessary, you can search for the user again and activate the account by changing the user account status to *Active*.

ON TRACK…

Inactivation Restriction

A user account with PDs in *Draft*, *Review*, *Revise* or *Final Review* status **cannot be inactivated**.

Please work with the user to complete all active PDs and/or delegate PDs to an eligible user account.

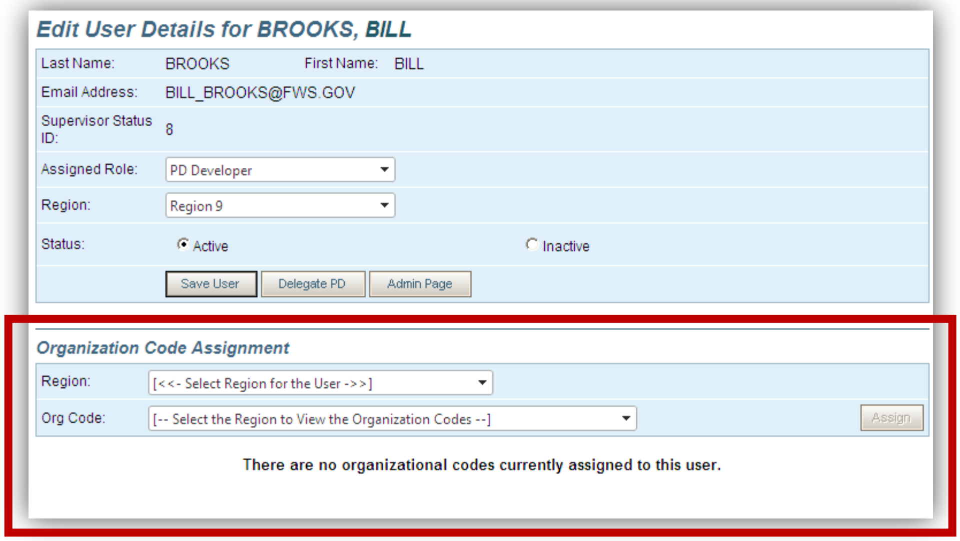
Adding Organization Codes

> **HELP**
>
> **Access to Org Codes**
>
> Regional Administrators can select/assign organization codes within the assigned Region only.
>
> Global Administrators have rights to select/assign organization codes throughout the entire Service.

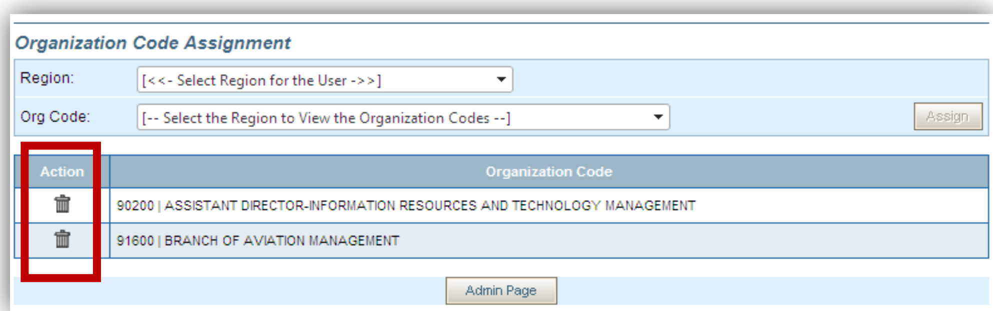
An **Organization Code** is the key to user access within PD Express. Organization Codes drive access to **create**, **edit** and **view** a PD. PD delegation is also dependent upon **Organization Code**. You'll want to ensure users are assigned the appropriate **Organization Code(s)** for their Program area.

PD Express will automatically assign **Organization Codes** based upon FPPS org code when the account is first created. PD Express will add additional codes to the user if the FPPS data changes, but removal of invalid **Organization Codes** are a manual process request to the Regional Administrator.

To add an **Organization Code** to a user, select the **Region** and **Org Code** and click **Assign**. Repeat this process until the user has access to all necessary codes.



To remove an **Organization Code** from a user's account, select the **delete icon** found in the **Action** column.



Activity 2 – Modify a User Account

Upon completion of this 3-part activity you will have demonstrated ability to modify user account **Role**, **Organization Code** and **Status**.

Part 1 - Search for a User and update Role:

1. Click **Advanced Search Features**
2. Enter **Reference J** as the user **Last Name and/or First Name**
3. Click **Search**
4. Scroll to the user you wish to modify and select the **edit icon** from the **Action** section
5. Change the **Assigned Role** to "Supervisor"
6. Verify **Status** *Active* is selected
7. Click **Save User**

Part 2 - Add Organization Codes:

8. Verify and select a **Region** to which organization codes should be assigned noting the following:
   - PD Developer roles should have access to specific **organization codes** within the assigned Region
   - Regional Admin and HR roles should have access to all **organization codes** within the assigned Region
   - Global Admin role should have access to all **organization codes** across FWS
9. Select **Organization Code** "#####" (locate a valid code)
10. Click **Assign**
11. Repeat steps 8-10 adding "#####" to the user (locate a valid code)
12. Click **Save User**

Part 3 - Inactivate a User:

13. Click **Admin** and search and select the user again
14. Verify information updated in part A and B of this activity
15. Mark **Status** as *Inactive*
16. Click **Save User**

You have just successfully modified and inactivated a user account!

HANDS ON...

Goals:

Search for User

Change the assigned role to Supervisor and verify **Status** is *Active*

Add Org Codes

Assign 2 Organization Codes

Inactivate/Reactivate a User

Inactivate user

Use **Reference J** from your Activity Reference Sheet to complete this activity.

ON TRACK…

Delegating a PD

Users assigned a role of PD Developer, Supervisor, HR Classifier, or HR Evaluator **do not have rights to delegate**.

Users without delegation rights are directed to log a request to the Regional Administrator to delegate PDs.

PD Delegation

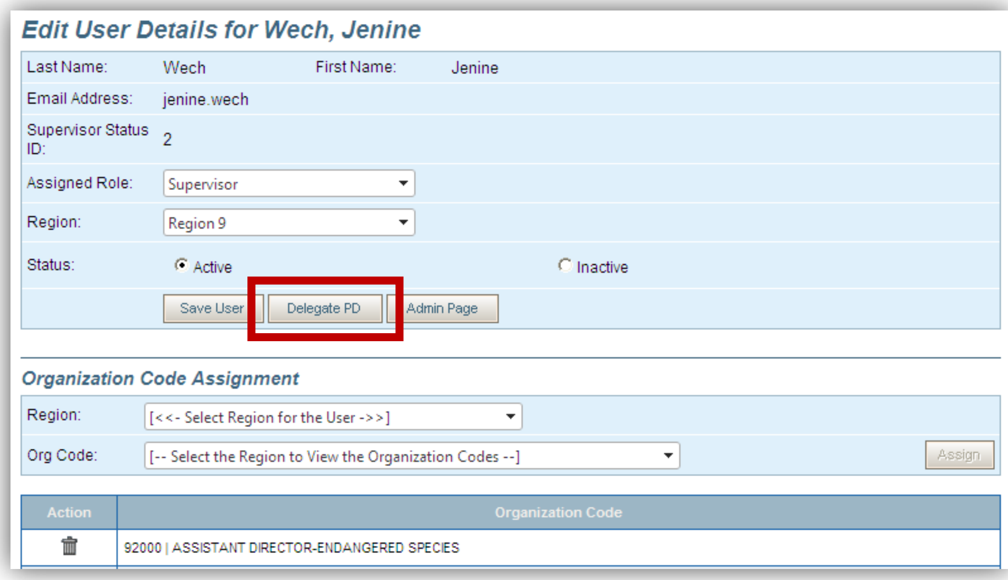
Sometimes users take time off or are unable to get to their PDs in the time allotted by the PD Express automated workflow schedule. To compliment workflow functionality and keep PDs on track, PD Express includes a delegation component. Regional and Global Admin roles have the ability to **delegate a PD** to any active user with a role allowing PD creation.

Delegation is dependent on user **Role, Region** and **Organization Code** of the PD being delegated.

Criteria for PD Delegation

When delegating a PD, be sure to have the following information on-hand about the PD to be delegated:

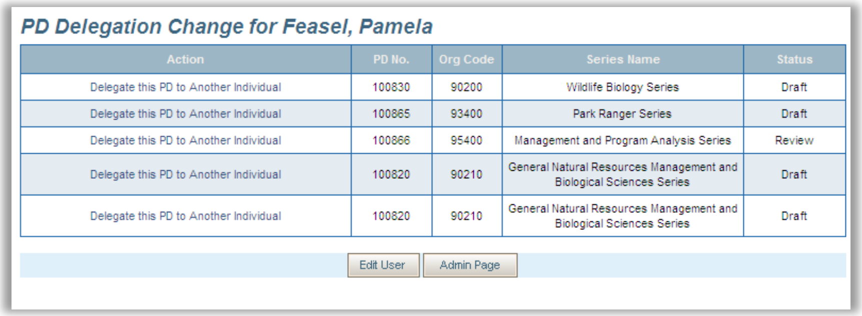
- Name of the current **PD Creator**
- **PD number** (**PD No.**) and **Organization Code**
- Active user, with matching **Organization Code**, to whom the PD will be delegated



To get started, search for the current PD Creator from the Admin screen and either click the **delegate icon** or select **Delegate PD** from the User Details screen.

PD Delegation Screen

The PD Delegation Screen lists all the PDs currently owned by a user. Let's explore this screen:



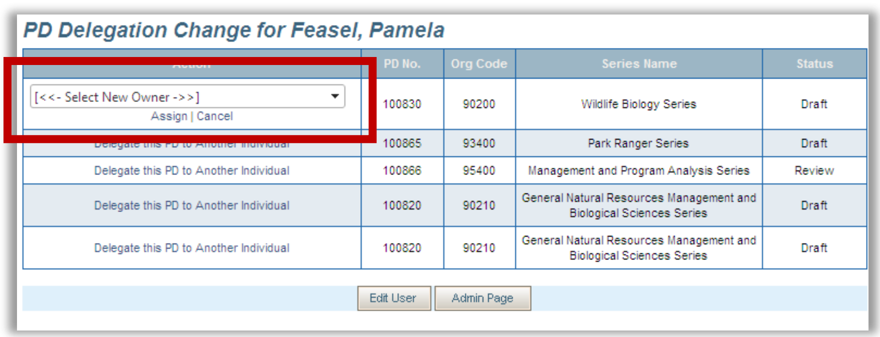
PD Delegation Change for Feasel, Pamela

Action	PD No.	Org Code	Series Name	Status
Delegate this PD to Another Individual	100830	90200	Wildlife Biology Series	Draft
Delegate this PD to Another Individual	100865	93400	Park Ranger Series	Draft
Delegate this PD to Another Individual	100866	95400	Management and Program Analysis Series	Review
Delegate this PD to Another Individual	100820	90210	General Natural Resources Management and Biological Sciences Series	Draft
Delegate this PD to Another Individual	100820	90210	General Natural Resources Management and Biological Sciences Series	Draft

Edit User | Admin Page

- **Action:** Allows you to delegate the PD to an active PD Express user
- **PD No.:** The unique, PD Express generated number for the PD
- **Org Code:** Displays the organization code of the PD (remember Delegate users must have access to the same code as the current PD Owner)
- **Series Name:** Shows the Job Series of the PD, for reference
- **Status:** Indicates the current status of the PD

Select **Delegate this PD to Another Individual** to select the delegate from a drop-down menu list of users.



PD Delegation Change for Feasel, Pamela

Action	PD No.	Org Code	Series Name	Status
[<<- Select New Owner ->>] Assign | Cancel	100830	90200	Wildlife Biology Series	Draft
Delegate this PD to Another Individual	100865	93400	Park Ranger Series	Draft
Delegate this PD to Another Individual	100866	95400	Management and Program Analysis Series	Review
Delegate this PD to Another Individual	100820	90210	General Natural Resources Management and Biological Sciences Series	Draft
Delegate this PD to Another Individual	100820	90210	General Natural Resources Management and Biological Sciences Series	Draft

Edit User | Admin Page

Once the user has been selected from the list, click **Assign** to apply the delegation. Immediately, the PD is removed from previous owner's PD list.

The delegated PD is now listed on the PD list of the new delegate to user who not only owns the PD, but is *listed as the creator* of the PD.

HELP

Drop-down Action Menu

The options in the **Select New Owner** list automatically populate the names of active users eligible to access to the PD.

The list is populated based on a user's assigned **Role**, **Region** and **Organization Code** matching the PD being delegated.

HANDS ON…

Goal:

Delegate a PD

Practice how to delegate a PD to a new owner

Use **Reference C & K** from your Activity Reference Sheet to complete this activity.

Challenge Question

In this activity, you are able to delegate your own PD. Can a Hiring Manager delegate his own PD?

Activity 3 – Delegating a PD

In this activity you will delegate a PD to a new owner and confirm delegation was successful.

Delegate a PD:

1. On top-level **Admin** screen, search for PD Creator by **Last Name (you)**
2. Scroll to the PD Creator (**Created By**) and click the **Delegate PD icon**
3. On the PD Delegation Change page, scroll to **find the PD No. to delegate** (Reference C)
4. Click **Delegate this PD to Another Individual**
5. Select the **New Owner** to delegate the PD to from the drop-down menu (note the name of this new owner as **Reference K** on your Activity Sheet)
6. Click **Assign**

Verify PD was delegated properly:

7. On top-level Admin page, search for the **new PD Creator Last Name**
8. Scroll to the new PD Creator (**Created By**) and click the **Delegate PD icon**
9. On the PD Delegation Change page, scroll to **find the delegated PD,** verifying it now appears in Reference K user's list of active PDs

Answer to Challenge Question

You are able to delegate your own PD because you are an Administrator. A Hiring Manager with PD Developer or Supervisor access would *not* have authorization to delegate a PD; not even those created or owned by that Hiring Manager.

PD Status: Active and Inactive

Regional and Global Admin roles are authorized within PD Express to change the status of a PD. An *Inactive* PD is not deleted from PD Express; instead, it is stored in the tool should it need to be reactivated for any reason.

Scenarios for PD Activation:

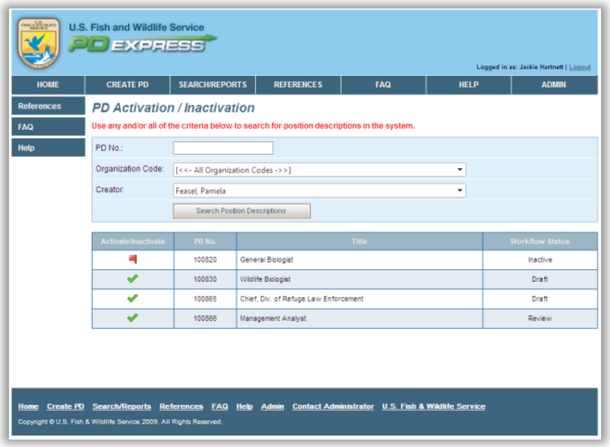
- A PD was set to *Inactive* and is now ready to staff

Scenarios for PD Inactivation:

- The position is determined obsolete and should be hidden from view to prevent creation of other PDs based off the obsolete PDs

General housekeeping of unwanted PDs: It is best practice to inactivate PDs no longer needed or wanted to avoid clutter and confusion in the PD Express Library.

To get started, select **Activate/Inactivate Position Description** on the Admin screen and let's explore the **PD Activation/Inactivation** screen:



ON TRACK…

Search Tip

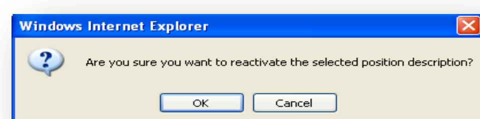
PD Express *does not* currently track the original creator of a delegated PD. Instead, the delegate's name is placed as the PD Creator.

When searching for PD to activate or inactivate, search for the delegated owner's name rather than the original creator's name.

Inactive PDs can only be searched from the Admin menu!

- **PD No.:** search by unique, PD Express generated PD number
- **Organization Code:** apply filter to search for a PD by code
- **Creator:** apply filter to search for a PD by user
- **Search Position Descriptions:** select to show search results
- **Activate/Inactivate column:** status icons are the same as on the User Accounts section of PD Express training where indicates *Active* and indicates *Inactive*

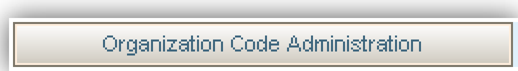
To **activate** or **inactivate**, click on the status icon in the left column. You'll receive a pop-up window confirming the action, select **OK** and the PD is updated!



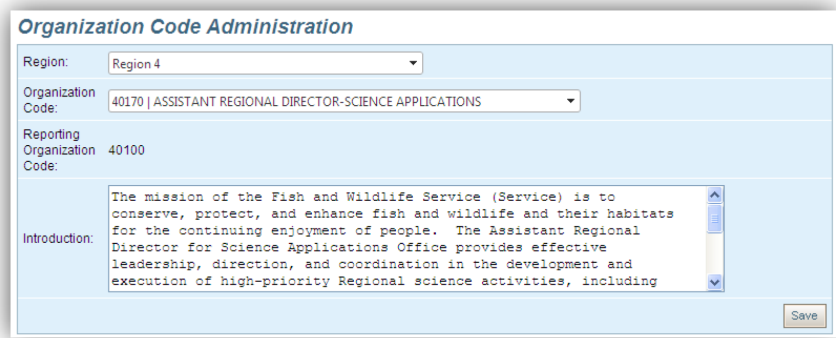
Updating Organization Introduction Statements

Introduction Statements for individual Organization Codes can be updated within the Admin functionality. Updates to **Introduction Statements** are "real time" and are available for users creating new PDs, once the statement is saved. NOTE: updates to Introduction Statements will not appear on In Progress PDs unless the organization code is updated.

To get started, click **Organization Code Administration.**



Once on the **Organization Code Administration** screen, simply select the **Region** and **Organization Code** to update and view the existing **Introduction** text.



Update the **Introduction** text field directly and click **Save** to ensure the Introduction Statement is updated. Any PDs created within that Organization Code will now show the updated Introduction Statement as default text.

HANDS ON…

Goal:

Inactivate a PD

Change an *Active* PD to *Inactive* in PD Express

Use **Reference C** from your Activity Sheet to complete this activity.

Challenge Question:

Is it true that if you inactivate a PD by mistake, it is gone from the system and must be re-created?

Activity 4 – Inactivate a PD

Upon completion of this activity you will have successfully demonstrated how to inactivate a PD in PD Express. Use the PD from Reference E on your Activity Reference Sheet.

1. Log in to PD Express and click **Activate/Inactivate Position Description** on the **Admin** screen
2. Enter the **PD No.** (Reference C) and/or **PD Creator** (you)
3. Click **Search Position Descriptions**
4. On the **Results** screen, click the **Active icon** to edit the PD
5. Click **OK** on the verification pop-up
6. Validate the presence of an **Inactive icon** in the Active/Inactive column

Congratulations! You have successfully inactivated a PD.

Answer to Challenge Question

No. PDs marked *Inactive* are stored in PD Express but do not display to a user. They are search able, but these PDs must reactivated by an Administrator to give full access.

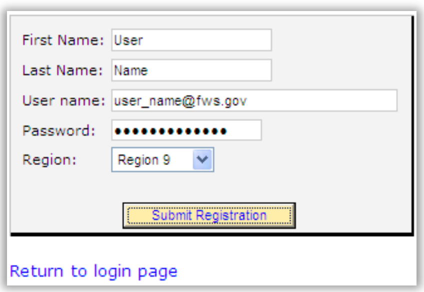
PD Express Issue Tracker for Administrators

To centralize and manage user requests to Regional and Global Admins, PD Express includes a link to the **Support Desk**. Once clicked from Training, this link opens up the Training **PD Express Issue Tracker**, also available at **https://pdexpress.fws.doi.net/trainingissuetracker/.** This tool allows users to log requests for administrative activities. Administrator access to requests is dependent upon Admin type and Region to which they are assigned.

Register to Use the Issue Tracker

This tool has a similar look and feel to PD Express, but users must register with their FWS email address before logging in. Click **Register** on the homepage to begin.

On the registration page, enter your **First Name, Last Name** and FWS email address as your **User Name.** Use your current **Active Directory password** and select your **Region**. Be sure to make your username and password the same you use for PD Express as you will receive a confirmation email to complete registration. Once information is entered, click **Submit Registration**.



The PD Express Issue Tracker will send a confirmation email to your username with a link to **complete registration**. Click to this link to be brought back to the **Issue Tracker** where you can now log in.

HELP

Issue Tracker Access

At the bottom of the PD Express tool users will see a link to the **Support Desk**. Clicking this link brings them to the PD Express Issue Tracker where they can log requests/issues.

Admins can access this tool via **Support Desk** or directly at https://pdexpress.fws.doi.net/issuetracker

ON TRACK…

Issue Tracker Login Info

PD Express Issue Tracker login information is not synched with PD Express, itself.

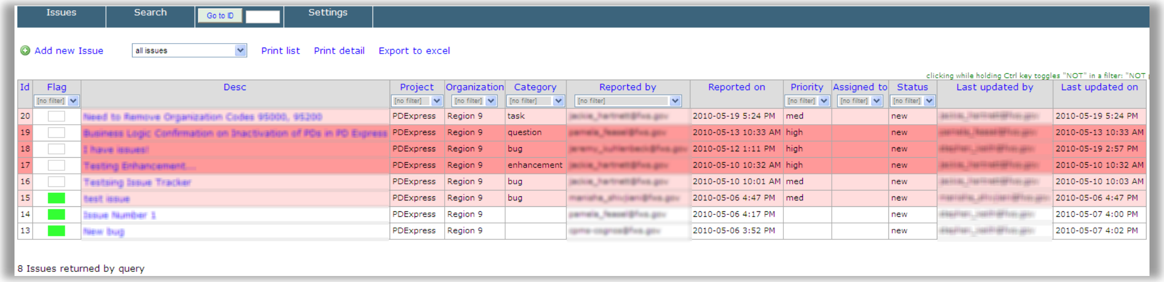
Ensure proper set up on the Issue Tracker by using your PD Express User Name and Password when registering.

Issue Tracker Password Synch

Use your current **Active Directory password** when setting up your Issue Tracker account and the Tracker will keep your password in synch with Active Directory.

Using the PD Express Issue Tracker

Administrators have access to view all issues in the tracker. Upon logging in, you will be brought to the **Issues** screen. Displayed here is a list of issues related to your search query. By default, this will be "All Issues" for Admins.



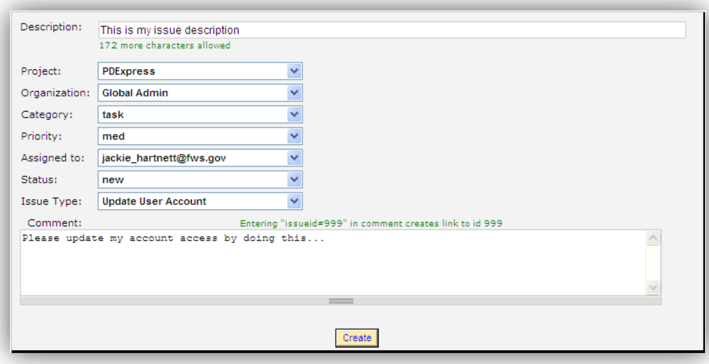
Notice there is color coding of issues by **Priority**. Let's explore this screen:

- **Add New Issue**: click this to add a new request/issue to the tracker
- **Filter Drop-down**: changes the view of issues currently shown on Issues screen
- **Print List**: allows users to print the list seen on the Issues screen
- **Print Detail**: enables users to print the details of requests/issues shown on Issues screen
- **Export to Excel**: Provides a Microsoft Excel version of Issues screen
- **ID**: unique identifier assigned to request/issue
- **Flag**: allows an Administrator to flag/unflag a request/issue for priority (flag color options include **red**, **green** or no color)
- **Desc**: shows the description of the request/issue input by the user
- **Project**: defaulted to PD Express, this field may be updated with any projects found in the Issue Tracker
- **Organization**: illustrates the Region of the PD Express user who reported the request/issue
- **Category**: indicates type of request/issue (Task, Enhancement, etc)
- **Reported by**: shows which user initially created the request/issue
- **Reported on**: indicates the date this request/issue was created
- **Priority**: specifies the priority of the request/issue and drives the highlighting of issue color on Issue screen (High = **dark pink**, Medium = **light pink** and Low or No Priority = no highlighting)
- **Assigned to**: shows which Admin user this request/issue is assigned to
- **Status**: illustrates status of the request/issue (New, In Progress, Closed)
- **Last Updated by**: shows which user last updated the request/issue
- **Last Updated on**: indicates the date this request/issue was last updated

Add a New Issue

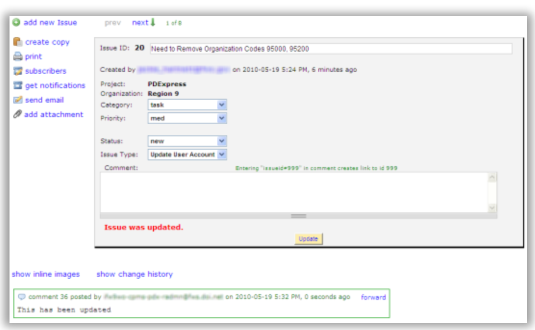
To log a request click the **Add a New Issue** link on the Issue screen. You will be brought to the create screen and must fill in the required fields: **Description**, **Project ID**, **Organization** (select the correct user Region), **Status**, **Issue Type** and **Comment**.

Include specific details in the **Comments** field. Feel free to fill in optional fields as you see fit, they include: **Category**, **Priority** and **Assigned to**. Once finished, click **Create** and you will be shown the request details including **Issue ID**.



Review and Update Issues

To **view** and **edit** an issue, click on the **Description** text link. Once opened, Admins have access to edit the **Category**, **Priority**, **Assigned to, Status** and **Issue Type** fields as well as add **Comments** to the issue explaining updates. Make any necessary changes and click **Update** to save.



Notice the above issue has been updated and a **Comment** added. PD Express Issue Tracker will notify users subscribed to this issue that a **Comment** has been posted and this request/issue updated.

From this update screen users can also **Create a Copy** of this request/issue as a new one, **Print** details of the request/issue, view users that currently **Subscribe** to updates, **Get Notifications** of updates (become a **Subscriber**), **Send Email** to any user referencing the request/issue and **Add Attachments** as needed.

ON TRACK…

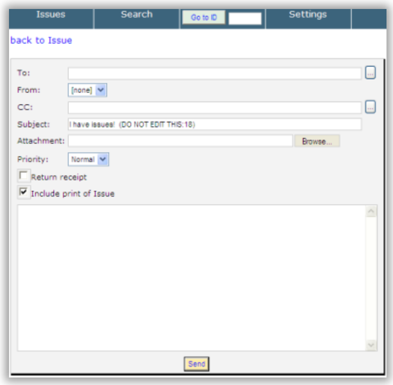
Assigned To!

It is best practice to update this field and assign the request to a Support Desk resource.

This way, there is a clear definition of who is working the issue.

If you are require additional information from the issue Creator, add yourself as a subscriber of this request/issue and send the user an email requesting they add the additional information directly in the issue.

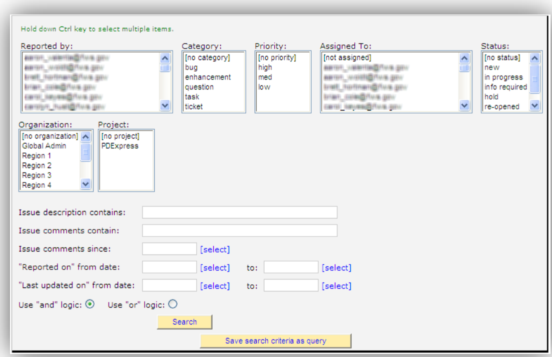
The **Send Email** screen is easy to use. Type the email address of your recipient into the **To** field, select your name as **From** and select to **Include Print** of **Issue**. Fill in the free-form text field and click **Send** and your email is on its way!



Searching the Issue Tracker

To search and locate a request/issue, click **Search** at the top of the webpage from any screen inside the Issue Tracker.

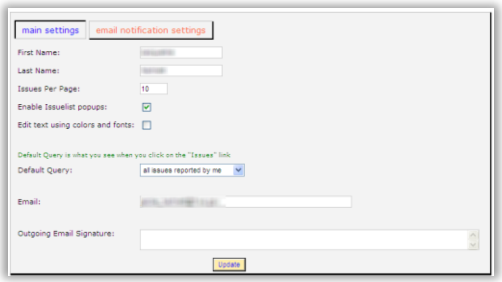
This will bring you to the **Search** screen where you look for requests/issues based on a number of filters: **Reported by, Category, Priority, Assigned To, Status, Organization (Region), Project** and more. Apply desired filters and click **Search**. Click **Save Search Criteria as Query** if this will be an ongoing search for you.

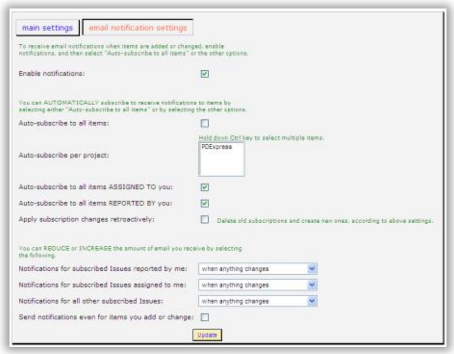


Issue Tracker Settings

To **edit** things like **Issues shown per Page**, **email addresses**, **notification settings** and more, access the **Settings** link from the top of the webpage on any screen.

From here you can choose to edit either **Main Settings** or **Email Notification** settings. Be sure to click **Update** once finished to ensure any changes are saved appropriately.





Remember that the **PD Express Issue Tracker** is accessible via the **Support Desk** link or website address, it is not directly synched with PD Express.

Administrators Only Functionality Highlights

As you've learned throughout training, PD Express has some activities available only to Administrators. Below is key functionality and rules only Admin users have access to:

- Access to PD Express Admin menu
- Edit access to maintain User Accounts
  - Activate
  - Modify
  - Inactivate
- Ability to Delegate a PD
- Functionality to Activate / Inactivate a PD
- Access to update default Introduction Statement text for Organization Codes
- Administrator access to PD Express Issue Tracker
  - View All Requests/Issues
  - Update Category, Priority, Assigned To, Status, Organization (Region) and Issue Type
  - Search Requests/Issue within the entire Service

HANDS ON…

Goal:

Use Search functionality

Save a Search query for future search criteria

Update a Request/Issue

Search for and update an issue

Sign Up to Get Notifications and Send email

Sign up to Get Notifications of an issue

Close an Issue

Activity 5 – Manage Requests in PD Express Issue Tracker

Refer to Getting Started module for information on registering and creating an issue. At the end of this activity, you will understand how to use the PD Express Issue Tracker as an Administrator.

Part 1 - Search for an Issue

1. Navigate to the Issue Tracker at **https://pdexpress.fws.doi.net/trainingissuetracker**
2. **Log in** with your Username and Password
3. Notice the Issues screen includes **all issues** logged in the Tracker
4. Click **Search**
5. Search for issues with **Category** = **Delegate PD** and **Status = New**
6. Click **Search**
7. Repeat steps 4-5 and click **Save Search Criteria as Query** to keep this as a future query search
8. Run **search** again

Part 2 - Update an Issue with a comment

9. Select the 1st issue and click the **Desc link** to edit
10. Update the **Status** to *In Progress* and select yourself as the **Assigned To**
11. Click **Update**

    ** At this point, you would log into PD Express and delegate the PD to a new user**

12. Add a comment stating "**This PD has been delegated to User John Smith**"
13. Click **Update**

Part 3 - Sign Up to Get Notifications on an Issue and Send an email

14. From left side menu, click **Get Notifications** to sign up to receive notifications when this issue is updated
15. From left side menu, click **Send email**
16. Enter your name into the **To** field (you can send email to anyone in the Service, but let's complete this activity with your own email so as to not distract other users)
17. Select a **From** resource
18. **Type a message** in the text box toward the bottom of the screen
19. Click **Send**

Part 4 - Close an Issue

20. Repeat Steps 1-6
21. Select the 1st issue and click the **Desc link** to edit
22. Update the Status to **Closed**
23. Click **Update**

Congratulations! You have successfully managed issues in the PD Express issue tracker!

Please refer to previous training modules for additional information on how to create, edit, review, revise and publish a Position Description (PD). Administrators have access to Hiring Manager and HR modules as well as Administrator functionality.

You have now concluded PD Express training for Administrators.