# **PEOPLE ADMIN USER GUIDE**



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# **Section 1: System Basics**

# System Basics - Accessing the PeopleAdmin Site and How to Log In

To access the PeopleAdmin 7 Recruitment and Position Management System, go to:

• https://jobs.ncat.edu/hr

<u>Bookmarking</u> the site will allow for quicker access to the log-in page. The login screen below will appear:

Enter your Username and Password here.	North Carolina Aget State University
	This system is optimized for the Google Chrome and Mozilla Firefox web browsers.
	Username
	Password
	Login
	First time here? Request an account
	Forgot your password? <u>Request a password reset</u>
Click here to request a new account or a	

Your username will be the part of your current NC A&T e-mail address that comes before "@ncat.edu." For example, if your e-mail address is **jdsmith@ncat.edu**, then your PeopleAdmin username will be: **jdsmith**.

If this is your first time logging in to PeopleAdmin, your password will be the same as your username. Using the above example, the password upon initial log in would match the username and also be: **jdsmith**. Once you click the Login button, you will then be prompted to reset your password to one of your choosing. Your password must meet the following criteria:

- Minimum length is 7 characters
- Must contain at least 3 of the following:
  - o A lowercase letter
  - o An uppercase letter
  - A numerical digit (1, 2, 3, 4, etc.)
  - Special character (#, \$, %, &, etc.)

## **Home Page Elements**

#### The PeopleAdmin Home page received a refreshed layout on July 17, 2018 for a new cleaner look.

#### What has changed?

#### **New Layout**

Things moved around a bit on the page, all are intuitive and easy to navigate. The most critical navigation change and less obvious is the Module Selector (switches between Applicant Tracking (now "Hire") and Position Management (now "Position"). To change modules you will select the three blue menu dots in the upper left corner of your PeopleAdmin screen.

Velcome to your Online Recruitment	and Position Manageme	ent System			Snortcuts
Alerts (1 alert from the administrator)					0 Active Applicants
TYPE MESSAGE					•••
description in the Position Description Management" (orange header) in the - select the "Positions Description" tab r instructions on the page for "modify a to "Home" and the appropriate positic follow the instructions provided on th Economic Development; > If you have Links section on the right side of this p	Module, If you have not yet at drop-down menu in the far upp next to "Home" and the approp n existing position"; > If this is a n type: SHRA or EHRA, and foll e page; > Post doctoral recruitn questions or need assistance p age.	one so, please by er right of your rlate position tyj i new position sy ow the instructio ent is initiated i please refer to th	egin by: > Selecting "P screen; > If this is an - pe: SHRA or EHRA, an elect the "Positions De ons on the page for " by contacting the Divi he user guide instructi	osition skisting position d follow the iscription" tab next reate New" and sion of Research and ons found in the	Evaluated Applicants Unevaluated Applicants
Inbox		Postings [	Hiring Proposals	Pending Requests	
SEARCH					2 Committees Served By Department last 365 Day
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TITLE			619		
TITLE Assistant Dean/Associate Professor Dean's Office - Library Services	Closed				
TITLE Assistant Dean/Associate Professor Deans Office - Library Services Dean of College of Science and Technology Provost/VC for Acad Aff	Closed		307		Provost/VC for Acad Aff

#### New feature – Graphical Data

PeopleAdmin has added graphical reporting on your home page illustrating useful data based on your user type.

#### **New Inbox**

You will be able to see all of your action items, including those assigned to you as a search committee member (under the postings tab). You will also notice a few added fields to help you better find and prioritize your work, including the department and days in current workflow state. When you click on an action item in your inbox, you will be logged in automatically with the correct user group.

#### **New Watchlist Functionality**

The Watchlist is getting a refresh with Search and Filter functionality, and a more convenient bookmark icon on each Posting, Hiring Proposal, etc. You can click on this at any time to add it or remove it from your watch list.

## **System Basics - Switching Between User Types**

There are some users who will be assigned multiple user types depending on their role in the organization, and these users have the ability to easily switch between their assigned user types. An example of this is a Dean who wants to switch from the Supervisor user type, which only allows them to view the position descriptions for their direct reports, to the Dean / Vice Chancellor user type, which will allow them to view the position descriptions all of the positions in their school or college.

You can switch between assigned user types at any time clicking on the drop down menu located on the top right corner of the page just above the grey bar:

	Hire		Welcome, Student 17	My Profile	Help logout (	Train-17)
	NORTH CAROLINA AGRICULTURAL AND TECHNICAL STATE UNIVERSITY			Jser Group: Department H	lead/Supervisor	
	Home Postings - Hiring Propo	osals 🔻			Shortcuts 👻	
		Click on the drop down menu here.	, <b></b> [	Supervisor	• ¢	logout
d P	osition Management System					

Then select the user type you want to switch to by clicking on that user type.

	Hire				Welcome, Student 17	My Profile	Help	logout	(Train-17)
	<b>A</b>	DRTH CAROLINA BRICULTURAL AND TECHNICAL ATE UNIVERSITY				User Group: Department	Head/St	pervisor	
	Home	Postings 👻	Hiring Pro	posals <del>-</del>			Short	cuts 👻	
and	Position	Management Sy	vstem	Linc Butler, Click on the Dean/Vice Chancellor user type.	you have 0 messages.	Supervisor Applicant Re Chancellor Class and Co Dean/Vice C Department Employee Human Reso Recruitment Supervisor	viewer omp hancello Head ources	r C	logout
					Shortcuts	Berlini Alleridi Galacia		_	
					Create New SPA Pos	ting			

When a request appears in your **Inbox** under the **Pending Requests** tab, you can access the request by clicking on the **Title**:

Displaying items for group "Department Head".				
Postings (10+) Hiring Proposals (0) Pending Re	equests (10+) Special Handling Lists	(0)		
Title	Туре	Current State	State Owner	
ick the title to access the request	New Position Description	Department Head	Department Head	
ick the title to access the request.	New Position Description	Department Head	Department Head	E
tee	New Position Description	Department Head	Department Head	
	New Desition Description	Department Head	Department Head	

You will then navigate to the **Position Action Summary** tab, from which you can review all information related to the request, including making any necessary changes by clicking **"Edit"** next to the section you want to make changes to, before approving the action and routing it to the next step in the approval workflow. You can also view the request's routing history and any comments submitted by previous users in the workflow by clicking on the **"History"** tab:

NORTH C	APOLINA							ibox	<b>People</b> Ad	min	
A&T STAT	E UNIVERSITY						Watch	List	APPLICANT	TRACKING	
		Home	Postings	Hiring Proposals	My Profile	Help					
							Linc Butler, you have 0 messages.	Depa	artment Head	• ¢	logout
Pending Requests Cl N C C C C C C C C C C C C C C D T C D T C D T C D T C D T C D T C D T C D T C D D D T C D D T C D D D T C D D D D	Pending Requests / / New Position Description / New Position definition / Summary         Click the "History" tab to view the request's routing history and any comments submitted by previous users in the workflow.         Position Type: EPA Section/Unit Huma Resources         Summary										
© F	Position Action Justification	Edit	Click "E make cl	dit" next to a nanges to.	ny sectio	n yoı	u want to				
	Justification of Need for New Position	Test Currently: blank									
	Pronosod Effective Date	08/01/2013									

Once the information in the request meets your approval, click the orange **"Take Action on Pending Request"** button in order to send the action to the next step in the approval workflow or to return the request to the initiator or previous approver:

	Linc Butler, you have 0 messages. Department Head 💽 C logout							
Pending Requests / / New Position Description / New Position definition / Summary								
New Position Description Communications (EPA). Current Status: Department Head         Position Type: EPA Section/Unit: Human Resources         Summary         History    Settings	Take Action On Pending Request •         WORKFLOW ACTIONS         Keep working on this Pending Request         Send to Dean/Vice Chancellor (move to Dean/Vice Chancellor)         Return to Supervisor (move to Supervisor)         Canceled (move to Canceled)							

## **System Basics - Using the Watch List**

Your **Watch List** appears at the bottom of your **Home Page**, enabling you to easily monitor and track requests you've initiated once they have been routed to the next steps in the approval workflow:

		Home Postings	Hiring Proposals   My Profile Help	
come to your Online Recruitment and Position Man	agement System			
2				
Alerts (2 sierts from the administrator)				
· · · · · · · · · · · · · · · · · · ·				
Jype Meccage				
Check the module name at top right (Applicant Tracking or Position M)	anagement) and change as needed to initiate a request or respond to cu	ment actions.		
Check your User Type just below header bar and change your role as	needed to initiate or respond to actions			
Information of the second s				
Inbox (30 Items need your attention)				
Inbox (30 items need your attention)				
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When routing an action to the next step in the approval workflow, you are given the option of adding the action to your Watch List prior to submitting on the **"Take Action"** box that appears:

	×	Take Action
		Send to Department Head (move to Department Head)
		Comments (optional)
an action to your Watch List you to easily track and or the action's progress.	2	Add this pending request to your watch list?
C	:I	Submit Cancel

Once an action is added is to your Watch List, you can view requests by type by clicking on the tabs at the top: **Postings, Hiring Proposals, and Pending Requests**. You can also quickly view information about each request in the list:

- Job Title: Indicates the title of the position related to the request.
- **Type:** Indicates the type of request by position type (EHRA, SHRA, or Post Doctoral).
- **Current State:** Indicates what step of the approval workflow the request is in.
- **State Owner**: Indicates the user that needs to take action on the request.

	L		
Postings (6) Hiring Proposals (0) Pending	Requests (33)		
Job Title	Туре	Current State	State Owner
Human Resources Specialist	SPA	Closed	Recruitment
Purchasing Specialist	SPA	Supervisor	Supervisor
EPA Position - 2	EPA	Supervisor	Supervisor
Staffing Services Manager	SPA	Supervisor	Supervisor
Human Resources Specialist	SPA	Human Resources	Recruitment

When a request appears in your **Watch List**, you can view the request by clicking on the **Job Title**. Unless the request is in a workflow state owned by you, you will not be able to take any action on the request:

ick the title to access the request. Requests (33)						
ot litle	Туре	Current State	State Owner			
luman Resources Specialist	SPA	Closed	Recruitment			
urchasing Specialist	SPA	Supervisor	Supervisor			
PA Position - 2	EPA	Supervisor	Supervisor			
taffing Services Manager	SPA	Supervisor	Supervisor			
uman Resources Specialist	SPA	Human Resources	Recruitment			

# **System Basics - Shortcuts and My Links**

	Inbax PeopleAdmin
Home Postings Hiring Proposals   My Profile Help	
	Lino Butler, you have 0 messages. Bupervisor 💌 C logout
The Shortcuts menu contains links for initiating requests such as creating a new posting and creating or modifying a position description.	Shortcuts Create New SPA Posting Create New FPA Posting Create New Fost Doctoral Posting
The My Links menu contains links to information about the system, training tools, and the user	My Links Useful Links
guide.	Training Videos (Go here for helpful videos for staff training on the use of PA7.) Your Applicant Potal (How Applicants access your PeopleAdmin system)
	PeopleAdmin MORAC - Customer Portal Login (best practice library, customer support portal, customer community)
Current State Owner Bupen/sor Bupen/sor Bupen/sor Bupen/sor	

# **Section 2: Position Management**

The Position Management module provides online access to position description information, and allows for managers and supervisors to initiate position and salary increase requests for permanent SHRA, EHRA, and Post Doc positions. The specific requests that can be initiated in the Position Management module are:

- Create New Position Description
- Modify Position Description

The only user types that can initiate a **Create New Position Description** or a **Modify Position Description** request are Supervisor, Department Head, and Dean/Vice Chancellor.

## **Create New Position Description - SHRA**

**IMPORTANT NOTE:** A budgeted available amount must be identified with a funding source **PRIOR TO** the initiation of a Create New Position Description request. Budgeted funds are subject to review and approval.

To initiate a **Create New Position Description** request for an SHRA position, first switch to the **Position Management** module using the drop down menu located in the top right corner of the

					Inbox	<b>People</b> Admin	
Home	Postings	Hiring Proposals	My Profile	Click on Position Management.	Watch List	APPLICANT TRACKING   POSITION MANAGEMENT	
				Linc Butler, you have 0	messages. Supe	ervisor 💌 C logou	t
						1	

Once in the **Position Management** module, make sure you have the necessary active user type. <u>Remember:</u> only Supervisor, Department Head, and Dean/Vice Chancellor user types can initiate a **Create New Position Description** request:

Home Position Descriptions Cla	ssifications   My Profile Help	Inbox         PeopleAdmin           Watch List         POSITION MANAGEMENT ▼
	First select the appropriate user type: Supervisor, Department Head, <u>or</u> Dean /Vice Chancellor.	Supervisor Cogout
ment and Position Management Syste	m	Then click on the Refresh button.

Next, hover your cursor over the Position Descriptions tab and click on "SHRA":

North Carolina A&T State University					Inbox	
					Walch List	T CONTON NO TO COMENT
Hover cursor over Position	lome	Position Descriptions Cla	ssifications	My Profile	Help	
Descriptions tab and click		SPA SPA Panding Paguasta			Linc Butler, you have 0 messages. Sup	pervisor 💌 C logout
on SHBA		FPA				
on shika.		EPA Pending Requests				
Welcome to your Online Recruitment a	nd Posi	Post Doctoral	1			
		Post Doctoral Pending Requests				12
					Shortcuts	

You will then be taken to the **Position Descriptions** view, which provides a list of all position descriptions based on your active user type as follows:

Active User Type	Positions in Position Descriptions List
Supervisor	Positions that are direct reports to the Supervisor only.
Department Head	All positions that report to the department the Department Head is assigned to.
Dean / Vice	All positions within the School, College, or Division the Dean / Vice Chancellor is
Chancellor	assigned to.

In the **Position Descriptions** view, you can search position descriptions by any number of criteria, including but not limited to position title, position number, employee name, supervisor name, or position status. Searches are fully customizable by position attributes, and you can save custom searches for use again later.

4	NORTH CAROLINA A&T STATE UNIVERSITY		Home Position Desc	criptions Classifications   My F	Puello Unia	(Inbox) Watch List	PeopleAdmin POSITION MANAGEMENT
Positio	n Descriptions / SPA PA Position Description	ns			Active user type is Supervisor.	Create New	ervisor 💽 C lo
	Open Saved Search ¥ Sear	rch:	Search More	e search options	Searches are customizab	le by	
Lis act	t of position de tive user type.	escriptions by	<u>fy an existing position</u> , select it from th	e list below by clicking on the worki	position attributes and c saved for later use.	an be	oyee name.
Lis act	t of position do tive user type.	escriptions by	$\underline{\mathbf{f}_{y}}$ an existing position, select it from the und)	e list below by clicking on the work Previous $f(2)(3)(4)$ Next $\rightarrow$	position attributes and c saved for later use.	an be	oyee name.
Lis	t of position de tive user type.	escriptions by	<u>Y an existing position</u> , select it from th und) Employee First Name	e list below by clicking on the work Previous 1 2 3 4 Next → Employee Last Name	position attributes and construction saved for later use.	an be status	Actions
Lis	t of position de tive user type.	escriptions by on Descriptions" (104 Items For Position Number 000016	<u>fy an existing position</u> , select it from the und) Employee First Name Tammie	e list below by clicking on the work Previous ∮234 Next→ Employee Last Name Hill	position attributes and conserved for later use.	an be status Active	Actions (Actions) Actions •
Lis	t of position de tive user type.	escriptions by on Descriptions" (104 Items Fo Position Number 000016 000018	<u>Y an existing position</u> , select it from the und) Employee First Name Tamnie Belinda	e list below by clicking on the work Previous f 2 3 4 Next → Employee Last Name Hill Mackin	Desition attributes and ca saved for later use.	Status Active Active	Actions (Actions) Actions ¥ Actions ¥
	t of position de tive user type.	escriptions by on Descriptions" (104 Items Fo Position Number 000016 000016 010000	ty an existing position, select it from the und) Employee First Name Tammie Belinda Ester	e list below by clicking on the work Previous f 2 3 4 Next → Employee Last Name Hill Mackin Jones	saved for later use.	Status Active Active Active	Actions (Actions) Actions y Actions y Actions y
	t of position de tive user type.	escriptions by on Descriptions" (104 Items Fo  Position Number  000016  000018  010000  000027	ty an existing position, select it from the und) Employee First Name Tammie Beinda Ester Linc	e list below by clicking on the work Previous 1 2 3 4 Next→ Employee Last Name Hill Mackin Jones Buter	Supervisor Human Resources Manager (Line Butler) Human Resources Manager (Line Butler) Human Resources Manager (Line Butler) Human Resources Specialist (Amy Braun)	An be	Actions (Actions) Actions v Actions v Actions v Actions v
	t of position de tive user type.	escriptions by on Descriptions" (104 Items For O00016 000016 000016 000027 000037	<u>Y an existing position</u> , select it from the und) Employee First Name Tamnie Belinda Ester Lino Rozolene	e list below by clicking on the work Previous 7 2 3 4 Next → Employee Last Name Hill Mackin Jones Butter Feimster	Desition attributes and cases and for later use.	An be Status Active Active Active Active Active	Actions Actions (Actions) Actions Acti

To initiate the request, click on the orange **Create New Position Description** button located on the top right of the screen just below the grey bar:

					Watch	List	PeopleAdr POSITION M	nin Ianagemei	VT V
Home	Position Descriptions	Classifications	My Profile	Help					
				Linc Butler	r, you have 0 messages.	Supe	ervisor	• C	logout
		Click here to	initiate the r	equest.	Сгеа	te New	Position Desc	cription	
		Search	Hide search options						

You will then click on "New Position Description" as the pending request you would like to start:



Enter the data fields for the **New Position Description** as follows; then click the orange **"Start Pending Request"** button located on the top right corner of the page:

North Carolina				Inbox	PeopleAdmin
A&T STATE UNIVERSITY				Watch List	POSITION MANAGEMENT V
Hom	e Position Descriptions	Classifications   My Profile H	elp		
		I	Linc Butler, yo	u have 0 messages. Supe	ervisor 💌 C logout
Position Descriptions / SPA / New Position Description					
New Position Description	4. Once all data click Start Pendi	fields are filled in, ng Request.	]	Start Pending Request	Cancel
Working Position Title Organizational Unit			1. En the p	ter the Worki osition.	ng Title of
Department * Section/Unit *		- 3. Select the		2. Select th to which th	e department ne position is
Clone an existing Position Description?		Section/Unit to which the positio assigned from th drop down list.	on is e	down list.	om tne drop

## SHRA Create New - Edit Pending Request Page - General Navigation

After clicking on the "Start Pending Request" button, you will then be taken to the Position Action Justification tab, the first information tab that must be completed before the Position Description can be sent to the next step in the approval workflow. Each information tab is listed on the Edit Pending Request page in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while all other tabs will appear as blue links.

You can save the changes you've made to the active tab you're working on and navigate to the next tab in the list simultaneously by clicking the Next> button located in both the top and bottom right corners of the page. You can save the active tab you're working on and stay on the same tab by clicking the "**Save**" button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column; however, this action **WILL NOT** save any changes made to the tab you are navigating away from.

Required fields are highlighted in **red** and must be filled in before the Position Description can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check Circle** also appears next to tabs that do not contain any required fields.

Tab list	Home Position Descriptions Classifications   My Profile Help	
	Linc Butler, you have 0 messages. Supervisor	logou
Pending Requests / / New Position Desc	vription / / Edit	
Editing Pending Request	Position Action Justification Save and Next buttons.	
Position Action Justif	Mr Charle and ling I	
SPA Classification		
SPA Position Details	Explain the business need for this position. The proposed effective date must be a future date, subject to change for payroll entry. The requested salary, if entered, must reflect a budgeted available amount to be identified with a funding source and is subject to DHR and budget review and approval.	
Position Funding Infor	* Required Information	
Add ADA Checklist Form	Position Action Justification	
<ul> <li>Supplemental Documents</li> <li>Supervisor</li> </ul>		
Pending Request Summary	Justification of Need for New Position     This field is required     Required fields	٦
Blue Check	Proposed Effective Date     This field is required.     highlighted in RED.	
Circle	Requested Salary	┛
	Position Request Number Save" and "Next>>" buttons.	

#### SHRA Create New - Saving to Return to a Pending Request Later

Also on the Editing Pending Request Tab List is an important menu item which should be selected if you need to stop a work session on the position description before submitting it to the next level for approval. Following this step will ensure that all your work is saved when you open the request for completion.

- 1) Click the "Save" button located in either the top or bottom right corner
- 2) Select "Pending Request Summary" from the Tab List (illustrated above)
- 3) Select "Keep Working on this Pending Request"

Pending Requests / / New Position Description / New Position definition / Summary  New Position Description: Administrative Support Associate (SPA) Edit Current Status: Draft  Keep working on this Pending Request Keep working on this Pending Request					Amy Braun, you have 0 messages.	Supervisor	→ C log
New Position Description: Administrative Support Associate (SPA) Edit Current Status: Draft	nding Requests / / New P	sition Description / New P	osition definition / Summar	1			
New Position Description: Administrative Support Associate (SPA) Edit Current Status: Drat Keep working on this Pending Recuest	N D iti	Descriptions Ad					
Current Status: Draft Keep working on this Pending Received and State St	Associate (S	A) Edit	ministrative Supp	οστ	VORKFLOW ACTIONS	Request v	
	Current Status: Draft				Keep working on this F	Pending	
Position Type: SPA Created by: Amy Braun Canceled (move to Canceled)		Crer	ated by: Amy Braun		Canceled (move to Car	nceled)	

4) Add any Comments into the window that opens (below) as notes to yourself, if desired

#### 5) Click "Submit"

		Take Action X	Amy Braun, you have 0 messages. S	upervisor 👻 C logo
Modify Position Descript	tion: Class & Comp	Keep working on this Pending	Take Action On Pending Rect WORKFLOW ACTIONS	jest 🕶
Current Status: Draft Position Type: SPA	Created by: Amy Braun	Comments (optional)	Keep working on this Pendi Request Canceled (move to Cancele	ng d)
Section/Unit: Classification & Compensation	Owner: Amy Braun		Send to Department Head ( Department Head)	move to
Summary History Settings		Add this pending request to your watch list?	Canceled (move to Cancele	u)
Position Action Justificat		Submit Cancel		

The **Pending Request** on this position description numbers can be located when you log into the Position Description module again as the same **User Type** you used to begin the action. Hover your cursor over the **Position Descriptions tab** and click on **"SHRA Pending Requests."** 

You will then return to the **Position Descriptions view**, which provides a list of all position descriptions based on your active user type, from which you can select this position number as before and continue.

## **SHRA Create New - Position Action Justification Tab**

Follow the instructions at the top of the page then click the Next>> button to save changes and navigate to the next tab:

Editing Pending Request	Position Action Justification Save Next>
Position Action Justif	* Check spalling
SPA Classification	
SPA Position Details	Explain the business need for this position. The proposed effective date must be a future date, subject to change for payroll entry. The requested salary, if entered must reflect a budgeted available amount to be identified with a funding source and is subject to DHR and budget review and approval.
Position Funding Infor	* Required Information
Add ADA Checklist Form	Position Action Justification
Supplemental Documents	
<ul> <li>Supervisor</li> </ul>	
Pending Request Summary	Justification of Need for New Position Why is a new position needed
Inding to support	✓ This field is required.
e request must be	Proposed Effective Date     This field is required.     Must be a future date
cured <u>PRIOR TO</u>	Requested Salary
itiation of the	Position Request Number
auact	

# SHRA Create New – Classification Tab

If you are not editing from an existing position, use **"Filter these results"** to search all position/classification (career band) titles by a key word. Your Class/Comp analyst in DHR can assist you in choosing a career band with related competencies most closely matching your business need.

To view a classification summary, click on the "Actions" link next to the classification title you want to view and select '**View Classification**". To return from the summary, use the Back button located on the top left corner of your web browser. To **select** a classification and proceed with creating the position description, click on the **Radio Button** to the left of the classification title you want to select, then and click on the button located on both the top and bottom right-hand corners of the page.

Clicking on the "Position/Classification Title" will open the "View Classification" page in a new tab within

our web browser. After reviewing the classification summary information, you will need to close this tab in order to return to the **SHRA Classification** tab and your request in progress. **PLEASE NOTE:** Clicking on the red "X" on the top right corner of your web browser will <u>close</u> the web browser and **log you out** of the system.

You can navigate to the previous tab by clicking on the grey "<<Prev" button located between the Save and Next buttons on the top right-hand corner of the page:

Pending Requests / / New Position Dese	Home	Position Description	ns Classifications   M	y Profile Help	Navigate to the previous tab by clicking on the "< <prev" button.<="" th=""></prev">
Editing Pending Request	SPA Classification				Save <
Position Action Justif	If you are not editing from an exis	stina position, use "	Filter these results" to sear	ch all position/class	sification (career band) titles by a key word. Your Class/Comp
SPA Classification	analyst in DHR can assist you in	choosing a career	band with related competencie	es most closely ma	atching your business need.
SPA Position Details	To view a classification summary	, click on the arrow	to the right by "Actions" and s	elect View Classi	fication. Return from the summary using the Back arrow at top
Position Funding Infor	<ul> <li>left. To <u>select</u> a classification and of screen.</li> </ul>	d proceed with crea	ating the position, click on the I	button to the left o	of the title and select <b>Next&gt;&gt;</b> in the orange box at top or bottom
Add ADA Checklist Form	If in the process of viewing or ch	anging a job/classif	ication title you open the Class	sifications tab vo	but have opened a new window within the system and need to
<ul> <li>Supplemental Documents</li> </ul>	close the Classifications tab at	ter reviewing the in	formation. Closing this tab will	return you to the	Position Descriptions tab and your request in progress.
Supervisor	Classifications - Filter these re	sults	Search all SHR	A class titl	es by
Click the radio button next to the SHRA class	Saved Search: "Class	ifications" (93 Ite	clicking on "Filt	<b>ter these r</b> 3 4 Next	results" Classifications ③
title you want to	Position/Classification Title	Job Code	Classification Status	(Actions)	
select. then click	SPA Title - 1	23187	Approved	Actions	View an SHRA
	Test New Class	Job Code	Approved	Actions	classification summary by
Sav <mark>e an</mark> û	Accountant	10751	Approved	Actions	
	Accounting Manager	10752	Approved	Actions	clicking on "Actions".

# SHRA Create New – Position Details Tab

Follow the instructions at the top of the page, making sure to fill out all required fields highlighted in RED,

and then click the

tton to save changes and navigate to the next tab:

Editing Pending Request	SPA Position Details		Save << Prev Next >>
Position Action Justif	Mic Chook apolling		
SPA Classification			
SPA Position Details	Complete each field. Require	d fields must be completed to continue through the process.	
Position Funding Infor	* Required Information		
Add ADA Checklist Form	Contact Information		
Supplemental Documents	* Contact Name	This field is required.	Who should be contacted if there
Supervisor	* Contact Phone Number	This field is required.	who should be contacted if there
Pending Request Summary			are questions about the request?
	* Contact Email	This field is required.	
	Proxy (For Leave Reporting)	This field is required.	
	* Proxy Phone Number	This field is required	Who is the proxy for leave
	r toxy r none number	This liok is required.	reporting approvals?
	* Proxy Email	This field is required.	1 0 11
	SPA Classification Informa	tion	
	* Position/Classification Title	Human Resources Specialist	Select requested competency
	Job Code	11804	level from drop down list.
	Requested Competency	Please select 💌	

Position Overview		
Primary Purpose of Position	Deta and DHR	ailed information in the Position Overview Position Information sections assist the Class & Comp Analyst in performing an
	This field is required	d.
<ul> <li>Primary Function of Organizational Unit</li> </ul>	This field is required	The Organizational Unit information should include factors such as department size, (number of employees/students, programs,
Position Information		degrees offered, and operating or
* Working Position Title	This field is required.	grant budgets) which are helpful to
Building and Room No.	÷.	an analyst for determining a
Work Hours: From * [time] to [time] on [days of week]	This field is required.	position's scope.
* Hours per Week	This field is required.	
* Months per Year	Please select This field is required.	
* Appointment Type	Please select This field is required.	
If Time Limited, Appointment Length	If time limited, please indicate budget end date. If funded from more than one fund, indicate checked selected."	e earliest end date. This field cannot be left blank if the "Time Limited" field above is

# SHRA Create New - Position Details Tab – Competencies and Related Job Duties

The next section of the Position Details tab is used to build **current duties and responsibilities** into the position. It is the <u>most important section</u> of a position description request, but easily missed by first-time users. Please read and follow all instructions in this area to ensure that your position description request is not delayed by providing too little information about the job duties.

On an SHRA position **at least three of the competencies** required by the career band profile must be used to structure the position description and link the duties being performed to the classification/career band's functional competency areas. If desired and relevant, all of the listed competencies may be used.

After identifying the first competency area from the "Competencies" list relevant to the job, click on the key button, "Add Competencies and Related Job Duties Entry." A pull-down list of all SHRA competencies will allow you to select one from the list related to this career band. Type in duties and examples of assigned work relevant to that competency, and assign an approximate percentage of all work time spent on those duties. Repeat these steps at least three times to capture the most important duties assigned to the position, those on which the employee will be evaluated. Please Note: Each time the "Add Entry" button is clicked; you are taken back to the top of the Position Details Tab and will need to <u>scroll down</u> through the other sections again to see then location to add the new entry.

Competencies from Classification Competencies from Classification Use only the competence listed here. Using of the competence competencies Applied Knowledge – HR Pro Performance Competency Profile [link to OSP]	ired in the position to meet business needs. A specific gro re utilized in the development of a position description. najor job duties of the position related to at least three of the pgram and Organization, Customer Service, Communication – Verbal/Written, Information/Recu /Guide/CompWebSite/Profiles/HR%20Specialist%20Profile.pdf	up of competencies has been identified for each ne competencies required in the selected career ords Administration, Program Administration, Managing Work and
Competencies and Related Job Duties		
To enter the job duties, please click the "Add Com scroll back down to this section with each addit must equal 100% Unless job duties are described in three comp Add Competencies and Related Job Duties Entry	petencies and Related Job Duties Entry" button. Repeat for each com tion to enter a competency and add job duties. The total percentage of etency areas, the system will prevent submission of this request.	Click here to add competencies and related job duties - <u>3 entries are</u> <u>required.</u> 18

Competencies are knowle career band title. They mu	dge, skills, and abilities that are re ist be demonstrated on the job and	required in the position to meet business and are utilized in the development of a po	needs. A specific group of co sition description.	ompetencies has been ide	entified for each		
Using only those compe band.	tencies listed below, describe th	he major job duties of the position related	to at least three of the comp	petencies required in the	selected career		
Competencies	Applied Knowledge – HR Program and Or Performance	Organization, Customer Service, Communication – Vert	al/Written, Information/Records Admin	nistration, Program Administration	n, Managing Work and		
Competency Profile [link to OSP]	http://www.osp.state.nc.us/Guide/Com	npWebSite/Profiles/HR%20Specialist%20Profile.pr	I				
Competencies and Relate	ed Job Duties						
must equal 100%.	Section with each addition to ente	ter a competency and add job duties. The	e total percentage of time allo	ocated for all the tasks an	nd responsibilities		
scroll back down to this must equal 100% Unless job duties are de Competency	scribed in three competency an Please select	reas, the system will prevent submissi	on of this request.	Select comp	petency from	the drop down l	ist <u>.</u>
scroin back down to this must equal 100%. Unless job duties are de * Competency Describe the specific * job duties related to this competency	scribed in three competency an Please select	reas, the system will prevent submissi	on of this request.	Select comp	betency from	the drop down l	ist <u>.</u> etei
scroin back down to this must equal 100% Unless job duties are de Competency Describe the specific ' job duties related to this competency ' Percentage Of Time	section with each addition to end scribed in three competency an [Please select	reas, the system will prevent submissi	total percentage of time allo on of this request.	Select comp	betency from	the drop down l related to comp	ist <u>.</u> etei
scroin back down to this must equal 100% Unless job duties are de Competency Describe the specific bib duties refleted to this competency Percentage Of Time Remove Entry?	Scribed in three competency an Please select	reas, the system will prevent submissi	total percentage of time allo on of this request.	Select comp cribe specif	betency from ic job duties spent perfor	the drop down l related to compo ming duties desc	ist <u>.</u> eter

## SHRA Create New – Position Details – Compliance and

**Requirements** Completing the final position details fields identifies all required and

preferred qualifications.



## **SHRA Create New - Position Funding Information Tab**

In the Funding Source Details section of this tab, you will indicate the funding source(s) for this position. Click on the **Add Funding Source Details Entry** button to enter budget and other required codes. **Select "Save" after each entry. PLEASE NOTE:** The annual amount budgeted must equal the requested salary.

If you are unsure of what fund to use, the most up to date information may be found in **Banner Finance** on these forms:

1) FTVORGN- Provides a list of Org Codes

2) FTVFUND- Provides a list of Funds

3) FTVACCT- Provides a list of Accounts

These forms show listings of all active funds. For additional help, refer to the Banner Training Guide.

If the position has more than one funding source, click on the **Add Funding Source Details Entry** button and **"Save"** until all sources have been entered. **PLEASE NOTE:** Each time you add an additional entry, you will need to **scroll down below the last saved entry** to enter a new funding source. Once all funding sources have been added, click Next>>> to move to the next tab:

	Home	osition Descriptions	Classifications	My Profile	Help			
					Linc Butler, you have 0 messag	es. Supervisor	• ¢	logout
Pending Requests / / New Position Desc	ription / / Edit							
Editing Pending Request	Position Fundi	IMPORANT No after each fun	OTE: Remen ding source	nber to cl is entere	ick "Save" ed.	Save << Pre	ev Next >>	
Position Action Justif	* Required Information		•					
SPA Classification	Funding Source Detai	ils						
SPA Position Details	Indicate the funding so	surce(s) for this position	on Click on "Add E	unding Source	Details Entry" to enter budg	et and other requi	red codes	
Position Funding Infor	Select "SAVE" after ea	ach entry. Please note	that the annual an	nount budgeted	d must equal the requested s	alary.		
Add ADA Checklist Form	If the position has more	e than one funding so	urce, continue to s	elect "Add Fun	ding Source Details Entry" a	nd "Save" until all	sources ar	e
Supplemental Documents	entered. Each time you source. Click on Add E	u add an additional en Junding Source Detail	try, you will need t	o scroll down	below the last saved entry	to enter a new fu	nding nding	
Supervisor	funding sources.						ig malapio	
Pending Request Summary	Add Funding Source Deta	ails Entry	Click here the positio source, con funding so	to add a f on has mo ntinue to urces are	funding source. If ore than one fundi click here until all entered.	ng	Next >>	

If non-state, select funding source from drop down list.         Additional funding source information         If the select funding source from drop down list.         If source at landing source information         If the select funding source information. If you are not sure about fund/account/org numbers assigned to your department or the amount/type of funding available, refer to the Chart of Accounts or contact Budget and Planning. Submissions with incorrect information here will be returned to you and cause delays in reviewing and approving your request.         Program       Formet 3 digt number sees	State Appropriated Funding / Non-State Appropriated Funding	Please select	Select State or Non-State from drop down list.
Additional funding source information       ""the" selected above, designate source. Provide position number / funds are being brandemed from another position. Attach Budget Revision Form as Supplemental Document if necessary to text in the sense of the sense sense of the sense of the sense of the sens	If non-state, select source of funding:	Please select	If Non-State, select funding source from drop down list.
<ul> <li>bit bis position partially of Mit Minded on Mit Mit Mit Mit Mit Mit Mit Mit Mit Mit</li></ul>	Additional funding source information	If "Other" selected above, designate source. Provi funds.	ide position number if funds are being transferred from another position. Atlach Budget Revision Form as Supplemental Document if necessary to transfer
<ul> <li>Budget Code</li> <li>Fund</li> <li>Fund</li> <li>Format: 6 digt number sesses</li> <li>Org</li> <li>Account</li> <li>Program</li> <li>Date Funds End</li> <li>Percentage of FTE</li> <li>Remove Entry?</li> </ul>	Is this position partially or fully funded on ARRA stimulus monies?	¥	Enter or Revise funding source information. If you are
Org       Format: 5 digt number sesses         Account       Format: 5 digt number sesses         Account       Format: 5 digt number sesses         Program       Format: 3 digt number sesses         Date Funds End       Enter date funds end (if time-limited), annual amount, and percentage of FTE.         Remove Entry?	Budget Code	Please select	not sure about fund/account/org numbers assigned to your department or the amount/type of funding
Account       Format: 5 digt number #####         Program       Format: 5 digt number ####         Date Funds End       Enter date funds end (if time-limited), annual amount, and percentage of FTE.         Percentage of FTE       Enter date funds end percentage of FTE.	Org	Format: 5 digit number ######	available, refer to the Chart of Accounts or contact Budget and Planning. Submissions with incorrect
Program Format: 3 digt number ### Date Funds End Annual Amount Percentage of FTE Remove Entry?	Account	Format: 5 digit number #####	information here will be returned to you and cause delays in reviewing and approving your request.
Dute Funds End Enter date funds end (if time- Annual Amount Enter date funds end (if time- limited), annual amount, and percentage of FTE.	Program	Format: 3 digit number ###	
Annual Amount Iimited), annual amount, and percentage of FTE.	Date Funds End		Enter date funds end (if time-
Percentage of FTE percentage of FTE.	Annual Amount		limited), annual amount, and
Remove Entry?	Percentage of FTE		percentage of FTE.
	Remove Entry?		

### SHRA Create New - Add ADA Checklist Form Tab

The ADA checklist is used to determine the general physical requirements, physical activities, visual acuity, and working conditions of positions in order to be compliant with the provisions of the Americans with Disabilities Act of 1990.

e) Check each box that corresponds with the physical aspects of the essential functions of the position, then click "**Next>>**" to move to the next tab. All 4 fields are required and include:

- The physical activity of the position (Check all that apply and at least one)
- The physical requirements of the position (Select one from the drop down list)
- The visual activity requirements including color, depth perception, and field of vision (Check all that apply and at least one)
- The condition the worker will be subject to in the position (Check all that apply and at least on



## **SHRA Create New - Supplemental Documents Tab**

The Supplemental Documents Tab allows you to upload documents as attachments that will route with

the request through the approval workflow. Attachments can be uploaded as follows:

- **Upload New:** Choose this option if you want to upload a file from your computer.
- **Create New:** Choose this option if you want to create a new file to attach using the PeopleAdmin editor.
- **Choose Existing:** Choose this option if you want to attach a file that has already been uploaded into PeopleAdmin as part of another action.
- Add by URL (For Organizational Charts Only): Choose this option if you wish to link to a file on the web by its URL.

**The Organizational Chart is required.** Position requests will be returned to the Initiator if a current organizational chart is not attached. If a Budget Revision Form is needed to support the request, you can download it from the Budget and Planning Web Site (http://www.ncat.edu/research/documents/dored-documents/research-services-documents/budget-revise.xlsx), complete it, save it, and select "Upload New" as the option under Actions.

Excel and Word documents may be attached. PDF conversion must be completed for the document to be valid when applicable:

					Linc Butler, you have 0 messages.	Supervisor	• ¢
iding Requests / / New Position Desc	ription / / Edit						
Editing Pending Request	Supplemental Do	cuments				Save << Prev	Next >>
Position Action Justif	Organizational Chart in I	Doguizad Desition rag	oot will be returned	d to Initiator if o c	urrant are abart is not attached	If Rudget Revision Fer	- ia
SPA Classification	needed to support action	n, download it from the	Budget and Planni	ing Web Site (htt	p://www.ncat.edu/research/docur	ments/dored-	III IS
SPA Position Details	documents/research-ser	rvices-documents/budg	et-revise.xlsx), coi	mplete it, save it,	and select "Upload New" as the	option under Actions.	
Position Funding Infor	Excel and Word docume	ents may be attached.					
Add ADA Checklist Form	PDF conversion must be	e completed for the doo	ument to be valid v	when applicable.			
Supplemental Documents	Document Type M	Name Status (Action	s)				
Supervisor	Organizational Chart	Actions		Click "Act	tions", then select	Upload New	,
Pending Request Summary	Budget Revision Form	Upload New Create New		Create N	ew, Choose Existin	g, or Add by	
	Other Document	Choose Existing		URL in or	der to upload an a	ttachment.	
	1 Ost Doctoral Evaluation	Add by URL			-		
			-			Save << Prev	Next >>
				Complete t	his page by clicking		
				on Save an	d Next>>		

#### SHRA Create New - Supervisor Tab

The **Supervisor Tab** allows you to select the position to which your new position will report. If you are not editing from an existing position, use **"Filter these results"** to search all supervisors by a key word.

	Pending Requests / / New Position Des	scription	Home Pos	sition Description	ns Classification	ns   My Profile	Navigate to the pre clicking on the "<<1	evious Prev" k	tab by outton.
	Editing Pending Request	s	Supervisor				Sav	e << Prev	Next >>
	Position Action Justif		osition Descriptions - E	ilter these resu					
	SPA Classification	1'	Usition Descriptions - 1	inter these resu	sea	arch all posi	tion descriptions by		
	SPA Position Details				clic	king on "Fi	ter these results".	riptio	ns 🛛 🕲
	Position Funding Infor		Saved Search: ".	All Position De	scriptions" (104	Items Found)			
	Add ADA Checklist Form				. Provis		Novt		
	Supplemental Documents				← Flevic		Next →		
			Working Position Title	Position Number	Employee First Name	Employee Last Name	Supervisor	Status	(Actions)
ck t	he radio button	_	Staffing Services Manager	000016	Tammie	Hill	Human Resources Manager (Linc Butler)	Active	Actionsv
XTT	o the position		Administrative Support Spec	000018	Belinda	Macklin	Human Resources Manager (Linc Butler)	Active	Actions <b>▼</b>
oct	then click		Human Resources Specialist	010000	Ester	Jones	Human Resources Specialist (Amy Braun)	Active	Actions
ect.			Human Resources Manager	000027	Linc	Butler		Active	Action 22
AL.			Administrative Support Assoc	000037	Rozolene	Feimster	Business Officer (Jacob Teagle)	Active	Actions

To view one of the position descriptions in the list, click on the **"Actions"** link next to the classification title you want to view and select "**View**", or click on the **Working Position Title.** To return from the summary, use the Back button located on the top left corner of your web browser. To **select** a position description to which your new position will report and proceed with creating the position description, click on the **Radio Button** to the left of the position description you want to select, then and click the **Nextor** button.

**PLEASE NOTE:** The selection list of supervisors is dependent on **the POSITION TYPE (SHRA or EHRA)** being created. To select a supervisor in a <u>different</u> Position Type (for example EHRA supervising SHRA), click on "Filter these results" and select the <u>Position Type</u> to which the supervisor of the position belongs. Then click on

Editing Pending Request	Superviso	r		Save << Prev Next >>
Position Action Justif	The Supervise	or Tab allows you to select the positio	n to which your new position will report. If you are not ec	liting from an existing position use "Filt
Classification	these results	" to search all supervisors by a key w	ord.	and a chisting position, use The
Position Details	To select a po	sition description to which your new p	sition will report and proceed with creating the position	description, click on the Radio Button
Position Funding Infor	the left of the p	osition description you want to select,	then and click on the orange "Next>>" button located of	on both the top and bottom right-hand
Add ADA Checklist Form	corners of the	page.		
Supplemental Documenta	Selected Sup	ervisor		
Supervisor	) I	Search Position Descriptions	*	
Employee	-	Search Carton Descriptions		
Pending Request Summary		Post Doctoral Type: Add Column: EPA Post Doctoral Department: First Name:	Select EHRA as Position Ty under "Filter These Results a different supervisor need to be assigned	pe 5″ if ds
	Position Des	Last Name:		
			Search Cancel	Ad hoc Search

**REMEMBER:** The positions that appear in this list are also based on your active user type (Supervisor, Department Head, Dean / Vice Chancellor) and the organizational unit to which you are assigned.

## SHRA Create New - Pending Request Summary Tab

The **Pending Request Summary Tab** allows you to perform a final review all of the position information you've entered on the previous tabs prior to sending the request to the next step in the approval workflow. Please review the details of the position summary carefully before continuing.

The **Blue Circle Check** appears by those tabs for which all required information has been entered:

	Home	Position Descriptions	Classifications	My Profile	Help			
					Linc Butler, you have 0 messages.	Supervisor	▼ ¢	logout
Pending Requests / / New Position Description	n / New Position definiti	on / Summary						
New Position Descriptio Description (SPA) Edit Current Status: Draft	on: Unnamed Po	osition			Take Action On Pendi	ng Request 🔻		
Position Type: SPA Section/Unit: Compensation, Benefits & Position Management	Created by: Linc B Owner: Linc Butler	utler						
Summary History Setting	5							
Position Action Justification	tion <u>Edit</u>	Click "Ed	lit" to mal	ce edits	s to a tab.			
pr N	Additional worklo	oad in the area of classification creation of an additional posi	n and compesnation has tion.	•				
Blue Circle Check	Currently: blank							
Dat	08/01/2013							
Requested Salary	\$55,000							

An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save"**, and then return to the **Pending Request Summary Tab** by clicking on the link in the left column:

SPA     Con	A Position E	Details <b>E</b>	Click "Edit" to make edits to a tab.	]	
Orange C	ircle	: Name			
Exclamation	n Point	ne Number			
	Contac	t Email			
F	Proxy (For Lea	ave Reporting)			
	Proxy Pho	ne Number			

Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example, the appropriate routing action is **"Send to Department Head (Move to Department Head)"**:

North Carolina			Inbox	PeopleAdmin
A&T STATE UNIVERSITY			Watch List	POSITION MANAGEMENT V
	Home Position Descriptions	Classifications   My Profile	Help	
			Linc Butler, you have 0 messages. Sup	oervisor 💌 C logout
Pending Requests / / New Position Description / New Position Description: Unna Description (SPA) Edit         Current Status: Draft         Position Type: SPA         Section/Unit: Compensation, Benefits & Position Management         Summary         History         Settings	Click on "Take Acti Request", then sel Department Head request to the nex approval workflow	ion On Pending ect "Send to " to move the t step in the /.	Take Action On Pending Red WORKFLOW ACTIONS Keep working on this Pend Request Canceled (move to Cancel Send to Department Head Department Head) Canceled (move to Cancel	uest <b>•</b> ing ad) (move to ad)
Position Action Justification				

You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send the action to the next level in the approval workflow, click the **"Submit"** button:



If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation.

The physical activity of this possible	osition (Check all that apply and at least one)" is required and All required fields must be set before transitionin	g.
A&T STATE UNIVERSITY		Watch List
	Home Position Descriptions Classifications   My Profile Help	

Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

Pending Request was successfully transitioned, and it was added to your watch list	L.					
Age State University						
	Но	me	Position Descriptions	Classifications	My Profile	Help
Green confirmation bar indicating the Pending						
Request was successfully transitioned and						
added to your Watch List.						
New Position Description: test (SPA) Current Status: Department Head						

The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

#### **Create New Position Description - EHRA**

**IMPORTANT NOTE:** A budgeted available amount must be identified with a funding source **PRIOR TO** the initiation of a Create New Position Description request. Budgeted funds are subject to review and approval.

To initiate a **Create New Position Description** request for an EHRA position, first switch to the **Position Management** module using the drop down menu located in the top right corner of the

					Inbox	<b>People</b> Admin	
 Home	Postings	Hiring Proposals	My Profile	Click on Position Management.	Watch List	APPLICANT TRACKING POSITION MANAGEMENT	
				Linc Butler, you have 0	messages. Supe	ervisor 💌 C Io	ogout

Once in the **Position Management** module, make sure you have the necessary active user type. <u>Remember</u>: only Supervisor, Department Head, and Dean/Vice Chancellor user types can initiate a **Create New Position Description** request:

			Inbox         PeopleAdmin           Watch List         POSITION MANAGEMENT ▼
Home	Position Descriptions	Classifications   My Profile Help First select the appropriate user type: Supervisor, Department Head, or Dean /Vice Chancellor.	Supervisor C logout
ment and Pos	ition Management Sys	stem	Then click on the Refresh button.

Next, hover your cursor over the Position Descriptions tab and click on "EHRA":

North Carolina						Inbox	PeopleAdmin
A&T STATE UNIVERSITY						Watch List	POSITION MANAGEMENT V
		Home	Position Descriptions	Classifications	My Profile	Help	
		_	SPA			Linc Butler, you have 0 messages. Sup	ervisor 💌 C logout
			SPA Pending Requests				
Hover cursor over P	Position		EPA				
Descriptions tab an	d click		EPA Pending Requests				
on FHRA		d Posit	Post Doctoral	)			
			Post Doctoral Pending Reque	ests			

You will then be taken to the **Position Descriptions** view, which provides a list of all position descriptions based on your active user type as follows:

Active User Type Positions in Position Descriptions List						
Supervisor	Positions that are direct reports to the Supervisor only.					
Department Head	All positions that report to the department the Department Head is assigned to.					
Dean / Vice Chancellor	All positions within the School, College, or Division the Dean / Vice Chancellor is assigned to.					

In the **Position Descriptions** view, you can search position descriptions by any number of criteria, including but not limited to position title, position number, employee name, supervisor name, or position status. Searches are fully customizable by position attributes, and you can save custom searches for use again later.

森	NORTH CAROLINA A&T STATE UNIVERSITY			(inbox) People. Watch List Posmo	Admin N MANAGEMENT 🔻
		Home Posi	tion Descriptions Classifications   My Profile	Help	
Position I	Descriptions / EPA	ions	Acti Supe	ve user type is ervisor.	escription
List	Open Saved Search v S of position de veruser type	scriptions by To modify an existing p	Search More search options	Searches are customizable by position attributes and can be saved for later use.	er, or
Adh	oc Sea	Position Descriptions			Actions
	Working Position Title	Position Number	Department	Position/Classification Title	(Actions)
	EPA Position - 2	76767	Intercollegiste Athletics	Assoc Director of Athletics	Actions
	DHR EPA Position Test 1	12345	Student Affairs	Admissions Officer	Actionsv
	Director		Compensation, Benefits & Position Management	Director	
					Actions

To initiate the request, click on the orange **"Create New Position Description"** button located on the top right of the screen just below the grey bar:

					Watch	lbox List	PeopleAc POSITION	lmin Manageme	NT V
Home	Position Descriptions	Classifications	My Profile	Help					
				Linc Butler	, you have 0 messages.	Super	visor	▼ ¢	logout
		Click here to	initiate the r	equest.	Сгеа	te New I	Position De	scription	

You will then click on "New Position Description" as the pending request you would like to start:

ľ	Create New X	
	Choose the pending request you would like to start.	
	New Position Description Requested data must be entered into every required field, even if you choose to cancel an action you have started. To avoid loss of data, save each section and tab after you complete it in case you are interrupted before completion.	
tio	n above. To modify an existing position, select it from the list below by click	

Enter the data fields for the **New Position Description** as follows then click the orange **"Start Pending Request"** button located on the top right corner of the page:

North Carolina				Inbox	PeopleAdmin
A&T STATE UNIVERSITY				Watch List	POSITION MANAGEMENT
H	ome Position Descriptions C	lassifications   My Profile H	lelp		
			Linc Butler, y	ou have 0 messages. Supe	ervisor 💌 C I
sition Descriptions / EPA / New Position Description					
New Position Description	4. Once all data f click Start Pendir	ields are filled in, ng Request.	]	Start Pending Request	Cancel
Working Position Title			1. En the p	ter the Worki position.	ng Title of
Department *					
Section/Unit *		3. Select the Section/Unit to which the positic	on is	2. Select th to which th assigned fro down list.	e department le position is om the drop
erone an existing resident bescription:		assigned from th drop down list.	e	L	

## **EHRA Create New - Edit Pending Request Page - General Navigation**

After clicking on the "**Start Pending Request**" button, you will then be taken into the **Position Action Justification tab**, the first information tab that must be completed before the Position Description can be sent to the next step in the approval workflow. Each information tab is listed on the **Edit Pending Request** menu in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while all other tabs will appear as blue links.

You can save the changes you've made to the active tab you're working on and navigate to the next tab in the list simultaneously by clicking the Next> button located in both the top and bottom right corners of the page. You can save the active tab you're working on and stay on the same tab by clicking the "**Save**" button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column, however this action **WILL NOT** save any changes made to the tab you are navigating away from.

Required fields are highlighted in **red** and must be filled in before the Position Description can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The Blue Check Circle also appears next to tabs that do not contain any required fields.



#### **EHRA Create New - Saving to Return to a Pending Request Later**

Also on the **Editing Pending Request** Tab List is an important menu item which should be selected if you need to stop a work session on the position description before submitting it to the next level for approval. Following these steps will ensure that all your work is saved when you open the request for completion.

- 1) Click the "Save" button located in either the top or bottom right corner
- 2) Select "Pending Request Summary" from the Tab List (illustrated above)
- 3) Select "Keep Working on this Pending Request"



Add any **Comments** into the window that opens (illustrated below) as notes to yourself, if desired
 Click "Submit"

	Home Positi	on Descriptions	Classifications	My Profi	ie Heip
					Amy Braun, you have 0 messages. Supervisor
nding			_		
		Take Action		×	
	Modify Position Description: Assistant Direc (EPA) Edit	Keep working o Request	on this Pending	- 1	
	Current Status: Draft	Comments (option	al)		
	Position Type: EPA Created by: Amy Braun Section/Unit: Director Athletics Owner: Amy Braun	I			
	Summary History Settings				
		Add this pendi	ng request to your watch		
	Position Action Justification Edit				
			Submit Cance	1	
	Reason for Position				

The **Pending Request** on this position description numbers can be located when you log into the Position Description module again as the same **User Type** you used to begin the action. Hover your cursor over the **Position Descriptions tab** and click on "**EHRA Pending Requests**."

You will then return to the **Position Descriptions view**, which provides a list of all position descriptions based on your active user type, from which you can select this position number as before and continue.



# **EHRA Create New - Position Action Justification Tab**

Follow the instructions at the top of the page then click the the next tab:

button to save changes and navigate to



## **EHRA Create New - Classification Tab**

If you are not editing from an existing position, use "Filter these results" to search all EHRA titles by a key word.

To view a classification summary, click on the "Actions" link next to the classification title you want to view and select "**View Classification.**" To return from the summary, use the Back button located on the top left corner of your web browser. To **select** a classification and proceed with creating the position description, click on the **Radio Button** to the left of the classification title you want to select, then and click "**Save**" or the Nexted button located on both the top and bottom right-hand corners of the page. The Position/Classification title selected here may be a more general title than the position Working Title.

Clicking on the **Position/Classification Title** will open the **View Classification** page in a new tab within your web browser. After reviewing the classification summary information, you will need to close this tab in order to return to the **Classification** tab and your request in progress. **PLEASE NOTE:** Clicking on the red "X" on the top right corner of your web browser will close the web browser and log you out of the system. You can navigate to the previous tab by clicking on the "<<**Prev**" button located between the Save and Next buttons on the top right-hand corner of the page:

Pending Requests / / New Position Desc	Home	Position Desc	riptions Classifications	My Profile H	Naviga clicking	te to the previous tab by g on the Prev button.
Editing Pending Request	Classification					Save << Prev Next >>
Position Action Justif	If you are not adding from an a	victing position up	e "Eilter these results" to	acarah all EDA titlaa h	y a kay word. Click th	a selection button to the left of any leb Title
Classification	and then SAVE to select it. The	Position/Classific	cation title selected here ma	y be a more general til	le than the position V	Vorking Title. After selecting and saving a
Position Details	Position/Classification title, pro	ceed by clicking th	ie orange Next>> button.			
Position Funding Infor	If in the process of viewing or o the Classifications tab after r	hanging a job/clase eviewing the inform	ssification title you open the mation. Closing this tab will	Classifications tab, y return you to the Posit	ou have opened a ne ion Descriptions tal	w window within the system and need to <u>close</u> b and your request in progress.
Add ADA Checklist Form	Classifications - Filter these	results	_	,,		
EPA Designation Reques			Search all E	HRA class t	itles by	
Supplemental Documenta			clicking on	"Filter these	e results"	Classifications 💿
Click the radio button next to the	Saved Search: "Clas	sifications" (28	← Previous 123	4 5 6 7 8	9 10 Next →	
EHRA class title you	Position/Classification	Job Code	EPA Position Type	EPA E-class	(Actions)	
, want to select	Test EPA Class	Test	Tier I	Test	Actions	View an EHRA
	EPA Inte-1     New Title	244641	TBD	TBD	Actions -	classification summary
then click "Save"	© 4-H Program Assistant	80219	EPANFac	EN	Actions	by clicking on "Actions"
Next>>	© 4-H Specialist	81619	Fac11/12	F2	Actions	by clicking off Actions .
	O 4-H Youth Development Agent	80218	EPANFac	EN	Actions	-

# **EHRA Create New - Position Details Tab**

Follow the instructions at the top of the page, making sure to fill out all required fields highlighted in RED, and then click the Next button to save changes and navigate to the next tab:

Editing Pending Request	Position Details		Save << Prev Next >
Position Action Justif	Ally Check appling		
Classification	Check spenning		
Position Details	Complete each field. Require	a fields must be completed to continue through the process.	
Position Funding Infor	Required information		r
Add ADA Checklist Form	Contact Information		Who should be contacted if the
EPA Designation Reques	* Contact Name	This field is required.	are questions about the request
Supplemental Documenta	* Contact Phone Number	This field is required.	are questions about the request
Supervisor	t Contact Email	This field is required	
Pending Request Summary	Contact Entail		Who is the proxy for leave
	Proxy (For Leave Reporting)	If the requested position is a leave-reporting position (11/12 month or EPA Staff	reporting approvals?
	Proxy Phone Number		
	Proxy Email		
			Select faculty rank (if applicable)



# EHRA Create New – Position Details Tab – Primary Responsibilities and Duties

The next section of the Position Details tab is used to build **current duties and responsibilities** into the position. It is the <u>most important section</u> of a position description request, but easily missed by first-time users. Please read and follow all instructions in this area to ensure that your position description request is not delayed by providing too little information about the job duties.

On an EHRA position **at least one of** the three categories of Instructional, Research, and Administrative must be selected to describe the primary responsibilities of the job. Many EHRA jobs may be comprised of a combination of duties in more than one of these categories, but entry of only one will meet the minimum requirement for a job description.

To enter duties, click on the key button, Add Primary Responsibilities and Duties Entry. A pull-down list of the three categories will allow you to select the primary function first. Type in duties and examples of assigned work relevant to the primary function, and assign an approximate percentage of all work time spent on those duties. If desired, repeat these steps to add categories in order to capture the most important duties assigned to the position.

**Please Note**: Each time the Add Primary Responsibilities and Duties Entry button is clicked; you are taken back to the top of the Position Details Tab and will need to <u>scroll down</u> through the other sections again to see then location to add the new entry.

**IMPORTANT:** Completion of at least one entry is required in order to move this request to the next step in the approval workflow. The total percentage of time allocated for all categories should equal 100%:

	Primary Responsibilities a Describe the major respon Duties Entry" button. Repe addition to enter a new cal Add Primary Responsibilities a	selected.*  nd Duties sibilities and duties using the three categories at for each category relevant to job functions. legory and add job duties. The total percentag ind Duties Entry	of Instructional, Research, and Administrative. To entr Completion of at least one entry is required. You w e of time allocated for all categories should equal 100	er duties please click the "Add Primary Responsibilities and vill need to scroll back down to this section with each Click hore to add the major
	Supervisory Does this position supervise?	Please select  This field is required. HELP TEXT: Supervisory positions conduct interviews supervision, develop work plans and conduct perform following:	n, make final hiring decisions, provide salary recommendations, m ance appraisals for PERMANENT employees. If this position perf	responsibilities and duties - <u>1</u> entry is required.
	Number of Permanent Employees this Position Supervises Percent of Time Spent			
Clicking	Add Primary Respon	nsibilities and Duties Entry	ppens this section to enable ent	ry of duties:
Pr	imary Responsibilities and Du cribe the major responsibiliti	ties es and duties using the three categories of li	nstructional, Research, and Administrative. To enter	duties please click the "Add Primary Responsibilities and

* Function	Please select	e select 🗹 Select function fro		function from the drop down list.
Describe the specific tasks and responsibilities related to the function.				Describe specific tasks and responsibilities related to the function.
* Percentage of Time				
Remove Entry?           Add Primary Responsibilities a	nd Duties Entry	Click to add more	Indi task	cate percentage of time spent performing s and responsibilities described.

# **EHRA Create New – Position Details – Compliance and Requirements**

Completing the final position details fields identifies all required and preferred qualifications.

Supervisory		
* Does this position supervise?	Please select This field is required. HELP TEXT: Supervisory positions conduct interviews, make fit employees under direct supervision, develop work plans and co supervisory responsibilities, please indicate the following:	Select Yes or No from drop down list. and discipline induct performance appraisals for PERMANENT employees. If this position performs ALL of the ABOVE
Percent of Time Spent Number of Permanent Employees this Position Supervises		If Yes, then complete these fields.
Athletics		
Is this position assigned to the department of of Athletics or involved or associated with athletics, including but not limited to, responsibility for admission, certification of academic standing, evaluation of academic performance and administration of financial aid for student athletes?	Please select This field is required.	Question is required to ensure NCAA compliance.

Requirements and Prefere Is this position considered an essential position?	Please select This field is required.	Information from this section is used to populate the job posting when it is time to recruit.
Minimum Experience/Education	Bachelor's degree: or an equivalent combination of training and experience. All degrees must be received from appropriately accredited institutions.	
Preferred Years Experience, Skills, Training, Education	×	
Required License or Certification	×	
* Valid NC Driver's License required?	Please select This field is required.	
* Commercial Driver's License Required?	Please select This field is required.	
* Physical Required?	Please select This field is required.	
List any other medical/drug tests required	×	Complete this page by clicking on Save and Next>>
		Save << Prev N

## **EHRA Create New - Position Funding Information Tab**

In the Funding Source Details section of this tab, you will indicate the funding source(s) for this position. Click on the Add Funding Source Details Entry button to enter budget and other required codes. Select "Save" after each entry. PLEASE NOTE: The annual amount budgeted must equal the requested salary.

If you are unsure of what fund to use, the most up to date information may be found in **Banner Finance** on these forms:

1) FTVORGN- Provides a list of Org Codes

2) FTVFUND- Provides a list of Funds

3) FTVACCT- Provides a list of Accounts

These forms show listings of all active funds. For additional help, refer to the Banner Training Guide.

If the position has more than one funding source, click on the **Add Funding Source Details Entry** button and **"Save"** until all sources have been entered. **PLEASE NOTE:** Each time you add an additional entry, you will need to **scroll down below the last saved entry** to enter a new funding source. Once all funding sources have been added, click Nexter to move to the next tab:

	Home Position Descriptions Classifications   My Profile Help	
	Linc Butler, you have 0 messages. Supervisor 💌 C	logout
Pending Requests / / New Position Desc	ription / Senior Director for HR Communications / Edit	
Editing Pending Request	Position Funding Information IMPORANT NOTE: Remember to click "Save"	
Position Action Justif	Required Information     after each funding source is entered.	
Classification	Fundina Source Details	
Position Details	Indicate the funding source(s) for this position. Click on "Add Funding Source Details Entry" to enter hudget and other required codes. Select "SAVE" after each entry	
Position Funding Infor	Please note that the annual amount budgeted must equal the requested salary.	
Add ADA Checklist Form	If the position has more than one funding source, continue to select "Add Funding Source Details Entry" and "Save" until all sources are entered. Each time you add an	
EPA Designation Reques	additional entry, you will need to scroll down below the last saved entry to enter a new funding source	
Supplemental Documenta	Click here to add a funding source. If	
<ul> <li>Supervisor</li> </ul>	the position has more than one funding	•
Pending Request Summary	the position has more than one tunuing	
	source, continue to click here until all	
	funding sources are entered.	
	34	



# EHRA Create New - Add ADA Checklist Form Tab

The ADA checklist is used to determine the general physical requirements, physical activities, visual acuity, and working conditions of positions in order to be compliant with the provisions of the Americans with Disabilities Act of 1990.

Check each box that corresponds with the physical aspects of the essential functions of the position, then click to move to the next tab. All 4 fields are required and include:

- The physical activity of the position (Check all that apply and at least one)
- The physical requirements of the position (Select one from the drop down list)
- The visual activity requirements including color, depth perception, and field of vision (Check all that apply and at least one)
- The condition the worker will be subject to in the position (Check all that apply and at least one)

ADA Compliance Informati	n	
The physical activity of this position (Check all that apply and at least one)	Cimbing: Ascending or descending ladders, stairs, scaffolding, ramps, poles and the like, using feet and legs and/or hands and arms. Body agility is emphasized. This factor is important if the amount and kind of climbing required exceeds that requir Balancing: Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces. This factor is important if the amount and kind of balancing exceeds that needed for ordinary locomotion Gorden and forward by bending spine at the waist. This factor is important if it occurs to a considerable degree and requires full use of the lower extremities and back muscles. Crouching: Bending legs at knee to come to a rest on knee or knees. Crouching: Bending hand(s) and arm(s) in any direction. Standing: Particularly for sustained periods of time. Walking: Moving about on honds and feet. Using: Using upper extremities to exect force in order to large to thrust forward, downward or outward. Utiling: Particularly for sustained periods of time. Using: Using upper extremities to press against something with steady force in order to thrust forward, downward or outward. Utiling: Raising objects from a lower to a higher position or moving objects horizontally from position. This factor is important if it occurs to a considerable degree and requires the substantial use of the upper extremities and back musc Fingering: Picking, pinching, typing or otherwise working, primarily with fingers rather than with the whole hand or arm as in handing. Grasping: Applying pressure to an object with the fingers and palm. Fingering: Excensing attributes of objects, such as size, shape, temperature or texture by touching with skin, particularly that finger. Expressing or exchanging ideas by means of the spoken word. Those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudy, or quickly. Leading: Penceiving Hantaire of sounds at normal speaking levels with or without correctio	Check all that apply and at least one in this section.
The physical requirements of this position (Select One)	Please select This field is required.	



# **EHRA Create New – EHRA Designation Request Form Tab**

Complete the EHRA Designation Request Form when creating a new non-faculty position for review by Classification and Compensation to determine compliance with N.C.G.S. 126, 116 and UNC Policy 300.1.1. Please note the specific organizational chart requirements below. For more information about EHRA non-faculty definitions, see http://www.northcarolina.edu/hr/hrab/

	Home Position Descriptions Classifications   My Profile Help			
	Linc Butler, yo	ou have 0 messages. Supervisor 🔍 C logou		
ding Requests / / New Position Descr	ption / Senior Director for HR Communications / Edit			
Editing Pending Request	EPA Designation Request Form	Save <> Prev Next >>		
Position Action Justif	MS Check challing			
<ul> <li>Classification</li> </ul>	Complete the EPA Designation Request Form when creating a new non-faculty position for review by Classification and Compensation to determine compliance with N.C.G.S. 126, 116 and UNC Policy 300.1.1. Please note the specific organizational chart requirements below. For more information about EPA non-faculty definitions, see http://www.northcarolina.edu/hr/hrab/HRAB_Submission_Process_2-2013.pdf			
Position Details				
Position Funding Infor				
Add ADA Checklist Form	This form is only necessary on a position modification if the change in responsibilities would place	the position in a different EPA category.		
EPA Designation Reques	Request Details			
Supplemental Documenta	Enter University information.			
Supervisor				
Pending Request Summary	Division/School/College			
	Department			
	EPA Designation Requested	Select requested EHRA designation		
		_		
Proposed Position Informat	ion		Complete all fields.	
--	--	--	--	--
Proposed Title		l		
Proposed Working Title (if different)				
Proposed Position Number				
Proposed JCAT Code			Select current positio	n status ict
Current Status	Please select		from the drop down i	151.
Current Position Information	n (If Applicable)		Complete all fields.	]
Current Title				
Name of Employee in Position				
Name and Title of Supervisor				
Institutional Authorization (I	HR Use Only)		This section will be co	mpleted by HR.
Division of Human Resourc specific reference to relevan position titles, position numl Print Name	es will electronically submit completed for t elements in SAAO definition or Instruct bers, position designations (SPA, EPA, S	rm with the following red ional/Research definitio AAO), and employee na	uired documentation: -A written justifica nsA detailed position descriptionAn imes. *As defined by SAAO Policy, para	ation for requested action to include organizational chart that includes agraph I.A or I.B
Title				
Electronic Signature of HR Analyst via Email Submission				
				Save << Prev Next >>

## **EHRA Create New - Supplemental Documentation Tab**

The Supplemental Documentation Tab allows you to upload documents as attachments that will route

with the request through the approval workflow. Attachments can be uploaded as follows:

- **Upload New:** Choose this option if you want to upload a file from your computer.
- **Create New:** Choose this option if you want to create a new file to attach using the PeopleAdmin editor.
- **Choose Existing:** Choose this option is you want to attach a file that has already been uploaded into PeopleAdmin as part of another action.
- Add by URL (For Organizational Charts Only): Choose this option if you wish to link to a file on the web by its URL.

**The Organizational Chart is required.** Position requests will be returned to the Initiator if a current organizational chart is not attached. If a Budget Revision Form is needed to support the request, you can download it from the Budget and Planning Web Site (http://www.ncat.edu/research/documents/dored-documents/research-services-documents/budget-revise.xlsx), complete it, save it, and select "Upload New" as the option under Actions. Excel and Word documents may be attached. PDF conversion must be completed for the document to be valid when applicable:

								_
	Home P	osition Descriptions	Classifications	My Profile	Нер			
					Linc Butler, you have 0 messages.	Supervisor	• ¢	
ding Requests / / New Position Descr	iption / Senior Director for HR C	communications / Edit						
								Π
Editing Pending Request	Supplemental Doc	umentation				Save << Prev	Next >>	>
Position Action Justif	Organizational Chart in F	Dequired Desition rea	uppt will be returned	l to Initiator if a a	urrent era ebert is net etteched. I	If Dudget Devision F	- in	
Classification	needed to support action	, download it from the	e Budget and Planni	ng Web Site (http	://www.ncat.edu/research/docur	ments/dored-	omis	
Position Details	documents/research-ser	vices-documents/bud	get-revise.xisx ), cor	npiete it, save it,	and select "Upload New" as the	option under Action	IS.	
Position Funding Infor	Excel and Word docume	nts may be attached.						
Add ADA Checklist Form	PDF conversion must be	completed for the do	cument to be valid v	when applicable.				
EPA Designation Reques	Document Type N	ame Status (Action		ick "Actio	ne" than calact Un			
Supplemental Documenta	Organizational Chart	Actions		ICK ACLIO	ns, then select of	Joau New,		
Supervisor	Budget Revision Form	Upload New Create New		eate New	. Choose Existing.	or Add by		
Pending Request Summary	Other Document	Choose Existing			,			
	Post Doctoral Evaluation	Add by URL		KL in orde	r to upload an atta	achment. 37	7	
							ext >>	

#### **EHRA Create New - Supervisor Tab**

The **Supervisor Tab** allows you to select the position to which your new position will report. If you are not editing from an existing position, use **"Filter these results"** to search all supervisors by a key word. **PLEASE NOTE:** The selection list of supervisors is dependent on **the POSITION TYPE (SHRA or EHRA)** being created. To select a supervisor in a <u>different</u> Position Type (for example EHRA supervising SHRA), click on **"Filter these results"** and select the <u>Position Type</u> to which the supervisor of the position belongs. Then click on **"Search"** to access the list of supervisors in the selected Position Type.

To view one of the position descriptions in the list, click on the **"Actions"** link next to the classification title you want to view and select **"View"**, or click on the **Working Position Title.** To return from the summary, use the Back button located on the top left corner of your web browser. To **select** a position description to which your new position will report and proceed with creating the position description, click on the **Radio Button** to the left of the position description you want to select, then and click on the **Nexted** button located on both the top and bottom right-hand corners of the page.

**REMEMBER:** The positions that appear in this list are based on your active user type (Supervisor, Department Head, Dean / Vice Chancellor):

Pending Requests / / New Position Des	Home Po	osition Descriptions	Classifications   My Profile	Navigate to the pre clicking on the "< <f< th=""><th>vious tab by Prev" button.</th></f<>	vious tab by Prev" button.
Editing Pending Request	Supervisor			Save	<< Prev Next >>
Position Action Justif	Position Descriptions	Filter these results			
Classification	r osition bescriptions -	The these results	Search all posi	tion descriptions by	
Position Details			clicking on "Fil	ter these results".	iptions 🛛 🗵
Click the radio button next to the	<ul> <li>Saved Search:</li> <li>Working Position Title</li> </ul>	Position Description Position Number	ons" (6 Items Found) Department	Position/Classification Title	(Actions)
position	EPA Position - 2	76767			Actions
description you	O DHR EPA Position Test 1	12345	View the position	descriptions	Actions
uescription you	Director		summary by click	ing on "Actions",	Actions
want to select,	Assistant VC for HR		then "View" or by	clicking on the title.	Actions
then click	AVC for Student Affairs	22233			Actions
//	Anniatant Man Ohmenseller	for a	Componentian Deposite 9	Position	

### **EHRA Create New - Pending Request Summary Tab**

The **Pending Request Summary Tab** allows you to perform a final review all of the position information you've entered on the previous tabs prior to sending the request to the next step in the approval workflow. The **Blue Circle Check** appears by those tabs for which all required information has been entered:



An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save"**, and then return to the **Pending Request Summary Tab** by clicking on the link in the left column:

<u>e</u> F	Position Det	ails <u>Edit</u>	Click "Edit" to make edits to a tab.	
Orange Exclamat	e Circle ion Point	ation ict Name		·
-	Con	tact Email		
	Proxy (For	Leave Reporting)		
	Proxy P	hone Number		

Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example, the appropriate routing action is **"Send to Department Head (Move to Department Head)"**:

North Carolina				Inbox	PeopleAdmin	
A&T STATE UNIVERSITY				Watch List	POSITION MANAGEM	ENT 🔻
H	ome Position Descriptions	Classifications	My Profile	Неір		
				Linc Butler, you have 0 messages. Su	oervisor 💌 C	logout
Pending Requests / / New Position Description / New Position         New Position Description: Senior         Communications (EPA)         Edit         Current Status: Draft         Position Type: EPA         Section/Unit: Human Resources         Summary         History         Settings	definition / Summary Click on "Take Ac Request", then se Department Head request to the ne approval workflo	tion On Pen elect "Send a d" to move a xt step in th w.	ding to the te	Take Action On Pending Red WORKFLOW ACTIONS Keep working on this Pend Request Canceled (move to Cancel Send to Department Head) Canceled (move to Cancel	uest v ing ed) (move to ed)	
Position Action Justification Edit						

You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable in the History tab by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send the action to the next level in the approval workflow, click the "Submit" button:



If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation.

🕕 "The physical activity of this po	isition (Check all that apply and at least one)" is required and All required fields must be set before transitio	ning.
North Carolina A&T State University		Watch List
	Home Position Descriptions Classifications   My Profile Help	

Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

Pending Request was successfully transitioned, and it was added to your watch list						
North Carolina A&T State University						
		Home	Position Descriptions	Classifications	My Profile	Help
Green confirmation bar indicating the Pending						
Request was successfully transitioned and						
hequest was successfully transitioned and						
added to your Watch List.						
	Pending Request was successfully transitioned, and it was added to your watch list.	Pending Request was successfully transitioned, and it was added to your watch list.	Pending Request was successfully transitioned, and it was added to your watch list.  NORTHCAROLINA AGT STATE UNIVERSITY Home Green confirmation bar indicating the Pending Request was successfully transitioned and added to your Watch List.	Pending Request was successfully transitioned, and it was added to your watch list.  North CaroLina Ast State University  Green confirmation bar indicating the Pending Request was successfully transitioned and added to your Watch List.	Pending Request was successfully transitioned, and it was added to your watch list.  North CaroLina Ast State University  Green confirmation bar indicating the Pending Request was successfully transitioned and added to your Watch List.	Pending Request was successfully transitioned, and it was added to your watch list.  Home Position Descriptions Classifications   My Profile  Green confirmation bar indicating the Pending Request was successfully transitioned and added to your Watch List.

The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

### **Create New Position Description – Post Doctoral**

**IMPORTANT NOTE:** Prior to establishing and hiring for a Postdoctoral Associate position, Principal Investigators (PI) should review the <u>Postdoctoral Scholars Policy</u>. Approval for program participation and proposed postdoc positions must be granted by the Vice Chancellor for the Division of Research and Economic Development (DORED) before initiating a request in this system. If approved, DORED will assign a position number.

The proposed effective date must be a future date, subject to change based on completion of all program requirements by the selected candidate and the date of hire. The requested salary, if entered, must reflect a budgeted available amount to be identified with a funding source and is subject to DHR and budget review and approval.

To initiate a **Create New Position Description** request for a Post Doctoral position, first switch to the **Position Management** module using the drop down menu located in the top right corner of the page:

Home Postings Hiring Proposals   My Profil Linc Butler, you have 0 messages. Supervisor I logout						Inbox	<b>People</b> Admin	
Home         Postings         Hiring Proposals         My Profil         Management.           Linc Butler, you have 0 messages.         Supervisor         C         logout					Click on Position	Watch List	APPLICANT TRACKING   POSITION MANAGEMENT	
	Home	Postings	Hiring Proposals	My Profil	Management.	messages Supe		ut

Once in the **Position Management** module, make sure you have the necessary active user type. <u>Remember</u>: only Supervisor, Department Head, and Dean/Vice Chancellor user types can initiate a **Create New Position Description** request:

		Inbox PeopleAdmin Watch List POSITION MANAGEMENT V
Home Position Descriptions	Classifications   My Profile Help	
	First select the appropriate user type: Supervisor, Department	ages. Supervisor 💌 C logout
ment and Position Management S	ystem	Then click on the Refresh button.

Next, hover your cursor over the **Position Descriptions** tab and click on "Post Doctoral":

NORTH CAROLINA						Inbox	PeopleAdmin
A&T STATE UNIVERSITY						Watch List	POSITION MANAGEMENT V
		Home	Position Descriptions	Classifications	My Profile	Help	
			SPA			Linc Butler, you have 0 messages.	upervisor 💌 🕏 logout
			SPA Pending Requests				
Hover cursor over	Position		EPA				
Descriptions tab a	nd click on		EPA Pending Requests				
Post Doctoral			Post Doctoral	1			
			Post Doctoral Pending Requ	uests			
						Objection de	

You will then be taken to the **Position Descriptions** view, which provides a list of all position descriptions based on your active user type as follows:

Active User Type	Positions in Position Descriptions List
Supervisor	Positions that are direct reports to the Supervisor only.
Department Head	All positions that report to the department the Department Head is assigned to.
Dean / Vice	All positions within the School, College, or Division the Dean / Vice Chancellor is
Chancellor	assigned to.

In the **Position Descriptions** view, you can search position descriptions by any number of criteria, including but not limited to position title, position number, employee name, supervisor name, or position status. Searches are fully customizable by position attributes, and you can save custom searches for use again later.

NORTH CAROLINA A&T STATE UNIVERSITY							Unbox Watch List	PeopleAdmi     Position Mai	n Iageme
	Home Po	osition Descriptions	Classifications	My Profile	Help				
ition Descriptions / Post Doctoral				Active Super	user ty visor.	pe is	s s	upervisor	• ¢
Post Doctoral Position D	Descriptions						Create N	lew Position Descr	ption
Open Saved Search + Sear t of position descr	reh: iptions by ve. To <u>modify an</u>	existing position, sele	arch More search o	low by clicking o	n the w sa	arches osition a ved for	are custo attributes later use	mizable I and can	oy be
Open Saved Search • Sear t of position descr tive user type. Ad hoc searc • Saved sarch: "Position D	reh: iptions by Position Descriptions Descriptions" (1 Item Found)	existing position, sele	Arch More search o	low by clicking o	n the w sa	arches osition a ved for	are custo attributes later use	mizable I and can	be ctions
Open Saved Search	rch: iptions by Position Descriptions Descriptions" (1 Item Found) Position Description Title	existing position, sele	arch More search o ect it from the list bel	low by clicking o	n the w sa	arches osition a ved for	are custo attributes later use	mizable I and can	be ctions

To initiate the request, click on the orange **"Create New Position Description"** button located on the top right of the screen just below the grey bar:

					Un Watch	box	PeopleAdr POSITION M	nin IANAGEMEN	п •
Home	Position Descriptions	Classifications	My Profile	Help					
				Linc Butler,	, you have 0 messages.	Supe	ervisor	• ¢	logout
		Click here to	) initiate the r	equest.	Creat	te New	Position Des	cription	
		Search	Hide search options						

You will then click on "New Position Description" as the pending request you would like to start:



Enter the data fields for the **New Position Description** as follows then click the orange **"Start Pending Request"** button located on the top right corner of the page:

NORTH CAROLINA		(Inbox) PeopleAdmin
A&I STATE UNIVERSITY		Watch List POSITION MANAGEMENT
Home	Position Descriptions Classifications   My Profile H	elp
		inc Butler, you have 0 messages. Supervisor 💽 C logout
Position Descriptions / Post Doctoral / New Position Description		
New Position Description	4. Once all data fields are filled in, click Start Pending Request.	Start Pending Request Cancel
Working Position Title		1. Enter the Working Title of the position.
Organizational Unit		
Department * Section/Unit * Clone an existing Position Description?	3. Select the Section/Unit to which the position	2. Select the department to which the position is assigned from the drop down list.
	assigned from th drop down list.	e 42

# Post Doctoral Create New - Edit Pending Request Page - General Navigation

After clicking on the "**Start Pending Request**" button, you will then be taken into the **Position Action Justification tab**, the first information tab that must be completed before the Position Description can be sent to the next step in the approval workflow. Each information tab is listed on the **Edit Pending Request** menu in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while all other tabs will appear as blue links.

You can save the changes you've made to the active tab you're working on and navigate to the next tab in the list simultaneously by clicking the Next>> button located in both the top and bottom right corners of the page. You can save the active tab you're working on and stay on the same tab by clicking the "Save" button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column, however this action **WILL NOT** save any changes made to the tab you are navigating away from.

Required fields are highlighted in **red** and must be filled in before the Position Description can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The Blue Check Circle also appears next to tabs that do not contain any required fields. (In this example, because the position had been previously approved, the required fields have been completed. It is important to remember to make the necessary revisions to all key fields in a modification action because in many cases, you will not receive "prompts" to update when a field is populated already).

Tab list		Home Position Descriptions Classifications	a j My Polite Help
Party sequences and the second law	oripition / Research Associate / Edit		real name for our consults. (when not all 2010)
Editing Puting Request	Position Action Justi	fication	Save and Next buttons.
Position Action Justi	Theck spelling		
Position Details	Prior to establishing and hirin	g for a Postdoctoral Associate position, Principal Investigators (PI) should review the Po	Postdoctoral Scholars Policy. Approval for program participation and proposed postdoc positions must be granted by the Vice approved, DORED will assign a position number.
Position Funding Infor Add ADA Checklist Form	To stop a	and return to request later,	ed, must reflect a budgeted available amount to be identified with a funding source and is subject to DHR and budget review
Supplemental Documenta	click Star	t Pending Request.	
Supervisor     Dependent Dependent Company			
	Justification of Need for New Position	The first surgery	Required fields
Blue Check	Proposed Effective Date	This field is required	highlighted in RED.
Circle	Basis for EPA Status	· · · · · · · · · · · · · · · · · · ·	
	Enter Research or Instructional		
	DORED Position Number		
	Requested Salary	Click on this link to review an NH reference on Postdoctoral Salary Guidelines: Mgr.Rever.noat.edu	adu/hriticumentu/post-doctalary_guidalnas.doc
	Position Request Number		Save and Next buttons.

#### Post Doctoral Create New - Saving to Return to a Pending Request Later

Also on the Editing Pending Request Tab List is an important menu item which should be selected if you need to stop a work session on the position description before submitting it to the next level for approval. Following these steps will ensure that all your work is saved when you open the request for completion.

- 1) Click the "Save" button located in either the top or bottom right corner
- 2) Select "Pending Request Summary" from the Tab List (illustrated above)
- 3) Select "Keep Working on this Pending Request"



4) Add any Comments into the window that opens (illustrated below) as notes to yourself, if desired5) Click "Submit"

Requests / / Modify Position Description / Post Doctoral Research Assoc	Take Action	Aboignasem snanbazi, you nave o messages. Supervi
Modify Position Description: Post Doctoral Research Associate (Post Doctoral) Edit Current Status: Draft	Keep working on this Pending Request Comments (optional)	
Position Type: Post Doctoral         Created by: Abolghasem SI           Section/Unit: Bioenergy Center         Owner: Abolghasem Shahi		
Summary History Settings	 Add this pending request to your watch list?	
Position Action Justification Edit	Submit Cancel	
Position Action Justification		

The **Pending Request** on this position description numbers can be located when you log into the Position Description module again as the same **User Type** you used to begin the action. Hover your cursor over the **Position Descriptions tab** and click on **"SHRA Pending Requests."** 

You will then return to the **Position Descriptions view**, which provides a list of all position descriptions based on your active user type, from which you can select this position number as before and continue.

ending	Requests / _ / New Position Description	on C. New Por	ution definition 7 Summary
	New Position Description Doctoral) Edit Current Status: Draft	on: Rese	earch Associate (Post Click on "Edit" to continue work on a "Create New
	Position Type: Post Doctoral Section/Unit: Civil Architect and Environ Engineer	Creati Owne	Position Description" request already started and saved.

## Post Doctoral Create New - Position Action Justification Tab

Prior to establishing and hiring for a Postdoctoral Associate position, Principal Investigators (PI) should review the Postdoctoral Scholars Policy. Approval for program participation and proposed postdoc positions must be granted by the Vice Chancellor for the Division of Research and Economic Development (DORED) before initiating a request in this system. If approved, DORED will assign a position number.

The proposed effective date must be a future date, subject to change based on date of hire. The requested salary, if entered, must reflect a budgeted available amount to be identified with a funding source and is subject to DHR and budget review and approval. Once all fields are complete, click the button to save changes and navigate to the next tab:

Editing Pending Request	Position Action Justification	Save Next >>
Position Action Justif	🛱 Chack spalling 🗐	
Classification	<ul> <li><u>onveropenny</u> (-)</li> <li><u>District openny</u> (-)</li> </ul>	
Position Details	must be granted by the Vice Chancellor for the Division of Research and Economic Development (DORED) before initiating a request in this system. If approved, DC	DRED will assign a position number.
Position Funding Infor	The proposed effective date must be a future date, subject to change based on date of hire. The requested salary, if entered, must reflect a budgeted available amor	unt to be identified with a funding source and is
Add ADA Checklist Form	subject to DHR and budget review and approval.	
Supplemental Documenta	* Required Information	
<ul> <li>Supervisor</li> </ul>	Position Action Justification	
Pending Request Summary	Justification of Need for New Position     Proposed Effective Date     This field is required.     Must be a future     Basis for EPA Status	eded? date.
support the request must	Enter Research or Instructional Provide the basis for describing the position	r EHRA status by role as Research or
be secured	Number Instruction	onal
PRIOR TO initiation of the request.	Requested Salary Click on this link to review an NIH reference on Postdoctoral Salary Guidelines: http://www.ncat.edu/hr/documents/post-doc/salary_guidelines.doc Position Request Number	Link to NIH reference on Postdoctoral
		Salary

# Post Doctoral Create New - Classification Tab

Select Post Doctoral Research Associate or Post Doctoral Teaching Associate by click on the **Radio Button** to the left of the classification title you want to select, then and click "**Save**" or the Nexted on both the top and bottom right-hand corners of the page.

To view a classification summary, click on the "Actions" link next to the classification title you want to view and select **View Classification.** To return from the summary, use the Back button located on the top left corner of your web browser.

Clicking on the **Position/Classification Title** will open the **View Classification** page in a new tab within your web browser. After reviewing the classification summary information, you will need to close this tab in order to return to the **Classification** tab and your request in progress. **PLEASE NOTE:** Clicking on the red "X" on the top right corner of your web browser will close the web browser and log you out of the system. You can navigate to the previous tab by clicking on the grey "<<**Prev**" button located between to the Save and Next buttons on the top right-hand corner of the page:

Guidelines.

Pending Requests / / New Position Desc	Home Position D	Descriptions Cla	ssifications   My	Profile He Na	avigate to the previous tab by cking on the "< <prev" button.<="" th=""></prev">
Editing Pending Request	Classification				Save << Prev Next >>
Position Action Justif Classification	Select Post Doctoral Research A select Next>>	ssociate or Post Do	octoral Teaching Assoc	ciate by clicking the	selection button and then SAVE to select it. Then
Position Details	Please note that clicking on the	e Position/Classifi	cation title instead of	f the selection butt	on will open a new tab. If you open the
Position Funding Infor			Into the Position Des	criptions tab and yo	ou request in progress.
Add ADA Checklist Form	Classifications - Filter these re	sults			
Supplemental Documenta					Post Doc Classifications
lick the radio	Saved Search: "Post I	Ooc Classification	ns" (2 Items Found)		
outton next to the	Position/Classification Title	Job Code	EPA E-class	(Actions)	
ost Doc class title	Post Doc Research Associate	81069	EN	Actions	View a Post Doc
ou want to select,	Post Doc Teaching Associate	81604	EN	Actions	classification summary
hen click "Save" and					by clicking on "Actions".

# Post Doctoral Create New – Position Details Tab

Follow the instructions at the top of the page, making sure to fill out all required fields highlighted in red, and then click the Next> button to save changes and navigate to the next tab:

Pending Requests / / New Position Descr	iption / Research Associate / Edit
Editing Pending Request	Position Details Save <pre>Save</pre>
Position Action Justif Classification Position Details Resition Europian Infor	Check spelling  Complete each field. Required fields must be completed to continue through the process. * Required Information
Add ADA Checklist Form     Supplemental Documenta     Supervisor	Contact Information Contact Name Contact Name Contact Phone Number This field is required Who should be contacted if there are questions about the request?
Pending Request Summary	Contact Email Contact Email Proxy (For Leave Reporting) Proxy Phone Number This field is required. Who is the proxy for leave reporting approvals?
	Proxy Email     This field is required. Classification Information Position/Classification Post Doc Research Associate
	Title     Title       Job Code     81069       EPA E-class     EN



#### Post Doctoral Create New – Position Details Tab – Primary Responsibilities

The next section of the Position Details tab is used to build **current duties and responsibilities** into the position. It is the <u>most important section</u> of a position description request, but easily missed by first-time users. Please read and follow all instructions in this area to ensure that your position description request is not delayed by providing too little information about the job duties.

On a post doctoral position, at **least one of** the three categories of Instructional, Research, and Administrative must be selected to describe the primary responsibilities of the job. Entry of only one will meet the minimum requirement for a job description.

To enter duties, click on the key button, "**Primary Responsibilities and Duties Entry**." A pull-down list of the three categories will allow you to select the primary function first. Type in duties and examples of assigned work relevant to the primary function, and assign an approximate percentage of all work time spent on those duties. If desired, repeat these steps to add categories in order to capture the most important duties assigned to the position.

**Please Note**: Each time the "Add Entry" button is clicked; you are taken back to the top of the Position Details Tab and will need to <u>scroll down</u> through the other sections again to see then location to add the new entry.

**IMPORTANT:** Completion of at least one entry is required in order to move this request to the next step in the approval workflow. The total percentage of time allocated for all categories should equal 100%:

Primary Responsibilities and Duties	
Describe the major responsibilities and duties us please click the "Add Primary Responsibilities at	sing the three categories of Instructional, Research, and Administrative. To enter duties nd Duties Entry" button. Repeat for each category relevant to job functions and SAVE
If the position requires duties in more than a sine	gle category, you will need to complete a Link to sample Post Doc position description.
and job duties. The total percentage of time allo	cated for all categories should equal 100%
A sample Post Doctoral Scholar position descript doc/pd_job_description_template.doc. You may Entry."	copy and paste wording from this template into the "Primary Responsibilities and Duties
Add Primary Responsibilities and Duties Entry	Click to add the major responsibilities and duties - <u>1 entr</u> 7s required.

Primary Responsibilities and	d Duties		
Describe the major responsi please click the "Add Primar after each category is addeo	bilities and duties using the three categories of Instru y Responsibilities and Duties Entry" button. Repeat fo d. <b>At least one entry is required</b> to complete a positi	ctional, Resear or each categor on description	rch, and Administrative. To enter duties ry relevant to job functions and SAVE request.
If the position requires duties and job duties. The total per	s in more than a single category, you will need to <b>scr</b> centage of time allocated for all categories should eq	<b>oll back down</b> ual 100%	to this section to add another category
A sample Post Doctoral Sch doc/pd_job_description_tem	olar position description is available for your reference plate.doc. You may copy and paste wording from this	e at this link: ht s template into	tp://www.ncat.edu/hr/documents/post- the "Primary Responsibilities and Duties
* Function	Please select 💌	ect functior	n from the drop down list.
Describe the specific tasks and responsibilities related to the function.			Describe specific tasks and responsibilities related to the function.
* Percentage of Time		Indicate p	percentage of time spent

## Post Doctoral Create New – Position Details – Compliance and Requirements

Completing the final position details fields identifies all required and preferred qualifications.



#### **Post Doctoral Create New - Position Funding Information Tab**

In the Funding Source Details section of this tab, you will indicate the funding source(s) for this position. Click on the Add Funding Source Details Entry button to enter budget and other required codes. Select "Save" after each entry. PLEASE NOTE: The annual amount budgeted must equal the requested salary.

If you are unsure of what fund to use, the most up to date information may be found in **Banner Finance** on these forms:

- 1) FTVORGN- Provides a list of Org Codes
- 2) FTVFUND- Provides a list of Funds
- 3) **FTVACCT** Provides a list of Accounts
- These forms show listings of all active funds. For additional help, refer to the Banner Training Guide.

If the position has more than one funding source, click on the **Add Funding Source Details Entry** button and **"Save"** until all sources have been entered. **PLEASE NOTE:** Each time you add an additional entry, you will need to **scroll down below the last saved entry** to enter a new funding source. Once all funding sources have been added, click "**Next>>"** to move to the next tab:

		Home	Position Descriptions	Classifications   My F	Profile Help		
					Linc Butler, you have 0 mes	ssages. Supervisor 💌	· C lo
nding Requests / / New	w Position Descri	ption / Research Associa	nte / Edit				
Editing Pending R	equest	Position Fun	IMPORANT NO	DTE: Remember t	o click "Save"	Save << Prev Ne	ext >>
Position Action Ju	ıstif	* Required Informatio	after each fun	ding source is en	tered.		
Classification		Funding Source	Details				
Position Details		Indicate the fundir	a source(s) for this positi	on Click on "Add Funding s	Source Details Entry" to enter bu	udget and other required cod	les
Position Funding	g Infor	Select "SAVE" after	er each entry. Please not	e that the annual amount bu	idgeted must equal the requeste	ed salary.	
Add ADA Checklis	st Form	If the position has	more than one funding s	ource, continue to select "A	dd Funding Source Details Entry	y" and "Save" until all source	es are
Supplemental Do	cumenta	entered. Each time source.	e you add an additional e	ntry, you will need to <b>scroll</b>	down below the last saved er	ntry to enter a new funding	
<ul> <li>Supervisor</li> </ul>		Add Funding Source	e Details Entry	Click here to ac	ld a funding source.	lf	
r onding request	Cummury			the position ha source, continu funding source	s more than one fur le to click here until s are entered.	all	
State Appropriated Funding / Non-State	Please select		Select	State or Non-Stat	e from drop down l	list.	
Appropriated Funding					•		
source of funding:	Please select		If Non-	State, select fund	ling source from dro	op down list.	
Additional funding source information	If "Other" select funds.	ed above, designate source.	Provide position number if funds	are being transferred from another p	osition. Attach Budget Revision Form as Su	upplemental Document if necessary to	) transfe
monies?							
Budget Code	Please select						
Fund	Format: 6 digit r	number #######		rdinato with DOD	ED on		
Org	Format: 5 digit r	number ######	func	ling source inform	nation.		
Account	Format: 5 digit r	number ######	L				
Program	Format: 3 digit r	number ####		Enter date fund	ls end (if time-	7	
Date Funds End				limited), annua	l amount, and		
Annual Amount				percentage of I	TE.		
Percentage of FTE				20.000		<b>_</b>	
Remove Entry?				Complete this	hage by clicking on		

### Post Doctoral Create New - Add ADA Checklist Form Tab

The ADA checklist is used to determine the general physical requirements, physical activities, visual acuity, and working conditions of positions in order to be compliant with the provisions of the Americans with Disabilities Act of 1990.

Check each box that corresponds with the physical aspects of the essential functions of the position, then click "**Next>>**" to move to the next tab. All 4 fields are required and include:

- The physical activity of the position (Check all that apply and at least one)
- The physical requirements of the position (Select one from the drop down list)
- The visual activity requirements including color, depth perception, and field of vision (Check all that apply and at least one)
- The condition the worker will be subject to in the position (Check all that apply and at least one)



# Post Doctoral Create New - Supplemental Documentation Tab

The **Supplemental Documentation Tab** allows you to upload documents as attachments that will route with the request through the approval workflow. Attachments can be uploaded as follows:

- **Upload New:** Choose this option if you want to upload a file from your computer.
- **Create New:** Choose this option if you want to create a new file to attach using the PeopleAdmin editor.
- **Choose Existing:** Choose this option is you want to attach a file that has already been uploaded into PeopleAdmin as part of another action.
- Add by URL (For Organizational Charts Only): Choose this option if you wish to link to a file on the web by its URL.

**The Organizational Chart is required.** Position requests will be returned to the Initiator if a current organizational chart is not attached. If a Budget Revision Form is needed to support the request, you can download it from the Budget and Planning Web Site (http://www.ncat.edu/research/documents/dored-documents/research-services-documents/budget-revise.xlsx), complete it, save it, and select "Upload New" as the option under Actions. Excel and Word documents may be attached. PDF conversion must be completed for the document to be valid when applicable:

	·			
Editing Pending Request	Supplemental Do	cumentati	on	Save <> Prev Next
Position Action Justif	Organizational Chart in	Poquirod Por	ition request	ill be returned to Initiater if a current are chart is not attached. If Budget Povision Form is
<ul> <li>Classification</li> </ul>	needed to support actio	n, download it	from the Bu	et and Planning Web Site (http://www.ncat.edu/research/documents/dored-
Position Details	documents/research-se	rvices-docum	ents/budget-i	/ise.xlsx ), complete it, save it, and select "Upload New" as the option under Actions
Position Funding Infor	PDF conversion must b	e completed f	or the docum	t to be valid when applicable.
Add ADA Checklist Form	Document Type	Name Status	(Actions)	
Supplemental Documenta	Organizational Chart		Actions	Click "Actions", then select Upload New.
Supervisor	Budget Revision Form	rm Upload New Create New		Create New, Choose Existing, or Add by
Pending Request Summary	Post Doctoral Evaluation	Choose Ex	kisting	LIPL in order to unload an attachment
		Add by UP	iL	ORE IN Order to upload an attachment.

#### Post Doctoral Create New - Supervisor Tab

The **Supervisor Tab** allows you to select the position to which your new position will report. If you are not editing from an existing position, use **"Filter these results"** to search all supervisors by a key word. **PLEASE NOTE:** The selection list of supervisors is dependent on **the POSITION TYPE (SHRA or EHRA)** being created. To select a supervisor in a <u>different</u> Position Type (for example EHRA supervising SHRA), click on **"Filter these results"** and select the <u>Position Type</u> to which the supervisor of the position belongs. Then click on **"Search"** to access the list of supervisors in the selected Position Type.

To view one of the position descriptions in the list, click on the **"Actions"** link next to the classification title you want to view and select "**View**", or click on the **Working Position Title.** To return from the summary, use the Back button located on the top left corner of your web browser. To **select** a position description to which your new position will report and proceed with creating the position description, click on the **Radio Button** to the left of the position description you want to select, then and click on the orange "**Next>>**" button located on both the top and bottom right-hand corners of the page.

**REMEMBER:** The positions that appear in this list are based on your active user type (Supervisor, Department Head, Dean / Vice Chancellor):

Pending Requests / / New Position Des	Home Position Descriptions Cl	assifications   My Profile He	Navigate to the previous tab by clicking on the "< <prev" button.<="" th=""></prev">
Editing Pending Request	Supervisor		Save <pre> Next &gt;&gt;</pre>
Position Action Justif  Classification	Position Descriptions - Filter these results	Search all positi clicking on "Filte	on descriptions by er these results".
button next to the position description you want to select, then click "Next>>".	Saved Search: "Position Descriptions"     Working Position     Title     Post Doc Resarch Associate	(1 Item Found) View the position of summary by clickin then "View" or by o	descriptions og on "Actions", clicking on the title.

# Post Doctoral Create New - Pending Request Summary Tab

The **Pending Request Summary Tab** allows you to perform a final review all of the position information you've entered on the previous tabs prior to sending the request to the next step in the approval workflow. The **Blue Circle Check** appears by those tabs for which all required information has been entered:

	Home	Position Descriptions	Classifications   My Pro	ofile Help			
				Linc B	utler, you have 0 messages.	Supervisor	C logout
Pending Requests / / New Position Description / New	ew Position definitio	n / Summary					
New Position Description: F Doctoral) Edit Current Status: Draft	Research As	sociate (Post			Take Action On Pendin	g Request 🔻	
Position Type: Post Doctoral Section/Unit: Civil Architect and Environ Engineer	Created by: Linc Bu Dwner: Linc Butler	tler					
Position Action Justification	Edit						
Position Action Justification			o make edits to a	tab.			
Blue Circle Check	Test Currently: blank						
Hoposed Enective Date	08/31/2013 Currently: blank						
Basis for EPA Status	Test						

An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save"**, and then return to the **Pending Request Summary Tab** by clicking on the link in the left column:

9	Position Det	ails <u>Edit</u>	Click "Edit" to make edits to a tab.	
Orang	e Circle	ation		
Exclamat	tion Point	ct Name		
	Contact	Phone Number		
	Con	tact Email		
	Proxy (For	Leave Reporting)		
	Proxy P	hone Number		52

Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example, the appropriate routing action is **"Send to Department Head (Move to Department Head)"**:

	Home Position Descriptions	Classifications	My Profile Help	
			Linc Butler, you have 0 messages. Supervisor	💌 🕈 logout
Pending Requests / / New Position Description / New Pos	tion definition / Summary			
New Position Description: Rese           Doctoral)         Edit           Current Status: Draft         Position Type: Post Doctoral           Position Type: Post Doctoral         Created           Section/Unit: Civil Architect and         Owner:           Summary         History         Settings	Click on "Take Act Request", then se Department Heac request to the net approval workflor	tion On Pendin elect "Send to d" to move the xt step in the w.	Take Action On Pending Request  WORKFLOW ACTIONS Keep working on this Pending Request Canceled (move to Canceled) Send to Department Head) Canceled (move to Canceled)	
Position Action Justification Edit				
Position Action Justification				
Justification of Need for New Position	ntly: blank			

You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable in the History tab by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send the action to the next level in the approval workflow, click the "Submit" button:

	Take Action	×			
	Send to Department Head (mo Department Head)	ve to	are or	ntional and can be	1
	Comments (optional)	viewed by in the Histo	he ne ry tab	xt level approver 0.	
	Add this pending request to your list?	watch		Adding the a List allows y monitor the	action to your Watch ou to easily track and action's progress.
has	Submit	Cancel			

If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation.

🕕 "The physical activity of this pos	ition (Check all that apply and at least one)" is required and All required fields must be set before transition	ing.
A&T STATE UNIVERSITY		Watch List
	Home Position Descriptions Classifications   My Profile Help	

Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:



The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

## **Modify Position Description – SHRA**

IMPORTANT NOTE: If the Modify action is being used to build an existing vacant position into People Admin 7 in order to initiate recruitment, the budgeted available amount will be confirmed in the approval process. If the Modify action is being used to request an increase or change in funding, identify a funding source PRIOR TO the initiation of the request. Budgeted funds are subject to review and approval.

To initiate a Modify Position Description request for an SHRA position, first switch to the Position Management module using the drop down menu located in the top right corner of the

				Click on Position Management.	Inbox Watch List	PeopleAdmin Applicant tracking Position Management	
Home	Postings	Hiring Proposals	My Pr	rofile Help			
				Linc Butler, you hav	e 0 messages. Sup	ervisor 💌 C lo	gout

Once in the Position Management module, make sure you have the necessary active user type. Remember: only Supervisor, Department Head, and Dean/Vice Chancellor user types can initiate a Modify Position Description request:

		(Inbox) Watch List	PeopleAdmin POSITION MANAGEMENT ▼
Home Position Descript	First select the appropriate user type: Supervisor, Department	r, Junnarowski Supervisor 💌 C	
	Head, <u>or</u> Dean / Vice Chancellor.	Then click on th	ne Refresh
ment and Position Manageme	ent System	button.	

Next, hover your cursor over the Position Descriptions tab and click on "SHRA":

NORTH CAROLINA					(n	box	PeopleAdmin	
A&T STATE UNIVERSITY					Watch	List	POSITION MANAGEMEN	VT V
Home	Position Descriptions Clas	sifications	My Profile	Help				
	SPA			Linc Butler, you	have 0 messages.	Super	rvisor 🔻 C	logout
	SPA Pending Requests				-			-
	EPA							_
	EPA Pending Requests							
Welcome to your Online Recruitment and Posit	Post Doctoral	•						
	Post Doctoral Pending Requests							
				S	bortcuts			

You will then be taken to the Position Descriptions view, which provides a list of all position descriptions based on your active user type as follows:

Active User Type	Positions in Position Descriptions List
Supervisor	Positions that are direct reports to the Supervisor only.
Department Head/Supervisor	All positions that report to the department the Department Head is assigned to.
Dean / Vice Chancellor	All positions within the School, College, or Division the Dean / Vice Chancellor is assigned to.

In the Position Descriptions view, you can search position descriptions by any number of criteria, including but not limited to position title, position number, employee name, supervisor name, or position status. Searches are fully customizable by position attributes, and you can save custom searches for use again later.

Active user type is Supervisor. Active user type is Supervisor. Cure reared for the supervisor for later use. Active user type is Supervisor. Cure reared for the supervisor for later use. Active user type is Supervisor. Cure reared for the supervisor for later use. Supervisor for later use. Supervisor for later use. Supervisor for later use. Supervisor for later use.	N MANAG
Core Savet       Non saveh refer       Searches are customizable by position attributes and can be saved for later use.       Previous for later use.         Saved or rch: "All Position Descriptions" (104 Items Found) <ul> <li>Previous fold (1000)</li> <li>Previous fold (1000</li></ul>	Descriptio
Saved arch: "All Position Descriptions" (104 Items Found)     Previous 1 2 3 4 Rest     Previous 1 2 3 4 Rest	
Working Position Title         Position Number         Employee First Name         Employee Last Name         Supervisor         Balks           Staffing Services Manager         000016         Tamme         Hill         Human Resources Manager (Linc Burler)         Active           Administrative Support Spec         000018         Beinda         Mackin         Human Resources Manager (Linc Burler)         Active           Human Resources Specialitie         00000         Elser         Jones         Human Resources Specialitie (Ary Braun)         Active           Human Resources Manager         000027         Linc         Burler         Active         Active           Administrike Support Assoc         000027         Linc         Ferstair         Burlers         Divinees Offort (Jacob Teagle)         Active	
Brafing Services Manager     000016     Tammie     Hill     Human Resources Manager (Linc Buller)     Active       Administratus Support Specialist     000014     Beinda     Mackin     Human Resources Manager (Linc Buller)     Active       Human Resources Specialist     000001     Estar     Jones     Human Resources Specialist (Any Braun)     Active       Human Resources Manager     000007     Linc     Beinde     Manare Resources Specialist (Any Braun)     Active       Human Resources Manager     00007     Linc     Beinde     Manare Resources Specialist (Any Braun)     Active       Administratus Support Assoc     000007     Rozolene     Feinstar     Buintess Officer (Jacob Teagle)     Active	Acto
Administrative Support Spec         0000118         Belinda         Macklin         Human Resources Manager (Line Dutier)         Active           Human Resources Speciality         010000         Elser         Jones         Human Resources Speciality (Any Broun)         Active           Human Resources Speciality         000007         Line         Bilder         Active           Administrative Support Assoc         000007         Line         Bilder         Active           Administrative Support Assoc         000007         Rossiene         Fernatar         Business Officer (Jacob Teagle)         Active	Acto
Human Resources Specializit (Any Struct)         Advise           Human Resources Specializit (Any Struct)         Advise           Human Resources Specializit (Any Struct)         Advise           Advise         Buffer         Advise           Advise         Buffer         Advise           Advise         Buffer         Advise	Actor
Human Resources Managar         000027         Lino         Buller         Advise           Administrative Support Assoc         000037         Rozolane         Feimater         Business Officer (Jacob Teagle)         Active	Action (Action Action Action
Administrative Support Assoc 000007 Rozpiere Feimater Business Officer (Jacob Teagle) Active	Actor (Actor Actor Actor Actor
	Actor (Actor Actor Actor Actor Actor
Recruitment Coordinator     00049     Lonnie     Crots     Human Resources Manager (Linc Buller)     Active	Action (Action Action Action Action Action

To initiate the request, select the position number you are modifying by clicking on the Working Position Title of the position.

P	sition Descriptions / SPA	
	SPA Position Descriptions	Create New Position Description
	Open Saved Search v Search: Search More search options	
	To create a new position description, select the option above. To modify an existing position, select it from the list below by clicking on the working title, working title, a position number, or an employee name.	To narrow your search, enter a

Ad hoc Search	All Position Descriptions	8				
Saved Search: "All Position Descriptions" (5 Items Found)						
Working Position Title	Position Number	Employee First Name	Employee Last Name	Supervisor	Status	(Actions)
Human Resources Specialist	010000	SPA	User1	Human Resources Specialist (Amy Braun)	Active	Actions
Administrative Support Spec	000045	Shelby	Clark-Fuller	Human Resources Specialist (Amy Braun)	Active	Actions
Human Resources Specialist	000046	Amy	Braun	Human Resources Manager (Linc Butler)	Active	Actions
Position Management Assistant	001111			Human Resources Specialist (Amy Braun)	Active	Actions
Compensation and Benefits Specialis	1234			Human Resources Specialist (Amy Braun)	Active	Actions

When the position description loads, click on "Modify Position Description" in the menu to the right.

NORTH CAROLINA A&T STATE UNIVERSITY					(Inbox) Watch List	PeopleAdmin POSITION MANAGEMENT V
		Home Position Descriptions	Classifications	My Profile Help		
				Amy Braun, you have 0 messages.	Supervisor	- C logo
sition Descriptions / SPA / Hur	nan Resources Specialist					
Position Desc (SPA) Current Status: Active	ription: Human	Resources Specialist		A Pri	int Preview (Employee 1	View)
Position Desc (SPA) Current Status: Active Position Type: SPA Section/Unit: Compen Benefits & Position In	sation, Ianagement	Resources Specialist		A Pri A Pri ★ Vie ★ Mc	int Preview (Employee 1 int Preview ew Supervisor odify Position Description	View)

You will then be asked to confirm that you are ready to begin working on modifying this position description. The confirmation is important because once you begin work on this position number to revise the description, no other action can be initiated until all required fields are completed and the revised position description is **approved**.

When you have good notes in Word, a document from which to copy, and/or are familiar with the current purpose and duties of the position, click on "Start":



### SHRA Modify - Edit Pending Request Page - General Navigation

After clicking on the "**Start**" button, you will then be taken into the **Position Action Justification tab**, the first information tab that must be completed before the Position Description can be sent to the next step in the approval workflow. Each information tab is listed on the **Edit Pending Request** menu in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while all other tabs will appear as blue links.

You can save the changes you've made to the active tab you're working on and navigate to the next tab in the list simultaneously by clicking the orange "**Next>>**" button located in both the top and bottom right corners of the page. You can save the active tab you're working on and stay on the same tab by clicking the "**Save**" button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column, however this action **WILL NOT** save any changes made to the tab you are navigating away from.

Required fields are highlighted in red and must be filled in before the Position Description can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and  $_{56}$  saved, a Blue Check Circle will appear beside the tab. The Blue Check Circle also appears next to tabs that

do not contain any required fields. (In this example, because the position had been previously approved, the required fields have been completed. It is important to remember to make the necessary revisions to all key fields in a modification action because in many cases, you will not receive "prompts" to update when a field is populated already).



#### SHRA Modify - Saving to Return to a Pending Request Later

Also on the Editing Pending Request Tab List is an important menu item which should be selected if you need to stop a work session on the position description before submitting it to the next level for approval. Following this step will ensure that all your work is saved when you open the request for completion.

- 1) Click the "Save" button located in either the top or bottom right corner
- 2) Select "Pending Request Summary" from the Tab List (illustrated above)
- 3) Select "Keep Working on this Pending Request"

NORTH CAROLINA A&T STATE UNIVERSITY			Imbox         PeopleAdmin           Watch List         POSITION MANAGEMENT         *
	Home Position Descriptions	Classifications   My Profile	Help
			Amy Braun, you have 0 messages. Supervisor 🔹 😋 logou
Modify Position Description Modify Position Description Specialist (SPA) Edit Current Status: Drat	Class & Comp Specialist / Summary		Take Action On Pending Request  WORK-LOW ACTIONS Keep working on this Pending Request
Position Type: SPA Section/Unit: Classification & Compensation	Created by: Amy Braun Owner: Amy Braun		Canceled (move to Canceled) Send to Department Head (move to Department Head) Canceled (move to Canceled)
Summary History Settings			

- 4) Add any Comments into the window that opens (below) as notes, if desired
- 5) Click "Submit"

	Keep working on this Pending	
Modify Position Description: Class & Comp	Request	ke Action On Pending Request 👻
Specialist (SPA) Edit	Comments (optional)	WORKFLOW ACTIONS
		Keep working on this Pending Request
Position Type: SPA Created by: Amy Braun		Canceled (move to Canceled)
Section/Unit: Classification & Owner: Amy Braun Compensation		Send to Department Head (move to Department Head)
		Canceled (move to Canceled)
Summary History Settings	Add this pending request to your watch	
	list?	
Position Action Justification Edit	Submit Cancel	

The **Pending Request** on this position description numbers can be located when you log into the Position Description module again as the same **User Type** you used to begin the action. Hover your cursor over the **Position Descriptions tab** and click on "**SHRA Pending Requests**."

You will then return to the **Position Descriptions view**, which provides a list of all position descriptions based on your active user type, from which you can select this position number as before and continue.

# Modify Position Description: Class & Comp

Edit

Specialist (SPA) Current Status: Draft

Position Type: SPA Section/Unit: Classification & Compensation Description" request already started and saved.

Click on "Edit" to continue work on a "Modify Position

Created by: Amy Braun Owner: Amy Braun

#### **SHRA Modify - Position Action Justification Tab**

The "**Modify Position**" action in PeopleAdmin 7 allows for a variety of actions to be requested and completed. These selections differ based on the classification of the position being modified. At least one option must be selected, but in some cases more than one option will be applicable (For example, if you are building a position description to create a posting for recruitment but also wish to have the career band reviewed for reclassification).

	Home Po	sition Descriptions	Classifications	My Profile	Help		
					Amy Braun, you have 0 messages.	Supervisor	🕶 🖒 logou
ling Requests / / Modify Position Des	cription / Class & Comp Specialist	t / Edit					
Editing Pending Request	Position Action Ju	stification				Save	Next>>
Position Action Justif							
SPA Classification	Check spelling				1. Select the re	ason(s) t	for the
SPA Position Details	* Required Information				modification re	auest.	
Position Funding Infor	Position Action Justificat	tion				questi	
Add ADA Checklist Form	Select the requested po	sition action. If a rec	lassification, level c	nange, or salar	y increase is requested, explain	the factors inf	luencing the
Supplemental Documenta	entered, must reflect a b	proposed effective a pudgeted amount to I	be identified with a	unding source	and is subject to DHR and budg	equested sala	approval
Supervisor	available.						
Employee		Add Position	Details for Posting				
Pending Request Summary		Reclassificati Position Com	ion Review for Career Ba npetency Level Review C	nd Change hange			
	Reason for Position Modification	Career Progr FTE Change Funding Sour Change Repo Abolish Posit	ession Increase Review rce Change orting Relationship (Sup tion anation Required	rvisor or Organiza	tion)	Requi highlig	red fields ghted in RI

Adding details in the **"Explanation of Required Change**" field (illustrated below) will expedite your request by helping other approvers and Human Resources reviewers understand the context for your request.

Remember that the funding source for a budgeted change in the position salary must be identified if you

request an increase. Funding source details are entered on a later tab. As noted, any increase amount is subject to review and approval by the Division of Human Resources.

If you are requesting a reclassification, please enter the current classification in the designated field. Follow any other instructions; then click the Next>> button (located at both top and bottom right corners) to save changes and navigate to the next tab:



## **SHRA Modify - Classification Tab**

If you are <u>**not</u>** requesting a different career band, click on right-hand corner of the page.</u>

If you are requesting a different classification (career band), <u>scroll down below</u> the Selected Classification details and use "Filter these results" to search all position/classification (career band) titles by a key word. Your Class/Comp analyst in DHR can assist you in choosing a career band with related competencies most

ding Requests / / Modify Position Desi	Home Position Descriptions Classifications My P	Navigate to the previous tab by clicking on the "< <prev" button.<="" th=""></prev">
Editing Pending Request	SPA Classification	Save << Prev Next>>
Position Action Justif		
SPA Classification	If you are <u>not</u> requesting a different career band, click on Next>> in the orange	box.
SPA Position Details	If you are requesting a different classification (career band), scroll down below	w the Selected Classification Details and use "Filter these results" to
Position Funding Infor	related competencies most closely matching the revised business needs being	g met by the position.
Add ADA Checklist Form	To view a different classification summary. Click on the arrow by "Actions" to th	e right of any title and select View Classification. Return from the
<ul> <li>Add ADA Checklist Form</li> <li>Supplemental Documenta</li> </ul>	To view a different classification summary, Click on the arrow by "Actions" to th summary using the Back arrow at top left. To <b>select</b> a different proposed class	ne right of any title and select View Classification. Return from the sification and proceed with modifying the position, click on the <b>button</b> to
<ul> <li>Add ADA Checklist Form</li> <li>Supplemental Documenta</li> <li>Supervisor</li> </ul>	To view a different classification summary, Click on the arrow by "Actions" to th summary using the Back arrow at top left. To <b>select</b> a different proposed class the left of the title and select <b>Next&gt;&gt;</b> in the orange box at top or bottom of scree	e right of any title and select View Classification. Return from the sfication and proceed with modifying the position, click on the <b>button</b> to en.
<ul> <li>Add ADA Checklist Form</li> <li>Supplemental Documenta</li> <li>Supervisor</li> <li>Employee</li> </ul>	To view a different classification summary, Click on the arrow by "Actions" to the summary using the Back arrow at top left. To <u>select</u> a different proposed class the left of the title and select <b>Next&gt;&gt;</b> in the orange box at top or bottom of scree If in the process of viewing or changing a job/classification title you open the <b>Classifications</b> tab after provide the information. Class	the right of any title and select View Classification. Return from the sification and proceed with modifying the position, click on the <b>button</b> t en.
<ul> <li>Add ADA Checklist Form</li> <li>Supplemental Documenta</li> <li>Supervisor</li> <li>Employee</li> <li>Pending Request Summary</li> </ul>	To view a different classification summary, Click on the arrow by "Actions" to the summary using the Back arrow at top left. To <u>select</u> a different proposed class the left of the title and select Next>> in the orange box at top or bottom of scree If in the process of viewing or changing a job/classification title you open the CI and need to <u>close</u> the Classifications tab at a more the information. Chan request in progress.	e right of any title and select <b>View Classification</b> . Return from the sification and proceed with modifying the position, click on the <b>button</b> t en. assifications tab, you have opened a new window within the system as this tab will return use to the <b>Desition Descent</b> .
<ul> <li>Add ADA Checklist Form</li> <li>Supplemental Documenta</li> <li>Supervisor</li> <li>Employee</li> <li>Pending Request Summary</li> </ul>	To view a different classification summary, Click on the arrow by "Actions" to the summary using the Back arrow at top left. To <u>select</u> a different proposed class the left of the title and select Next>> in the orange box at top or bottom of scree If in the process of viewing or changing a job/classification title you open the Cl and need to <u>close</u> the Classifications tab attention to the information. Classification for the information of the in	e right of any title and select View Classification. Return from the sification and proceed with modifying the position, click on the button to en. assifications tab, you have opened a new window within the system size this tab will be requested the Bootler Description tab and with nmarizes the current classification's
<ul> <li>Add ADA Checklist Form</li> <li>Supplemental Documenta</li> <li>Supervisor</li> <li>Employee</li> <li>Pending Request Summary</li> </ul>	To view a different classification summary, Click on the arrow by "Actions" to the summary using the Back arrow at top left. To <u>select</u> a different proposed class the left of the title and select Next>> in the orange box at top or bottom of scree of the title and select Next>> in the orange box at top or bottom of scree and need to <u>close</u> the Classifications tab the select of the information Classification Selected Classification Selected Classification of V	e right of any title and select View Classification. Return from the sification and proceed with modifying the position, click on the button to en. assifications tab, you have opened a new window within the system size this tab will be use the Bostler Description the and will nmarizes the current classification's Vork, Competencies, Salary reference
Add ADA Checklist Form     Supplemental Documenta     Supervisor     Employee     Pending Request Summary  Scroll Down below	To view a different classification summary, Click on the arrow by "Actions" to the summary using the Back arrow at top left. To <u>select</u> a different proposed class the left of the title and select Next>> in the orange box at top or bottom of scree of the title and select Next>> in the orange box at top or bottom of scree and need to <u>close</u> the Classifications tab are endeaded to <u>close</u> the Classifications tab are endeaded to <u>close</u> the Classification tab are endeaded to <u>close</u> tab	e right of any title and select View Classification. Return from the sification and proceed with modifying the position, click on the button t en. assifications tab, you have opened a new window within the system size this tab will be used the Bostics Bostics and with nmarizes the current classification's Vork, Competencies, Salary reference level, and Minimum Requirements.
<ul> <li>Add ADA Checklist Form</li> <li>Supplemental Documenta</li> <li>Supervisor</li> <li>Employee</li> <li>Pending Request Summary</li> </ul> Scroll Down below the Selected SHRA	To view a different classification summary, Click on the arrow by "Actions" to the summary using the Back arrow at top left. To <u>select</u> a different proposed class the left of the title and select Next>> in the orange box at top or bottom of screen of the title and select Next>> in the orange box at top or bottom of screen of the title and select Next>> in the orange box at top or bottom of screen of the title and select Next>> in the orange box at top or bottom of screen of the title and select Next>> in the orange box at top or bottom of screen or the title and need to <u>close the Classifications tab</u> at the title selection. This section sum Description of V points for each selection set of the title selection of the title s	e right of any title and select View Classification. Return from the sification and proceed with modifying the position, click on the button t en. lassifications tab, you have opened a new window within the system size the tab with the second the Decision Decision of the second nmarizes the current classification's Vork, Competencies, Salary reference level, and Minimum Requirements.
<ul> <li>Add ADA Checklist Form</li> <li>Supplemental Documenta</li> <li>Supervisor</li> <li>Employee</li> <li>Pending Request Summary</li> </ul> Scroll Down below the Selected SHRA Classification Detail	To view a different classification summary, Click on the arrow by "Actions" to the summary using the Back arrow at top left. To <u>select</u> a different proposed class the left of the title and select Next>> in the orange box at top or bottom of scree of the title and select Next>> in the orange box at top or bottom of scree and need to <u>close the Classifications</u> tables are usual to be the transition of the technication of techni	e right of any title and select View Classification. Return from the sification and proceed with modifying the position, click on the button t en. lassifications tab, you have opened a new window within the system simulation to the contract of the Decision of the system simulation to the contract of the Decision of the system simulation to the contract of the Decision of the system simulation of the contract of the Decision of the system simulation of the contract of the Decision of the System simulation of the Contract of the System simulation of the System of the System simulation of the System simulation of the System of the System of the System simulation of the System of the System of the System of the System simulation of the System of the

located in the orange box at the top

To view a different classification summary, Click on the arrow by "Actions" to the right of any title and select **View Classification**. To return from the summary, use the **Back** button located on the top left corner of your web browser. To **select** a different proposed classification and proceed with modifying the position, click on the **Radio Button** to the left of the title you want to select, and then click on the **Next>>** button located on both the top and bottom right-hand corners of the page.

Clicking on the "Position/Classification Title" will open the "View Classification" page in a new tab within our web browser. After reviewing the classification summary information, you will need to close this tab in order to return to the **SHRA Classification tab** and your request in progress. **PLEASE NOTE**: Clicking on the red "X" on the top right corner of your web browser will <u>close</u> the web browser and **log you out** of the system.

You can navigate to the previous tab by clicking on the grey **<<Prev**" button located between to the Save and Next buttons on the top right-hand corner of the page:



# SHRA Modify - Position Details Tab

Follow the instructions at the top of the page, making sure to fill out all required fields highlighted in **RED**, and then click the orange "**Next>>**" button to save changes and navigate to the next tab.

Please note that the <u>first</u> time a position is modified in the system, there will be many required fields, but after a position has been approved, only the fields that <u>need to be revised</u> will have to be identified for editing.

Editing Pending Request	SPA Position Details		Save << Prev Next>>
Position Action Justif			
SPA Classification			
SPA Position Details	Enter new data only into those fields which you are requesting	to change by submitting this actio	n.
Position Funding Infor	* Required Information		
Add ADA Checklist Form	Contact Information		
Supplemental Documenta	* Contact Name	This field is required.	who should be contacted if there
Supervisor	* Contact Dhane Number	This field is serviced	are questions about the request?
Employee	Contact Phone Number	This field is required.	
Pending Request Summary	* Contact Email	This field is required.	
	Proxy (For Leave Reporting)	This field is required.	Who is the proxy for leave
	* Proxy Phone Number	This field is required.	reporting approvals?
	* Drovu Email	This field is serviced	

Emj	ployee First Name Incumbent First Name Incumbent Last Name	Current Employee's Information will be loaded here, or position will show "Vacant."
Ban SPA C Pos Titk Job	Inner ID 950000000 Classification Information sition/Classification e Administrative Support Assoc	Current Classification Title or Classification Title just selected for modification review will show here.
Rec Lev	ruested Competency Please select Contributing prile Journey a Advanced	inter current competency level, or <u>requested</u> level if a hange is being requested.
Position O The competency p appropriate to the prior to approval I • Primary Purpose of Position	profile linked to this page wil e position. Requested Classif by DHR.	Detailed information in the Position Overview and Position Information sections assist the DHR Class & Comp Analyst in performing an accurate analysis of the position.
Primary Function of		The Primary Purpose provides a basis for the recruitment posting.
		The Organizational Unit information should include factors such as
Position Information		department size, (number of
* Working Position Title Administration	tive Support Spec	degrees offered, and operating or
Building and Room No.		grant budgets) which are helpful to an analyst for determining a
Work Hours: From * [time] to [time] on [days of week]	This field	s required.
* Hours per Week (##) This fi	ield is required.	If Time-Limited Full Time or Part Time is selected
* Appointment Type Please set	lect	as Appointment Type, the budget end date for
If Time Limited, Appointment Length left blank if	ed, please indicate budget end date. If funded the "Time Limited" field above is checked sele	rom more than one fund, indicate earliest end date. This field cannot be exted."
Current Budgeted \$40.000 Salary		Indicates current budgeted salary in position

### SHRA Modify – Position Details Tab – Competencies and Related Job

**Duties** The next section of the Position Details tab is used to build **current duties and responsibilities** into the position. It is the *most important section* of a position description request, but easily missed by first-time users. Please read and follow all instructions in this area to ensure that your position description request is not delayed by providing too little information about the job duties.

On an SHRA position **at least three of the competencies** required by the career band profile must be used to structure the position description and link the duties being performed to the classification/career band's functional competency areas. If desired and relevant, all of the listed competencies may be used.

After identifying the first competency area from the "Competencies" list relevant to the job, click on the key button, "Add Competencies and Related Job Duties Entry." A pull-down list of all SHRA competencies will allow you to select one from the list related to this career band. Type in duties and examples of assigned work relevant to that competency, and assign an approximate percentage of all <sup>61</sup> work time spent

on those duties. Repeat these steps at least three times to capture the most important duties assigned to the position, those on which the employee will be evaluated.

Competences from (	Classification	
Competencie <u>s are kn</u> competencie of a position <b>Use</b>	owledge, skills, and abilities that are required in the position to meet business needs. A specific group of e demonstrated on the job and are utilized in the development only the competencies listed here.	
Using only toose co competencie require	mpetencies listed be w, describe the major job duties of the position related to at least three of the d in the selected caree band.	
Competencies	Verbal Communication, Written Communication, Office Technology, Work Coordination, Problem Solving, Program Knowledge, Information/Records Administration, Budgeting	
Competency Profil [link to OSP]	e http://www.osp.state.nc.us/Guide/CompWebSite/Profiles/Admin%20Support%20Associate%20profile.pdf	
Competencies and F	telated Job Duties	
To enter the job dutie to job functions. You total percentage of tir Unless job duties an	s, please click the "Add Competencies and Related Job Duties Entry" button. Reperville to scroll back down to this section with each addition to enter a competencies and reallocated for all the tasks and responsibilities must equal 100% The described in three competency areas, the system will prevent submission of the entry areas are required.	
Add Competencies an	d Related Job Duties Entry	
Competency	s in three competency areas, the system will prevent submission of this request.	:t <u>.</u>
Describe the specific job duties related to this competency	Describe specific job duties related to com	petency <u>.</u>
Percentage Of Time	Indicate percentage of time spent performing duties de	scribed.
Add Competencies and Related Job D	manare percentage of time opent performing duttes de	

# SHRA Modify – Position Details – Compliance and Requirements

Completing the final position details fields identifies all required and preferred qualifications.



ls this position considered an essential position? Minimum Experience/Education	Please select This field is required. Bachelor's degree; or an equivalent combination of training and experience. All degrees must be received from appropriately accredited institutions.	Information from this section is used to populate the job posting when it is time to recruit.
Preferred Years Experience, Skills, Training, Education		
Required License or Certification		
Valid NC Driver's License required?	Please select This field is required.	
Commercial Driver's License Required?	Please select v This field is required.	
Physical Required? List any other medical/drug tests	Please select This field is required.	Complete this page by clicking on Save and Next>>

# **SHRA Modify - Position Funding Information Tab**

In the **Funding Source Details** section of this tab, you will confirm existing or enter new fund sources to support the request. If you are modifying a position to change the funding source, you will need to type over any existing fund, account, program and org codes to replace the numbers with new codes. Click on the **Add Funding Source Details Entry** button to enter budget and other required codes. Select "Save" after each entry. PLEASE NOTE: The annual amount budgeted must equal the requested salary.

If you are unsure of what fund to use, the most up to date information may be found in **Banner Finance** on these forms:

- 1) FTVORGN- Provides a list of Org Codes
- 2) FTVFUND- Provides a list of Funds
- 3) **FTVACCT** Provides a list of Accounts

These forms show listings of all active funds. For additional help, refer to the Banner Training Guide.

This section functions like the "Competencies and Related Job Duties" section in that each time you click to add another entry, you are taken up to the top of the funding information page. If you are revising or adding more than one funding source, you will need to scroll down below the first entry to revise or enter the second. If the position has more than one funding source, click on the **Add Funding Source Details Entry** button and "Save" until all sources have been entered. Once all funding sources have been added, click "Next>>" to move to the next tab:





### SHRA Modify - Add ADA Checklist Form Tab

The ADA checklist is used to determine the general physical requirements, physical activities, visual acuity, and working conditions of positions in order to be compliant with the provisions of the Americans with Disabilities Act of 1990.

When *modifying* a position in the system the first time, all required sections must be completed. Subsequent modifications to the position may or may not require revision of the ADA requirements.

Check each box that corresponds with the physical aspects of the essential functions of the position, then click "Next>>" to move to the next tab. All 4 fields are required and include:

- The physical activity of the position (Check all that apply and at least one)
- The physical requirements of the position (Select one from the drop down list)
- The visual activity requirements including color, depth perception, and field of vision (Check all that apply and at least one)
- The condition the worker will be subject to in the position (Check all that apply and at least one)





### **SHRA Modify - Supplemental Documents Tab**

The **Supplemental Documents** Tab allows you to upload documents as attachments that will route with the request through the approval workflow. Attachments can be uploaded as follows:

- Upload New: Choose this option if you want to upload a file from your computer.
- **Create New**: Choose this option if you want to create a new file to attach using the PeopleAdmin editor.
- **Choose Existing**: Choose this option is you want to attach a file that has already been uploaded into PeopleAdmin as part of another action.
- Add by URL (For Organizational Charts Only): Choose this option if you wish to link to a file on the web by its URL.

The **Organizational Chart** is required. Position requests will be returned to the Initiator if a current organizational chart is not attached. If a Budget Revision Form is needed to support the request, you can download it from the Budget Revision Form is needed to support the request, you can download it from the Budget and Planning Web Site (http://www.ncat.edu/research/documents/dored-documents/research-services-documents/budget-revise.xlsx) complete it, save it, and select "Upload New" as the option under Actions.

Excel and Word documents may be attached. PDF conversion must be completed for the document to be valid when applicable:

g Requests 1	1 Administrative Support Assoc			Linc Butler, you have 0 mess	apes Supervisor	• ¢	ł
Editing Pending Request	Supplemental Doc	uments			Same CorPan	Next	
Position Action Justif	Consecutional Chart is R	an ined Doubton services	uil he returned	to ballator if a manad out chart is not attach	ed H Budset Reason	Form in	
SPA Classification	needed to support action	download it from the Bud	get and Plannin	g Web Site (http://www.ncat.edu/research/d	ocuments/dored-	r sent is	
SPA Poston Details	documents/tesearch-serv	nces-documents/budget-re	rvise xlax ), con	splete it, save it, and select "Upload New" as	the option under Actio	005	
Position Funding Infor.	Excel and Word documer	nts may be attached.					
Add ADA Checklist Form	PDF conversion must be	completed for the docume	nt to be valid w	hen applicable			
Supplemental Documents	Document Type N	ame Status (Actions)			1999-112-0 article 1990-0		1
Supervisor	Organizational Chart	AcSont+	_	Click "Actions", then sele	ect Upload No	ew,	I
Pending Request Summary	Budget Revision Form Other Document Post Doctoral Evaluation	Upload New Create New Choose Estating Add by URL		Create New, Choose Exis URL in order to upload an	ting, or Add I n attachment	by t.	

#### SHRA Modify - Supervisor Tab

The **Supervisor Tab** allows you to select the position to which your new position will report. If you are not editing from an existing position, use **"Filter these results"** to search all supervisors by a key word. **PLEASE NOTE:** The selection list of supervisors is dependent on the POSITION TYPE (SHRA or EHRA) being created. To select a supervisor in a different Position Type (for example EHRA supervising SHRA), click on "Filter these results" and select the <u>Position Type</u> to which the supervisor of the position belongs. Then click on

"Search" to access the list of supervisors in the selected Position Type.

To view one of the position descriptions in the list, click on the **"Actions"** link next to the classification title you want to view and select **"View"**, or click on the **Working Position Title.** To return from the summary, use the Back button located on the top left corner of your web browser. To **select** a position description to which your new position will report and proceed with creating the position description, click on the **Radio Button** to the left of the position description you want to select, then and click on the orange **Next>>** button located on both the top and bottom right-hand corners of the page.

**REMEMBER:** The positions that appear in this list are based on your active user type (Supervisor, Department Head, Dean / Vice Chancellor):



# SHRA Modify - Pending Request Summary Tab

The **Pending Request Summary Tab** allows you to perform a final review all of the position information you've entered on the previous tabs prior to sending the request to the next step in the approval workflow.

Please review the details of the position summary carefully before continuing. The **Blue Circle Check** appears by those tabs for which all required information has been entered:

	Home Position Descriptions	Classifications	My Profile Help		
			Linc Butler, you have	) messages. Supervisor	💌 C logout
Pending Requests / / Modify Position Description	/ Administrative Support Assoc / Summary				
Modify Position Description Assoc (SPA) Edit Current Status: Drat	on: Administrative Support		Take Actio	n On Pending Request ¥	
Position Type: SPA Section/Unit: Classification & Compensation	Created by: Amy Braun Owner: Amy Braun				
Summary History Settings					
Position Action Justification     Position Action Justification	Click "Edi	t" to make	edits to a tab.		
i for New	Additional workload in the area of classification necessitated the creation of an additional post	n and compesnation has ition.			
Blue Circle Check	Currently: blank				
e Date	08/01/2013				
	Currently: blank				
Requested Salary	\$55,000				

An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save"**, and then return to the **Pending Request Summary Tab** by clicking on the link in the left column:

SPA Position Details Edit	Click "Edit" to make edits to a tab.	
Orange Circle Exclamation Point Email		
Proxy (For Leave Reporting)		
Proxy Phone Number		
Proxy Email		
SPA Classification Information		
Position/Classification Title	Admin Support Associate	
Job Code	10421	
Requested Competency Level		
Position Overview		

Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example, the appropriate routing action is **"Send to Department Head (Move to Department Head)"**:

North Carolina	Inbox	PeopleAdmin
ART STATE UNIVERSITY	Watch List	POSITION MANAGEMENT V
Home Position Descriptions Classifications My Profile Pending Requests / / Modify Position Description / Administrative Support Assoc / Summary	Help Linc Butler, you have 0 messages. Supe	ervisor 💽 C logout
Modify Position Description: Administrati Assoc (SPA) Edit Current Status: Drat Position Type: SPA Section/Unit: Classification & Created by: Amy Braun Demar: Amy Braun Benefits & Position Management Summary History Settings	Take Action On Pending Requ WORKFLOW ACTIONS Keep working on this Pendin Request Canceled (move to Cancelec Send to Department Head) Canceled (move to Cancelec	est v g j) nove to j)
Position Action Justification Edit		
Position Action Justification		

You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send the action to the next level in the approval workflow, click the **"Submit"** button:



If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation.

The physical activity of this po	sition (Check all that apply and at least one)" is required and All required fields must be set before transit	ioning.
NORTH CAROLINA A&T STATE UNIVERSITY		Watch List
	Home Position Descriptions Classifications   My Profile Help	

Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

${f \widehat{j}}$ Pending Request was successfully transitioned, and it was added to your watch list	L.					
NORTH CAROLINA A&T STATE UNIVERSITY		Home	Position Descriptions	Classifications	My Profile	Help
Green confirmation bar indicating the Pending						
Request was successfully transitioned and						
added to your Watch List.						

The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

# **Modify Position Description – EHRA**

IMPORTANT NOTE: If the Modify action is being used to build an existing vacant position into People Admin 7 in order to initiate recruitment, the budgeted available amount will be confirmed in the approval process. If the Modify action is being used to request an increase or change in funding, identify a funding source PRIOR TO the initiation of the request. Budgeted funds are subject to review and approval.

To initiate a Modify Position Description request for an EHRA position, first switch to the Position Management module using the drop down menu located in the top right corner of the

				Click on Position Management.	Inbox Watch List	PeopleAdmin APPLICANT TRACKING POSITION MANAGEMEN	Ţ
Home	Postings	Hiring Proposals	My Pr	ofile Help Linc Butler, you have	e 0 messages. Supe	ervisor 💌 C	logout
							_

Once in the Position Management module, make sure you have the necessary active user type. Remember: only Supervisor, Department Head, and Dean/Vice Chancellor user types can initiate a Modify Position Description request:

		(Inbox) Watch List	PeopleAdmin POSITION MANAGEMENT ▼
Home Position Descript	First select the appropriate user type: Supervisor, Department Head, <u>or</u> Dean /Vice Chancellor.	r, <b>John Supe</b>	ervisor C logout
ment and Position Manageme	ent System	button.	

Next, hover your cursor over the Position Descriptions tab and click on "EHRA":

A&T STATE UNIVERSITY	Watch List POSITION MANAGEMENT
Home Position	Descriptions Classifications   My Profile Help
SPA SPA Pen FPA	Inding Requests Hover cursor over Position
EPA Pen Welcome to your Online Recruitment and Posi Post Doc Post Doc	Descriptions tab and click ctoral ctoral Pending Requests

You will then be taken to the **Position Descriptions** view, which provides a list of all position descriptions based on your active user type as follows:

Active User Type	Positions in Position Descriptions List
Supervisor	Positions that are direct reports to the Supervisor only.
Department Head	All positions that report to the department the Department Head is assigned to.
Dean / Vice	All positions within the School, College, or Division the Dean / Vice Chancellor is
Chancellor	assigned to.

In the Position Descriptions view, you can search position descriptions by any number of criteria, including but not limited to position title, position number, employee name, supervisor name, or position status. Searches are fully customizable by position attributes, and you can save custom searches for use again later.

4	NORTH CAROLINA AAT STOTE UNIVERSITY			Caso People Caso Postro	Admin N MANAGEMEN
EP	Descriptions / EPA A Position Descriptions	HODE	Acti Sup	Supervisor ervisor.	C C
ist	Open Saved Saveth + Search	iptions by	Search More search splors	Searches are customizable by position attributes and can be saved for later use.	ar, or
Adi	hoc Search Po Save Learch: "Position Des	criptions" (6 Items Found)			Actions
	Working Position Title	Position Number	Department Intercolaciate Athlatics	Position/Classification Title	(Actions)
23					Actions v
	DHR EPA Position Test 1	12345	Student Affairs	Admissions Officer	Actions*
	DHR EPA Position Test 1 Director	12345	Student Affairs Compensation, Benefits & Position Management	Admissions Officer Director	Actions* Actions* Actions*

To initiate the request, select the position number you are modifying by clicking on the Working Position Title of the position.

	ns / EPA						
EPA Pos	ition Descriptio	ons				Create New Pos	ition Description
Open Sav	ed Search 🔻 Sea	rch:		Search More search o	ptions		
To create a working title	new position descripti e, a position number, or	on, select the option above r an employee name.	. To modify an existing position, se	lect it from the list below t	by clicking on the wo	king title. To narrow your se	arch, enter a
Save	d Search: "Ad hoc S	Search" (868 Items Four	nd) 🔊				Actions
<ul> <li>Save</li> </ul>	d Search: <b>"Ad hoc \$</b>	Search" (868 Items Four ← Pr	nd) 🔞 evious 1234567	892829	Next →		Actions
<ul> <li>Save</li> <li>Working P</li> </ul>	d Search: <b>"Ad hoc \$</b>	Search" (868 Items Four ← Pr Position Number	nd) 💿 evious 1 2 3 4 5 6 7 Employee's Name	8 9 28 29 Supervisor	Next → Status	Last Updated	Actions (Actions)
<ul> <li>Save</li> <li>Working P</li> <li>Chancellor</li> </ul>	d Search: <b>"Ad hoc \$</b> osition Title (Professor	Search" (868 Items Four ← Pr Position Number 000002	nd) 💿 evious 1 2 3 4 5 6 7 Employee's Name	8 9 28 29 Supervisor	Next → Status Active	Last Updated	Actions (Actions) Actions •
<ul> <li>Save</li> <li>Working P</li> <li>Chancellor</li> <li>Assistant T</li> </ul>	d Search: <b>"Ad hoc S</b> osition Title (Professor o Chancellor	Search" (868 Items Four ← Pr Position Number 000002 000003	nd) 😧 evious 1 2 3 4 5 6 7 Employee's Name	8 9 28 29 Supervisor	Next → Status Active Active	Last Updated	Actions (Actions) Actions • Actions •
<ul> <li>Save</li> <li>Working P</li> <li>Chancellor</li> <li>Assistant T</li> <li>VC Dev. an</li> </ul>	d Search: <b>"Ad hoc S</b> osition Title (Professor o Chancellor d Univ Relations	Search" (868 Items Four ← Pr Position Number 000002 000003 000005	nd) 😧 evious 1 2 3 4 5 6 7 Employee's Name	89 2829 Supervisor	Next → Status Active Active Active	Last Updated	Actions (Actions) Actions • Actions •
<ul> <li>Save</li> <li>Working P</li> <li>Chancellor</li> <li>Assistant T</li> <li>VC Dev. an</li> <li>Vice Chancel</li> </ul>	d Search: "Ad hoc S osition Title (Professor o Chancellor d Univ Relations rellor Bus and Finance	Search" (868 Items Four ← Pr Position Number 000002 000003 000005 000005	nd) 💿 evious 1 2 3 4 5 6 7 Employee's Name	89 28 29 Supervisor	Next → Status Active Active Active Active	Last Updated	Actions (Actions v Actions v Actions v Actions v
Save     Working P     Chancellor     Assistant T     VC Dev an     Vice Chance     General CC	d Search: "Ad hoc S psition Title Professor o Chancellor of d Univ Relations ellor Bus and Finance unsel	Search" (868 Items Four ← Pr Position Number 000002 000003 000005 000005 000006 000010	nd) 💿 evious 1 2 3 4 5 6 7 Employee's Name	8 9 28 29 Supervisor	Next → Status Active Active Active Active Active Active Active	Last Updated	Actions (Actions) Actions • Actions • Actions • Actions •

When the position description loads, click on "Modify Position Description" in the menu to the right.

Position Descriptions / EPA / Assistant Director				
Position Description: A	ssistant Director (EPA) Edit		Take Action On Position Description •	
Position Type: EPA Section/Unit: Director Athletics	Created by: System Account		Print Preview (Employee View) Print Preview View View Supposer	
			Modify Position Description	

If you have good notes in Word, a document from which to copy, and/or are familiar with the current purpose and duties of the position, click on "Start":



## **EHRA Modify - Edit Pending Request Page - General Navigation**

After clicking on the "**Start**" button, you will then be taken into the **Position Action Justification tab**, the first information tab that must be completed before the Position Description can be sent to the next step in the approval workflow. Each information tab is listed on the **Edit Pending Request** menu in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while all other tabs will appear as blue links.

You can save the changes you've made to the active tab you're working on and navigate to the next tab in the list simultaneously by clicking the orange "**Next>>**" button located in both the top and bottom right corners of the page. You can save the active tab you're working on and stay on the same tab by clicking the "**Save**" button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column, however this action **WILL NOT** save any changes made to the tab you are navigating away from.

Required fields are highlighted in red and must be filled in before the Position Description can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a Blue Check Circle will appear beside the tab. The Blue Check Circle also appears next to tabs that do not contain any required fields. (In this example, because the position had been previously approved, the required fields have been completed. It is important to remember to make the necessary revisions to all key fields in a modification action because in many cases, you will not receive "prompts" to update when a field is populated already).



### **EHRA Modify - Saving to Return to a Pending Request Later**

Also on the Editing Pending Request Tab List is an important menu item which should be selected if you need to stop a work session on the position description before submitting it to the next level for approval. Following these steps will ensure that all your work is saved when you open the request for completion.

- 1) Click the "Save" button located in either the top or bottom right corner
- 2) Select "Pending Request Summary" from the Tab List (illustrated above)
- 3) Select "Keep Working on this Pending Request"
- 4) Add any Comments into the window that opens (illustrated below) as notes to yourself, if desired
- 5) Click "Submit"

Home Position	n Descriptions Classifications   My Profile	Нер
		Amy Braun, you have 0 messages. Supervisor 🔹 🕑 logout
Pending Requests / / Modify Position Description / Assistant Director / Summary		
Modify Position Description: Assistant Director (EPA) Edit Current Status: Draft Position Type: EPA Section/Unit: Director Athletics Created by: Amy Braun	or 🗖	Keep working on this Pending Request         Canceled (move to Canceled)
Home POSIT	Ion Descriptions   My	Prolile Help Amy Braun, you have 0 messages. Supervisor
	Take Action	
Modify Position Description: Assistant Direc (EPA) Edit Current Status: Draft	Keep working on this Pending Request	Take Action On Pending Request +
Position Type: EPA Created by: Amy Braun Section/Unit: Director Athletics Owner: Amy Braun		
Summary History Settings	.ii.	
Position Action Justification Edit	list?	
	Submit Cancel	
Reason for Position		

The **Pending Request** on this position description numbers can be located when you log into the Position Description module again as the same **User Type** you used to begin the action. Hover your cursor over the **Position Descriptions tab** and click on **"SHRA Pending Requests."** 

You will then return to the **Position Descriptions view**, which provides a list of all position descriptions based on your active user type, from which you can select this position number as before and continue.

	Modify Position Description: Assistant Director	
	(EPA) Edit Current Status: Draft	Click on "Edit" to continue work on a "Modify Position Description" request already started and saved.
	Position Type: EPA Section/Unit: Director Athletics	Created by: Amy Braun Owner: Amy Braun
# **EHRA Modify - Position Action Justification Tab**

The "**Modify Position**" action in PeopleAdmin 7 allows for a variety of actions to be requested and completed. These selections differ based on the classification of the position being modified. At least one option must be selected, but in some cases more than one option will be applicable (For example, if you are building a position description to create a posting for recruitment but also wish to change the EHRA Title or Rank).



Adding details in the "**Explanation of Required Change**" field (illustrated below) will expedite your request by helping other approvers and Human Resources reviewers understand the context for your request.

Remember that the funding source for a budgeted change in the position salary **must be identified** if you request an increase. Funding source details are entered on a later tab. As noted, any increase amount is subject to review and approval by the Division of Human Resources.

If you are requesting an **EHRA Title Change**, please note the current title in the designated field. Follow any other instructions; then click the orange "**Next>>**" button (located at both top and bottom right corners) to save changes and navigate to the next tab:



# **EHRA Modify - Classification Tab**

If you are <u>not</u> requesting a change in EHRA title with this request,

click at the top right-hand corner of the page.

If Title is not changing, click here

located in the orange box

Next>>

Editing Pending Request	Classification Save <- Prev Next>>
Position Action Justif	Kuuu ara natiraguanting o ahango in CDA tila with this regressitialistic on the ergono (Mautho Y
Classification	I you are not requesting a change in EPA lue with this request, click on the brange "Next>2"
Position Details	If you are requesting an EPA Title Change, scroll down below the Selected Classification De specific title by key word. The Position/Classification title selected bere may be a more gene
Position Funding Infor	button to the left of any Title and then SAVE to select it. After selecting a saving a title, proc
Add ADA Checklist Form	If in the process of viewing or changing a job/classification title you open the Classifications tao, you nave opened a new window within the system
EPA Designation Reques	and need to <u>close</u> the Classifications tab after reviewing the information. Closing this tab will return you to the Position Descriptions tab and your request in progress.

If you are requesting an **EHRA Title Change**, <u>scroll down</u> below **the Selected Classification Details** and select "**Filter these Results**" to search for a specific title by key word. The Position/Classification title selected here may be a more general title than the Position Working Title. Click the selection button to the **SAVE** to select it. After selecting a saving a title, proceed by clicking Next>>

If there is no established EHRA Position/Classification Title which fits the role of the position you are modifying, select "**New Title**." An appropriate Position Title and Code will be assigned to the position by DHR based on a review of its duties.

Supplemental Documenta	Selected Classification				
Supervisor	Selected Classification				
Employee	EPA Classification Detai	ls			
Pending Request Summary	EPA Classification Information	on			
	Position/Classification	Assistant Direc	tor		
	Job Code	82229			
	EPA Position Type	EPANFac			
	EPA Eclass	EN	l lso this filtor to soar	ch FHRA Position/	
ck the radio	Classifications - Filter these results		Classification Titles b	y key words; i.e.,	
tton next to the			Associate .	Ad hoc Search	Ø
A class title you nt to select,	Ad hoc Search				
n click "Savo"	Position/Classification	EPA E-class	EPA Position Type	Job Code	(Actions)
I CIICK Save	Associate Director	EN	EPANFac	81185	Actions <b>v</b>
	Associate Dean	F2	Fac11/12	80836	4 - 10 - 10 - 10
					Actions
ext>>	Associate Administrator	EN	EPANFac	81635	Actions
ext>>	<ul> <li>Associate Administrator</li> <li>Associate Dean/Assoc Professor</li> </ul>	EN F2	EPANFac Fac11/12	81635 82324	Actions▼ Actions▼

If in the process of viewing or changing a job/classification title you open the **Classifications** tab, you have opened a new window within the system and need to <u>close</u> the Classifications tab after reviewing the information. Closing this tab will return you to the **Position Descriptions** tab and your request in progress. **PLEASE NOTE**: Clicking on the red "X" on the top right corner of your web browser will <u>close</u> the web browser and **log you out** of the system.

You can navigate to the previous tab by clicking on the grey **<<Prev**" button located between to the Save and Next buttons on the top right-hand corner of the page (illustrated above).

# **EHRA Modify - Position Details Tab**

Please note that the <u>first</u> time a position is modified in the system, there will be many required fields, but after a position has been approved, only the fields that <u>need to be revised</u> will have to be identified for editing.

ending Requests / / Modify Position Descrip	tion / Assistant Director / Edit			
Editing Pending Request	Position Details			Save <pre><pre> <pre> <p< th=""></p<></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre>
<ul> <li>Position Action Justif</li> <li>Classification</li> <li>Position Details</li> </ul>	Check spelling  Enter new data only into those	e fields which you are requesting to	o change by submitti	ing this action.
Position Funding Infor	* Required Information			
Add ADA Checklist Form	Contact Information			Who should be contacted if there
EPA Designation Reques	* Contact Name		This field is	
Supplemental Documenta				are questions about the request?
<ul> <li>Supervisor</li> </ul>	Contact Phone Number		This field is	s required.
Employee	* Contact Email		This field is	s required.
Pending Request Summary	Proxy (For Leave Reporting)	If the requested position will become required.	a leave-reporting posi	tion (11/12 month or EPA Staff appointment), the proxy fields are
	Proxy Phone Number			If the position is a 12 month leave
	Proxy Email			reporting position, enter proxy for
	Employee Information			leave approval
	Employee First Name	Incumbent First Name		
	Employee Last Name	Incumbent Last Name		Current Employee's Information
	Banner ID	95000000		
	Faculty Rank (if applicable)	Please select	T	show "Vacant." Rank will load in
Current Title or	Classification Information			with faculty positions; if posting
Classification	<ul> <li>Position/Classification</li> <li>Title</li> </ul>	Associate Director		for a different rank, please change.
for modification	Job Code	81185		in non racarcy, skip tins neidi
	EPA Position Type	EPANFac		
review will show	Desition Oversion			
here.	Position Overview			
etailed information in	Primary Purpose of Position			The Primary Purpose provides a basis for the recruitment posting.
d Position Overview d Position formation sections				The Organizational Unit informati should include factors such as
sist the DHR Class &	Primary Function of Organizational Unit			department size, (number of
mp Analyst in				employees/students, programs,
rforming an accurate				degrees offered, and operating or
alysis of the position.	Position Information			grant budgets) which are helpful t
-	* Position Working Title	Assistant Director		an analyst for determining a
	Position Number	008063		position's scope.
	Building and Room No.			If Time Limited Full Time or Port Time is
	* Appointment Type	Please select - This	s field is required.	selected as Appointment Type, the budge
	If Time Limited, Appointment Length	If time limited, please indicate bud	get end date. If funde	end date for the earliest fund to end mus

# EHRA Modify – Position Details Tab – Primary Responsibilities and

**Duties** The next section of the Position Details tab is used to build **current duties and responsibilities** into the position. It is the *most important section* of a position description request, but easily missed by first-time users. Please read and follow all instructions in this area to ensure that your position description request is not delayed by providing too little information about the job duties.

On an EHRA position **at least one of** the three categories of Instructional, Research, and Administrative must be selected to describe the primary responsibilities of the job. Many EHRA jobs may be comprised of a combination of duties in more than one of these categories, but entry of only one will meet the minimum requirement for a job description.

To enter duties, click on the key button, "Add Primary Responsibilities and Duties Entry." A pull-down list of the three categories will allow you to select the primary function first. Type in duties and examples of assigned work relevant to the primary function, and assign an approximate percentage of all work time spent on those duties. If desired, repeat these steps to add categories in order to capture the most important duties assigned to the position.

**Please Note**: Each time the "Add Entry" button is clicked; you are taken back to the top of the Position Details Tab and will need to <u>scroll down</u> through the other sections again to see then location to add the new entry.

**IMPORTANT:** Completion of at least one entry is required in order to move this request to the next step in the approval workflow. The total percentage of time allocated for all categories should equal 100%:

Add Primary Responsibilities Supervisory	Please select This field is required.	Click here to add the major responsibilities and duties -
* Does this position supervise?	HELP TEXT: Supervisory positions conduct interviews, ma supervision, develop work plans and conduct performance following:	ake final hiring decisions, provide salary recommendations, m e appraisals for PERMANENT employees. If this position perf
Number of Permanent Employees this Position Supervises		
Percent of Time Spent		
Add Primary Responsibilities and D Primary Responsibilities and D Describe the major responsibili	nsibilities and Duties Entry op uties	pens this section to enable entry of duties:
Add Primary Responsibilities and D Primary Responsibilities and D Describe the major responsibili Duties Entry" button. Repeat for addition to enter a new categor Function	uties ties and duties using the three categories of Instr r each category relevant to job functions. Compl y and add job duties. The total percentage of tim sase select T	Dens this section to enable entry of duties: uructional, Research, and Administrative. To enter duties please click the "Add Primary Responsibiliti letion of at least one entry is required. You will need to scroll back down to this section with ea the allocated for all categories should equal 100% Select function from the drop down list.
Add Primary Responsibilities and D Primary Responsibilities and D Describe the major responsibili Duties Entry" button. Repeat fo addition to enter a new categor Function Pl Describe the specific tasks and responsibilities related to the function.	uties ties and duties using the three categories of inst r each category relevant to job functions. Compl y and add job duties. The total percentage of time case select T	Dens this section to enable entry of duties: ructional, Research, and Administrative. To enter duties please click the "Add Primary Responsibilitie letion of at least one entry is required. You will need to scroll back down to this section with ea te allocated for all categories should equal 100% Select function from the drop down list. Describe specific tasks and responsibilities related to the function.

# **EHRA Modify – Position Details – Compliance and**

**Requirements** Completing the final position details fields identifies all required and

	preferred qualifications.	
Supervisory		
Does this position supervise?	Please select This field is required. HELP TEXT: Supervisory positions conduct interviews, make imar mining occisions, provide salary recommendations, momitor and assign work, counsel and discipling employees under direct supervision, develop work plans and conduct performance appraisals for PERMANENT employees. If this position performs ALL of the ABO supervisory responsibilities, please indicate the following:	e VE
Percent of Time Spent	If Yes, then complete these fields	
Number of Permanent Employees this Position Supervises		
Athletics		
Is this position assigned to the department of of Athletics or involved or associated with athletics, including but not limited to, responsibility for admission, certification of academic standing, evaluation of academic performance and administration of financial aid for student athletes?	Please select This field is required. Question is required to ensure NCAA compliance.	•
Requirements and Preferences Is this position considered an essential position?	es Information from this section is used to populate the job posting when it is time to recruit.	
Minimum Ba Experience/Education All	achelor's degree; or an equivalent combination of training and experience. Il degrees must be received from appropriately accredited institutions.	
Preferred Years Experience, Skills, Training, Education	×	
Required License or Certification		
* Valid NC Driver's License required?	Please select This field is required.	
* Commercial Driver's License Required?	Please select This field is required.	
* Physical Required?	Please select This field is required.	
List any other medical/drug tests required	on Save and Next>>	
	Save << Prev	Next >>

#### **EHRA Modify - Position Funding Information Tab**

In the **Funding Source Details** section of this tab, you will confirm existing or enter new fund sources to support the request. If you are modifying a position to change the funding source, you will need to type over any existing fund, account, program and org codes to replace the numbers with new codes. Click on the **Add Funding Source Details Entry** button to enter budget and other required codes.

If you are unsure of what fund to use, the most up to date information may be found in **Banner Finance** on these forms:

- 1) FTVORGN- Provides a list of Org Codes
- 2) **FTVFUND** Provides a list of Funds
- 3) FTVACCT- Provides a list of Accounts

These forms show listings of all active funds. For additional help, refer to the Banner Training Guide. Select "Save" after each entry. PLEASE NOTE: The annual amount budgeted must equal the requested salary.

This section functions like the "Competencies and Related Job Duties" section in that each time you click to add another entry, you are taken up to the top of the funding information page. If you are revising or adding more than one funding source, you will need to scroll down below the first entry to revise or enter the second. If the position has more than one funding source, click on the **Add Funding Source Details Entry** button and "Save" until all sources have been entered. Once all funding sources have been added, click "Next>>" to move to the next tab:



#### EHRA Modify - Add ADA Checklist Form Tab

The ADA checklist is used to determine the general physical requirements, physical activities, visual acuity, and working conditions of positions in order to be compliant with the provisions of the Americans with Disabilities Act of 1990.

When *modifying* a position in the system the first time, all required sections must be completed. Subsequent modifications to the position may or may not require revision of the ADA requirements.

Check each box that corresponds with the physical aspects of the essential functions of the position, then click "Next>>" to move to the next tab. All 4 fields are required and include:

- The physical activity of the position (Check all that apply and at least one)
- The physical requirements of the position (Select one from the drop down list)

- The visual activity requirements including color, depth perception, and field of vision (Check all that apply and at least one)
- The condition the worker will be subject to in the position (Check all that apply and at least one)





#### **EHRA Modify - Designation Request Form Tab**

Complete the EHRA Designation Request Form <u>only when</u> modifying a position for review of EHRA Category change; for example, Instructional, Research, and Public Service position being converted to SAAO or a change in SAAO tier. These types of title changes will be reviewed by Classification and Compensation to determine compliance with N.C.G.S. 126, 116 and UNC Policy 300.1.1. Please note the specific organizational chart requirements below. For more information about EHRA non-faculty definitions, see http://www.northcarolina.edu/hr/hrab/HRAB\_Submission\_Process\_2-2013.pdf. Once complete, click

	Home	Position Descriptions	Classifications	My Profile	Help		
					Linc Butler, you have 0 messages	Supervisor	▼ C logou
nding Requests / / Modify Posi	ition Description / Assist	ant Director / Edit					
Editing Pending Request	EPA Designation	Request Form				Save << Prev	Next >>
Position Action Justif	ARC Chook applling						
Classification				<i>c u</i>			
Position Details	determine compliance v	ignation Request Form with N.C.G.S. 126, 116	and UNC Policy 300	/ non-faculty po .1.1. Please no	isition for review by Classificatio te the specific organizational cha	n and Compensatio art requirements be	n to Iow. For
Position Funding Infor	more information about	EPA non-faculty defini	tions, see http://www	.northcarolina.e	edu/hr/hrab/HRAB_Submission_	Process_2-2013.pd	íf
Add ADA Checklist Form	This form is only necess	sary on a position modi	fication if the change	in responsibilit	ies would place the position in a	different EPA cate	jory.
EPA Designation Reques	Request Details						
Supplemental Documenta	Institution				Enter Unive	rsity inform	ation.
<ul> <li>Supervisor</li> </ul>	monution						
Pending Request Summary	Division/School/Col	lege					
	Department						
	EPA Designatior Requested	Please select			EHRA	t reque designa	sted Ition
	Proposed Position Inf	formation			from	the drop d	own
					list.		

Proposed Position Informa	ntion	Complete all fields.
Proposed Title		
Proposed Working Title (if different)		
Proposed Position Number		
Proposed JCAT Code		Select current position status from the drop down list.
Current Status	Please select	
Current Position Information	on (If Applicable)	Complete all fields.
Current Title		
Name of Employee in Position		
Name and Title of Supervisor		
Institutional Authorization (	(HR Use Only)	This section will be completed by HR.
Division of Human Resource specific reference to relevat position titles, position num	ces will electronically submit completed form with the following the elements in SAAO definition or Instructional/Research de abers, position designations (SPA, EPA, SAAO), and employed the elements of the elements of the element of the elements of the element of the elements of the e	ing required documentation: -A written justification for requested action to include efinitionsA detailed position descriptionAn organizational chart that includes yee names. *As defined by SAAO Policy, paragraph I.A or I.B
Print Name		
Title		
Electronic Signature of HR Analyst via Email Submission		
		Save << Prev Next >>

## **EHRA Modify - Supplemental Documents Tab**

The **Supplemental Documents** Tab allows you to upload documents as attachments that will route with

the request through the approval workflow. Attachments can be uploaded as follows:

- Upload New: Choose this option if you want to upload a file from your computer.
- **Create New**: Choose this option if you want to create a new file to attach using the PeopleAdmin editor.
- **Choose Existing**: Choose this option is you want to attach a file that has already been uploaded into PeopleAdmin as part of another action.
- Add by URL (For Organizational Charts Only): Choose this option if you wish to link to a file on the web by its URL.

The **Organizational Chart** is required. Position requests will be returned to the Initiator if a current organizational chart is not attached. If a Budget Revision Form is needed to support the request, you can download it from the Budget Revision Form is needed to support the request, you can download it from the Budget and Planning Web Site (http://www.ncat.edu/research/documents/dored-documents/research-services-documents/budget-revise.xlsx) complete it, save it, and select "Upload New" as the option under Actions.

Excel and Word documents may be attached. PDF conversion must be completed for the document to be valid when applicable:



#### **EHRA Modify - Supervisor Tab**

The **Supervisor Tab** allows you to select the position to which your new position will report. If you are not editing from an existing position, use **"Filter these results"** to search all supervisors by a key word. **PLEASE NOTE:** The selection list of supervisors is dependent on the POSITION TYPE (SHRA or EHRA) being created. To select a supervisor in a different Position Type (for example EHRA supervising SHRA), click on "Filter these results" and select the <u>Position Type</u> to which the supervisor of the position belongs. Then click on "Search" to access the list of supervisors in the selected Position Type.

To view one of the position descriptions in the list, click on the "Actions" link next to the classification title you want to view and select "View", or click on the Working Position Title. To return from the summary, use the Back button located on the top left corner of your web browser. To select a position description to which your new position will report and proceed with creating the position description, click on the Radio Button to the left of the position description you want to select, then and click on the orange Next>> button located on both the top and bottom right-hand corners of the page.

**REMEMBER:** The positions that appear in this list are based on your active user type (Supervisor, Department Head, Dean / Vice Chancellor):

Pending Requests / / Modify Po	Home Position	Descriptions	Classifications   My Profile H	Navigate to the pre clicking on the "<<	evious tab by Prev" button.
Editing Pending Request	Supervisor			Save	<< Prev Next >>
Position Action Justif     Classification     Position Details	Position Descriptions - Filter	these results 🔶	Search all positi clicking on "Filte	on descriptions by er these results".	ptions O
Click the radio button next to the	<ul> <li>Saved Search: "Positi Working Position Title</li> </ul>	tion Description Position Number	is" (6 items Found) Department	Position/Classification Title	(Actions)
position description you want to select, then click	EPA Position - 2     DHR EPA Position Test 1     Director     Assistant VC for HR     AVC for Student Affairs	76767 12345 22233	View the position of summary by clickin then "View" or by o	lescriptions g on "Actions", clicking on the title.	Actions + Actions + Mctions + Actions + Actions +
"Next>>".	Assistant Vice Chancellor for Development	44444	Compensation, Benefits & Por Management	ilion Asst Vice Chanc Stu Dev	Actions

#### **EHRA Modify - Pending Request Summary Tab**

The **Pending Request Summary Tab** allows you to perform a final review all of the position information you've entered on the previous tabs prior to sending the request to the next step in the approval workflow.

Please review the details of the position summary carefully before continuing.

The **Blue Circle Check** appears by those tabs for which all required information has been entered:

	Home Position Descripti	ons Classifications	My Profile	Help			
				Linc Butler, you have 0 messages	Supervisor	• C	logout
Pending Requests / / Modify Position Description	on / Assistant Director / Summary						
1				Take Action On Pend	na Request 💌		
Modify Position Description	Assistant Director				ng Nequest +		
(EPA) Edit							
Current Status: Draft							
Position Type: EPA Cr Section/Unit: Director Athletics Or	eated by: Amy Braun when: Amy Braun						
	,						
Summary History Settings	Reports						
Position Action Justification		Edit" to mak	o odito	to a tab			
Paritian Action Justification	CIICK	Eult to mak	e euits				
Position Action Justification							
pr New	Additional workload in the area of classif	fication and compesnation has					
Blue Cirele Cheek	Currently: blank	n position.					
Blue Circle Check	08/01/2013						
Date	Currently: blank						
	\$55.000						
Requested Salary							

An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save"**, and then return to the **Pending Request Summary Tab** by clicking on the link in the left column:



Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example, the appropriate routing action is **"Send to Department Head (Move to Department Head)"**:

North Carolina A&T State University			(Inbo Watch Li	PeopleAdmin           st         POSITION MANAGEMENT ▼
H	ome Position Descriptions Class	sifications   My Profile	Help	
Pending Requests / / Modify Position Description / Assista	nt Director / Summary		Linc Butler, you have 0 messages.	Supervisor 💌 🕈 logout
Modify Position Description: Ass (EPA) Edit Current Status: Draft Position Type: EPA Created b Section/Unit: Director Athletics Owner: Ar Summary History Settings Report	Click on "Take Action Request", then select Department Head" to request to the next st approval workflow.	On Pending Send to The move the The move the	Ake Action On Pending WORKFLOW ACTIONS Keep working on this Po Request Canceled (move to Can Send to Department Head) Canceled (move to Can	Request • ending celed) ad (move to celed)
Position Action Justification Edit Position Action Justification				

You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send the action to the next level in the approval workflow, click the **"Submit"** button:

Take Action	×		
Send to Department Head (mo Department Head) Comments (optional)	ove to		
	Comments viewed by in the Histo	are optional and can be the next level approver ory tab.	
Add this pending request to your list?	watch	Adding the action to you List allows you to easily t monitor the action's prog	r Watch rack and gress.
Submit	Cancel //		

If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation.

•	The physical activity of this posi	ition (Check all tha	t apply and	d at least one)" is require	d and All required f	ields must be s	et before transit	ioning.
	A&T STATE UNIVERSITY							Watch List
			Home	Position Descriptions	Classifications	My Profile	Help	

Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

Pending Request was successfully transitioned, and it was added to your watch list	t.					
A&T STATE UNIVERSITY						
		Home	Position Descriptions	Classifications	My Profile	Help
Green confirmation bar indicating the Pending						
Request was successfully transitioned and						
added to your Watch List.						
New Position Description: test (SPA) Current Status: Department Head						

The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

#### Modify Position Description – Post Doctoral

Prior to requesting a reappointment for a Postdoctoral Associate position, Principal Investigators (PI) should review the <u>Postdoctoral Scholars Policy</u>. Approval for post doctoral reappointments positions must be granted by the Vice Chancellor for the Division of Research and Economic Development (DORED) before initiating a request in this system.

To request a postdoc's reappointment, the PI must complete and submit to the Vice Chancellor for Research the following: (1) a completed and signed original Postdoctoral Hiring Authorization Form, (2) a copy of the Postdoctoral Reappointment Letter, and (3) a copy of the Postdoctoral Scholar Annual Evaluation Form. These documents can be attached to the Supplemental Documentation tab through this system.

To initiate a Modify Position Description request for an Post Doctoral position, first switch to the Position Management module using the drop down menu located in the top right corner of the page:

Hame	Postings		Click on Position Management.	Inbox Watch List	PeopleAdmin APPLICANT TRACKING POSITION MANAGEMENT
Home	Postings		Abolghasem Shahbazi, you ha	ave 0 messages.	Supervisor 👻 logout (ash)

Once in the Position Management module, make sure you have the necessary active user type. Remember: only Supervisor, Department Head, and Dean/Vice Chancellor user types can initiate a Modify Position Description request:

		Inbox PeopleAdmin Watch List POSITION MANAGEMENT V
Home Position Descriptions Class	sifications   My Profile Help Abolghasem Shahbazi, you have	e 0 messages, Supervisor 🗸 🕑 logout (ash)
	First select the appropriate user type: Supervisor, Department Head, <u>or</u> Dean /Vice Chancellor.	Then click on the Refresh

Next, hover your cursor over the **Position Descriptions** tab and click on "Post Doctoral":

North Carolina A&F State University				(Inbox) Watch List	PeopleAdmin POSITION MANAGEMENT
Home	Position Descriptions	Classifications	My Profile Help		
	SPA		Abolghasem Shahba	zi, you have 0 messages.	Supervisor - C logout
	SPA Pending Requests				
	EPA				
	EPA Pending Requests				
Welcome to your Online Recruitment and	Post Doctoral				
,	Post Doctoral Pending Reque	sts			

You will then be taken to the **Position Descriptions** view, which provides a list of all position descriptions based on your active user type as follows:

Active User Type	Positions in Position Descriptions List
Supervisor	Positions that are direct reports to the Supervisor only.
Department Head	All positions that report to the department the Department Head is assigned to.
Dean / Vice	All positions within the School, College, or Division the Dean / Vice Chancellor is
Chancellor	assigned to.

In the **Position Descriptions** view, you can search position descriptions by any number of criteria, including but not limited to position title, position number, employee name, supervisor name, or position status. Searches are fully customizable by position attributes, and you can save custom searches for use again later.

		Home Position Des	criptions Classifications	My Profile	Help		_	
				Abolg	<b>ghasem Shahbazi</b> , you have 0 me	essages. Supervis	🗸 🕑 logo	
ition Descriptions / Post Doctor	ral						<b>_</b>	
Post Doctoral Position Descriptions			Active user type is Supervisor, Department Head/Supervisor, or Dean/Vice Chancellor					
Open Saved Search 🔻	Search:		Search	More search opti He list below by	Searches are cu position attribu saved for later	ustomizabl utes and ca use.	e by in be	
List of position	n descript	ions assigned	, , , , , , , , , , , , , , , , ,					
to your user ty	/pe and o	rg group					Actions	
Working Position Title	Position Number	Employee First Name	Employee Last Name	Status	Department	Section/Unit	(Actions)	
Post Doc Reseach Assoc	009755	Shuangning	Xiu	Active	Bioenergy Center	Bioenergy Center	Actions	
Post Doc Research Assoc	009775	Vishwanath	Deshmane	Active	Bioenergy Center	Bioenergy Center	Actions <b>v</b>	
Post Doctoral Research	010000			Active	Bioenergy Center	Bioenergy Center	Actions <b>v</b>	

To initiate the request, select the position number you are modifying by clicking on the Working Position Title of the position.

osition Descriptions / Post Doctor	al						
Post Doctoral Posit	tion Descripti	ons				Create New Position D	escription
Open Saved Search v	Search:		Search	Nore search options			
To create a new position de working title, a position num Ad hoc Search	escription, select the ober, or an employed	e option above. To modify an exis e name.	ting position elect it from the	e list below by clicking	g on the working title. To	narrow your search, e	enter a
Ad hoc Search (3 Items Found) Save this search?							
Working Position Title	Position Number	Employee First Name	Employee Last Name	Status	Department	Section/Unit	(Actions)
Post Doc Reseach Assoc	009755	Shuangning	Xiu	Active	Bioenergy Center	Bioenergy Center	Actions •
Post Doc Research Assoc	009775	Vishwanath	Deshmane	Active	Bioenergy Center	Bioenergy Center	Actions v
Post Doctoral Research Associate	010000			Active	Bioenergy Center	Bioenergy Center	Actionsv

When the position description loads, click on "Modify Position Description" in the menu to the right.

Position Description: Post Doctoral Research Associate (Post Doctoral) Associate (Post Doctoral) Current Status: Active	Research	4	Print Preview (Employee View) Print Preview
Position Type: Post Doctoral Section/Unit: Bioenergy Center	Click here to initiate the request.	*	View Supervisor Modify Position Description
Summary History			

When you have documents from which to copy, and/or are familiar with the current purpose and duties of the position, click on "Start":



# Post Doctoral Modify - Edit Pending Request Page - General Navigation

After clicking on the "**Start**" button, you will then be taken into the **Position Action Justification tab**, the first information tab that must be completed before the Position Description can be sent to the next step in the approval workflow. Each information tab is listed on the **Edit Pending Request** menu in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while all other tabs will appear as blue links.

You can save the changes you've made to the active tab you're working on and navigate to the next tab in the list simultaneously by clicking the orange "**Next>>**" button located in both the top and bottom right corners of the page. You can save the active tab you're working on and stay on the same tab by clicking the "**Save**" button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column, however this action **WILL NOT** save any changes made to the tab you are navigating away from. Required fields are highlighted in red and must be filled in before the Position Description can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a Blue Check Circle will appear beside the tab. The Blue Check Circle also appears next to tabs that do not contain any required fields. (In this example, because the position had been previously approved, the required fields have been completed. It is important to remember to make the necessary revisions to all key fields in a modification action because in many cases, you will not receive "prompts" to update when a field is populated already).

Required fields are highlighted in **red** and must be filled in before the Position Description can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check Circle** also appears next to tabs that do not contain any required fields.

Tab list	errinting / Bost Partneyl Basaarch Associate / Edit					
Editing Pending Request	Position Action Justification	Save and Next buttons				
Position Action Justif	Check snelling					
Classification     Classification     Details     Pesition Funding Infor     Actir ADA Checklist Form	Indicates missing information needed to complete position description					
<ul> <li>Supplemental Documenta</li> </ul>	The proposed effective date must be a future date, subject to ch amount to be identified with a funding source and is subject to D	ange based on date of hire. The requested salary must reflect a budgeted available HR and budget review and approval.				
Supervisor     Employee     Pending Request Summary	To stop and return to request later, select					
Blue Check Circle	"Pending Request Summary"	tto DORED				

## Post Doctoral Modify - Saving to Return to a Pending Request Later

Also on the Editing Pending Request Tab List is an important menu item which should be selected if you need to stop a work session on the position description before submitting it to the next level for approval. Following these steps will ensure that all your work is saved when you open the request for completion.

- 1) Click the "Save" button located in either the top or bottom right corner
- 2) Select "Pending Request Summary" from the Tab List (illustrated above)
- 3) Select "Keep Working on this Pending Request"

A&T STATE UNIVERSITY	r					Watch List	POSITION MANAGEMENT
		Home	Position Descriptions	Classifications	My Profile Help		
					Abolghasem S	Shahbazi, you have 0 messages.	Supervisor 👻 logou
ding Requests / / Modify	Position Description	on / Post Doctoral Resea	arch Associate / Summary				
iding Requests / / Modify	Position Description	on / Post Doctoral Resea	arch Associate / Summary				
Modify Positi	on Description	in / Post Doctoral Resea	arch Associate / Summary			Take Action On Pending Req	quest 🔻
Modify Positi Research Ass	on Description Description	tion: Post Doctoral Resea tion: Post Doc st Doctoral) E	toral			Take Action On Pending Req WORKFLOW ACTIONS Keep working on this Pend	iuest 🕶
Modify Positi Research As: Current Status: Draft	on Description Description	ti <b>on: Post Doctoral Resea</b> ti <b>on: Post Doc</b> st Doctoral) E	rrch Associate / Summary toral dit			Take Action On Pending Req WORKFLOW ACTIONS Keep working on this Pend Request	iuest v
Modify Positi Research As: Current Status: Draft Position Type: Post D	on Description Description Description Description Description Sociate (Postociate (Postociate Postociate Post	tion: Post Doctoral Resea tion: Post Doc: st Doctoral) E Created by: Abolg	toral dit hasem Shahbazi		_	Take Action On Pending Req WORKFLOW ACTIONS Keep working on this Pend Request Canceled (move to Cancele	quest ▼ ling ed)
Modify Positi Research As: Current Status: Draft Position Type: Post D Section/Unit: Bloene	Position Description on Descrip sociate (Po- loctoral rgy Center	tion: Post Doctoral Resea tion: Post Doc st Doctoral) E Created by: Abolg Owner: Abolghase	toral dit hasem Shahbazi m Shahbazi		_	Take Action On Pending Req WORKFLOW ACTIONS Keep working on this Pend Request Canceled (move to Cancele Send to Department Head ) Department Head	uest ▼ ling ed) (move to

4) Add any Comments into the window that opens (illustrated below) as notes to yourself, if desired5) Click "Submit"

Requests / / Modify Position Description / Post Doctoral Research Assoc	Take Action	Aboignasem Snanbazi, you nave o messages. Supervi
Modify Position Description: Post Doctoral Research Associate (Post Doctoral) Edit Current Status: Draft	Keep working on this Pending Request Comments (optional)	Take Action On Pending Request +
Position Type: Post Doctoral Created by: Abolghasem SI Section/Unit: Bioenergy Center Owner: Abolghasem Shaht		
Summary History Settings	Add this pending request to your watch list?	
Position Action Justification Edit	Submit Cancel	
Position Action Justification		

**Pending Request** on this position description numbers can be located when you log into the Position Description module again as the same **User Type** you used to begin the action. Hover your cursor over the **Position Descriptions tab** and click on "**SHRA Pending Requests**."

You will then return to the **Position Descriptions view**, which provides a list of all position descriptions based on your active user type, from which you can select this position number as before and continue.

Modify Position Description Research Associate (Post Current Status: Draft	on: Post Doctoral t Doctoral) Edit
Position Type: Post Doctoral Section/Unit: Bioenergy Center	Created by: Abola asem Shahbazi Click on "Edit" to continue work on a "Modify Position
Summary History Settings	Description" request already started and saved.

The

### Post Doctoral Modify - Position Action Justification Tab

The "**Modify Position**" action in PeopleAdmin 7 allows for a variety of actions to be requested and completed. In the Post Doctoral classifications, "modify position" is used for reappointments, assigning additional duties, funding extensions and funding source changes. At least one option must be selected, but in some cases more than one option will be applicable (For example, if you are reappointing a post doc for a second year but need to change the funding source).

Editing Pending Request	Position Action Justification	Save Next>>
Position Action Justif Classification	<sup>™</sup> <u>Check spelling</u> ▼	
Position Details	To request a post doctoral reappointment, the , Principal Investigator (PI) must submit this action with (1) Letter and (2) a copy of the Postdoctoral Scholar Annual Evaluation Form attached electronically to the S Chancellor for the Division of Research and Economic Development will initially approve any reappointment	a copy of the Postdoctoral Reappointment supplemental Documents tab. The Vice ent and forward the request to the Division of
Add ADA Checklist Form	Human Resources.	on and formate the request to the principal of
Supplemental Documenta	The proposed effective date must be a future date, subject to change based on date of hire. The requ amount to be identified with a funding source and is subject to DHR and budget review and approval.	1. Select the reason(s) for th
Supervisor	* Required Information	modification request
Employee	Position Action Justification	mounication request.
r enung ruquest Sulfilliary	Add Position Details for Posting     Reappointment     End Appointment, Return Position # to DORED     Funding Source Change     Reappointment Extension Exception (DORED Approved)     Change Reporting Relationship (Supervisor or Organization)	

Adding details in the "**Explanation of Required Change**" field (illustrated below) will expedite your request by helping other approvers and Human Resources reviewers understand the context for your request.

Remember that the funding source for a budgeted change in the position salary **must be identified** if you request an increase. Funding source details are entered on a later tab. As noted, any increase amount is subject to review and approval by the Division of Human Resources.

If you are requesting a reclassification, please enter the current classification in the designated field. Follow any other instructions; then click the orange "**Next>>**" button (located at both top and bottom right corners) to save changes and navigate to the next tab:



# Post Doctoral Modify - Classification Tab

A post doctoral reappointment does not change the position title/classification. To continue, click on

Next>>	at top right			
			Click Here to continue.	
Pending Requests	/ / Modify Position Des	cription / Post Doctoral Research Associate / Edit		
Editing Pe	ending Request	Classification		
Desition	Action Justif		Save CCPIEV Next>	
e Position	ACTOLI JUSTI	A post doctoral reappointment does not change the position title/classification. To continue, click	on the orange "Next>>"	
Classific	cation	Selected Classification		
Position	Notaile	Selected Glassification		

#### **Post Doctoral Modify - Position Details Tab**

Please note that the <u>first</u> time a position is modified in the system, there will be many required fields, but after a position has been approved, only the fields that <u>need to be revised</u> will have to be identified for editing.

Follow the instructions at the top of the page, making sure to fill out all required fields highlighted in **RED**, and then click **Next>>** at top or bottom right of page to save changes and navigate to the next tab:

ng Requests / / Modify Position Des	scription / Post Doctoral Research As:	sociate / Edit	
Editing Pending Request	Position Details		Save << Prev Next>>
Position Action Justif     Classification	Check spelling  Enter new data only into thos	e fields which you are requesting to chang	ge by submitting this action.
Position Details	* Required Information		
	Contact Information		
Add ADA Checklist Form		4	Who should be contacted if there
Supplemental Documenta	* Contact Name		are questions about the request?
Supervisor	* Contact Phone Number		are questions about the request:
Employee			
Pending Request Summary	Contact Email		Who is the provu for loove
	Proxy (For Leave Reporting)		who is the proxy for leave
	neporting	•	reporting approvals?
	* Proxy Phone Number		
	* Proxy Email		
	Employee Information		Current Employee's Information
	Employee First Name		will be loaded here or position will
	Employee Last Name		show (Vecent //
	Banner ID		snow vacant.
	Damerib		
	Classification Information		Detailed information in the Position
	Position/Classification Title	Post Doc Research Associate	Overview and Position Information
	Job Code	81069	sections assist the DHR Class & Com
	EPA E-class	EN	Analyst in performing an accurate
	Position Overview		analysis of the position.
	<ul> <li>Primary Purpose of Position</li> </ul>	To conduct fundamental research development of advanced thermoc biomass conversion technology f economic production of liquid t fuels and bio-based products.	The Primary Purpose provides a basis for the recruitment posting

Pi O	rimary Function of rganizational Unit	The Biological Engineering Program affiliated with the Department of Natural Resources (School of Agriculture & Environmental Sciences) and Department of Chemical, Biological and Bioengineering (College of Engineering) at North Carolina A&T State University is seeking a Postdoctoral Research Associate in the area of biomass gasification. This position will be supported by the NSF	The Organizational Unit information should include factors such as department size and operating or grant budgets which
Posi	ition Information		are neipful to an analyst for
The appointment	Iorking Position Title	Post Doctoral Research Associate	determining a position's scope.
longth must	osition Number	010000	
indicate the date	uilding and Room No.	Sockwell Hall, Room 107	he appointment type for post- loctoral is always time-limited
supporting the	ppointment Type	Time Limited - Full-time  All Post Doctoral appointments are time limited. Departments sho are completed by budget officers and DHR no later than the estab	uld review the month-end payroll schedule to ensure all approvals lished cut-off period for each month.
(if there are	Time Limited, ppointment Length	06/30/2014 Please indicate budget end date. If funded from more than one	
multiple fund	ppointment Period	Initial Appointment - 1st year	the drop down menu.
sources) ends.	urrent Budgeted alary	\$60,000	· · ·

#### Post Doctoral Modify – Position Details Tab – Primary Responsibilities

The next section of the Position Details tab is used to build **current duties and responsibilities** into the position. It is the <u>most important section</u> of a position description request, but easily missed by first-time users. Please read and follow all instructions in this area to ensure that your position description request is not delayed by providing too little information about the job duties.

On a post doctoral position, at **least one of** the three categories of Instructional, Research, and Administrative must be selected to describe the primary responsibilities of the job. Entry of only one will meet the minimum requirement for a job description.

To enter or revise duties, click on the key button, "**Primary Responsibilities and Duties Entry**." A pulldown list of the three categories will allow you to select the primary function first. Type in duties and examples of assigned work relevant to the primary function, and assign an approximate percentage of all work time spent on those duties. If desired, repeat these steps to add categories in order to capture the most important duties assigned to the position.

**Please Note**: Each time the "Add Entry" button is clicked; you are taken back to the top of the Position Details Tab and will need to <u>scroll down</u> through the other sections again to see then location to add the new entry.

**IMPORTANT:** Completion of at least one entry is required in order to move this request to the next step in the approval workflow. The total percentage of time allocated for all categories should equal 100%:

Primary Responsibilities and Duties					
Describe the major responsibilities and duties please click the "Add Primary Responsibilities after each category is added. <b>At least one en</b> t	using the three categories of Instructional, Research, and Administrative. To enter duties and Duties Entry" button. Repeat for each category relevant to job functions and SAVE try is required to complete a position description request				
If the position requires duties in more than a si	ngle category, you will need to scree Link to sample Post Doc position description	on.			
and job duties. The total percentage of time allocated for all categories should equal 100%					
A sample Post Doctoral Scholar position descr	intion is available for your reference at this link: http://www.ncat.edu/hr/documents/post-				
A sample Post Doctoral Scholar position descr doc/pd_job_description_template.doc. You ma	ription is available for your reference at this link: http://www.ncat.edu/hr/documents/post- iy copy and paste wording from this template into the "Primary Responsibilities and Duties				

A sample Post Doctoral Sc doc/pd_job_description_ter Entry."	nolar position desenplate.doc. You m section to ad	Primary Responsibilities Entry "button opens this d or edit job duties.
Describe the specific tasks and	The successful candidate must be independently conduct research or the following subjects: (1) analy gasification chemistry, (2) synge	able to i one or more visis of bion so cleaning d down list.
responsibilities related to the function.	(CFD) modeling of fluidized bed g (4) design and operation of fluid gasifier, and (5) life cycle asse biomass gasification.	Describe or revise specific tasks and responsibilities related to the function.
<ul> <li>Percentage of Time</li> <li>Remove Entry?</li> <li>Add Primary Responsibilities</li> </ul>	100%	Indicate percentage of time spent performing tasks and responsibilities described.

# Post Doctoral Modify – Position Details – Compliance and Requirements

Completing the final position details fields identifies all required and preferred qualifications. After these details are added the first time, they will not usually need to be modified again.



#### **Post Doctoral Modify - Position Funding Information Tab**

In the Funding Source Details section of this tab, you will indicate the funding source(s) for this position. Click on the Add Funding Source Details Entry button to enter budget and other required codes. Select "Save" after each entry. PLEASE NOTE: The annual amount budgeted must equal the requested salary.

If you are unsure of what fund to use, the most up to date information may be found in **Banner Finance** on these forms:

- 1) FTVORGN- Provides a list of Org Codes
- 2) FTVFUND- Provides a list of Funds
- 3) FTVACCT- Provides a list of Accounts

These forms show listings of all active funds. For additional help, refer to the Banner Training Guide.

If the position has more than one funding source, click on the **Add Funding Source Details Entry** button and **"Save"** until all sources have been entered. **PLEASE NOTE:** Each time you add an additional entry, you will need to **scroll down below the last saved entry** to enter a new funding source. Once all funding sources have been added, click **"Next>>"** to move to the next tab:



#### Post Doctoral Modify - Add ADA Checklist Form Tab

The ADA checklist is used to determine the general physical requirements, physical activities, visual acuity, and working conditions of positions in order to be compliant with the provisions of the Americans with Disabilities Act of 1990.

Check each box that corresponds with the physical aspects of the essential functions of the position, then click "**Next>>**" to move to the next tab. All 4 fields are required and include:

- The physical activity of the position (Check all that apply and at least one)
- The physical requirements of the position (Select one from the drop down list)
- The visual activity requirements including color, depth perception, and field of vision (Check all that apply and at least one)
- The condition the worker will be subject to in the position (Check all that apply and at least one)



#### Post Doctoral Modify - Supplemental Documentation Tab

The **Supplemental Documentation Tab** allows you to upload documents as attachments that will route with the request through the approval workflow. Attachments can be uploaded as follows:

- **Upload New:** Choose this option if you want to upload a file from your computer.
- **Create New:** Choose this option if you want to create a new file to attach using the PeopleAdmin editor.
- **Choose Existing:** Choose this option is you want to attach a file that has already been uploaded into PeopleAdmin as part of another action.
- Add by URL (For Organizational Charts Only): Choose this option if you wish to link to a file on the web by its URL.

**The Organizational Chart is required.** Position requests will be returned to the Initiator if a current organizational chart is not attached. If a Budget Revision Form is needed to support the request, you can download it from the Budget and Planning Web Site (http://www.ncat.edu/research/documents/dored-documents/research-services-documents/budget-revise.xlsx), complete it, save it, and select "Upload New" as the option under Actions. Excel and Word documents may be attached. PDF conversion must be completed for the document to be valid when applicable:

For Post Doctoral Reappointments only, (when modifying a post doctoral appointment), the Postdoctoral Scholar Annual Evaluation Form is required as an attachment. A copy of the Post Doctoral Reappointment Letter should also be attached as "Other Document." Links to the form and a template reappointment letter are below. Complete the form or letter, save it, and select "Upload New" as the option under Actions.

Evaluation form: <u>http://www.ncat.edu/hr/documents/post-doc/postdoctoral\_evaluation\_form.doc</u> Reappointment Letter: <u>http://www.ncat.edu/hr/documents/post-</u> doc/pd\_employment\_reappt\_offer\_ltr\_template.doc

Editing Pending Request	Supplemental Documentation	Save << Prev Ne
<ul> <li>Position Action Justif</li> <li>Classification</li> <li>Position Details</li> <li>Position Funding Infor</li> <li>Add ADA Checklist Form</li> </ul>	Organizational Chart is Required. Position request will be to support action, download it from the Budget and Plannin services-documents/budget-revise.xlsx ), complete it, saw For Post Doctoral Reappointments only, (when modifying as an attachment. A copy of the Post Doctoral Reappointment perpointment letter are below. Complete the form or letter	returned to Initiator if a current org chart is not attached. If Budget Revision Form is ner Ig Web Site (http://www.ncat.edu/research/documents/dored-documents/research- e it, and select "Upload New" as the option under Actions. a post doctoral appointment), the Postdoctoral Scholar Annual Evaluation Form is requ nent Letter should also be attached as "Other Document." Links to the form and a tem r, save it, and select "Upload New" as the option under Actions.
Supplemental Documenta	Evaluation form: http://www.ncat.edu/hr/documents/post-d	loc/postdoctoral_evaluation_form.doc
Supervisor	Reappointment Letter: http://www.ncat.edu/hr/documents/	post-doc/pd_employment_reappt_offer_ltr_template.doc
Employee	Excel and Word documents may be attached.	
Pending Request Summary	PDF conversion must be completed for the document to b	Click "Actions", then select Upload New,
	Document Type Name Status (Actions)	Create New, Choose Existing, or Add by
	Organizational Chart Actions •	URL in order to upload an attachment.
	Budget Revision Form Upload New	·
	Other Document Create New	Actio
	Post Doctoral Evaluation Add by URL	Attach a saved copy of the Post Doctoral
	<b>_</b>	Evaluation form when submitting a

#### Post Doctoral Modify - Supervisor Tab

The **Supervisor Tab** allows you to select the position to which your new position will report. If you are not editing from an existing position, use **"Filter these results"** to search all supervisors by a key word. **PLEASE NOTE:** The selection list of supervisors is dependent on the POSITION TYPE (SHRA, EHRA, or Post Doctoral) being created. To select a supervisor in a different Position Type (for example EHRA supervising Post Doctoral), click on **"Filter these results"** and select the **Position Type** (EHRA) to which the supervisor of the position belongs. Then click on **"Search"** to access the list EHRA supervisors.

To view one of the position descriptions in the list, click on the "Actions" link next to the classification title you want to view and select "View", or click on the Working Position Title. To return from the summary, use the Back button located on the top left corner of your web browser. To select a position description to which your new position will report and proceed with creating the position description, click on the Radio Button to the left of the position description you want to select, then and click on the orange Next>> button located on both the top and bottom right-hand corners of the page.

**REMEMBER:** The positions that appear in this list are based on your active user type and the org unit to which you are assigned. (Supervisor, Department Head, Dean / Vice Chancellor):

ting Requests / _ / Modify Position	Home Position Descriptions Class	i <b>fications  </b> My Profile He	Navigate to the previous tab by clicking on the "< <prev" button.<="" th=""></prev">
Editing Pending Request	Supervisor Position Descriptions - Filter these results	Search all positi	Save <prev next="">&gt; on descriptions by</prev>
lick the radio outton next to the position escription you vant to select,	Saved Search: "Position Descriptions" (1     Working Position     Title     Post Doc Resarch Associate     Post Doc Resarch Associate	clicking on "Filte Item Found) View the position of summary by clickin then "View" or by o	er these results".
hen click Next>>".			Save <prev next="">&gt;</prev>
<ul> <li>Position Action Justif</li> <li>Classification</li> </ul>	The Supervisor Tab allows you to select the position to wind these results" to search all supervisors by a key word.	hich your new position will report. If	you are not editing from an existing position, use "Filter
Position Details			

- Position Funding Infor...
- Add ADA Checklist Form
- Supplemental Documenta...

#### Supervisor

Employee
Pending Request Summary

To **select** a position description to which your new position will report and proceed with creating the position description, click on the **Radio Button** to the left of the position description you want to select, then and click on the orange "Next>>" button located on both the top and bottom right-hand corners of the page.

#### Selected Supervisor

-	Search:		
-	Position Type: Add SPA Column: Post Doctoral Post Post Doctoral Department:	Select EHRA as Posi under "Filter These Re different supervisor ne	ition Type esults" if a eeds to be
Position Des	First Name:	assigned	
-	< L	Search Cancel	Ad hoc Search

#### Post Doctoral Modify - Pending Request Summary Tab

The **Pending Request Summary Tab** allows you to perform a final review all of the position information you've entered on the previous tabs prior to sending the request to the next step in the approval workflow. The **Blue Circle Check** appears by those tabs for which all required information has been entered:

		Home	Position Descriptions	Classifications	My Profile	Help		
						Linc Butler, you have 0 messages.	Supervisor	💌 C logout
Pending	Requests / / Modify Position Description / P	ost Doctoral Rese	arch Associate / Summary					
	Modify Position Description Research Associate (Post D Current Status: Draft Position Type: Post Doctoral Section/Unit: Bioenergy Center	n: Post Doc Octoral) E Created by: Abolg Owner: Abolghas	<b>toral</b> idit Ihasem Shahbazi em Shahbazi			Take Action On Pendin	g Request	
	Position Action Justification	Edit	Click "Ed	it" to make	e edits to	o a tab.		
	Blue Circle Check	Test Currently: blank 08/31/2013 Currently: blank						
	Basis for EPA Status	Test						

An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save"**, and then return to the **Pending Request Summary Tab** by clicking on the link in the left column:

9	Position Det	ails <u>Edit</u>	Click "Edit" to make edits to a tab.	
Orang	e Circle	ation		
Exclamat	ion Point	ct Name		
	Contact	Phone Number		
	Con	tact Email		
	Proxy (For	Leave Reporting)		
	Proxy P	hone Number		

Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example, the appropriate routing action is **"Send to Department Head (Move to Department Head)"**:

	Home Position Descriptions	Classifications   My Profile	Help	
			Linc Butler, you have 0 messages. Supervisor	💌 C logout
Pending Requests / / Modify Position Description / Post Doctoral R	esearch Associate / Summary			
Modify Position Description: Post I Research Associate (Post Doctoral) Current Status: Draft Position Type: Post Doctoral Section/Unit: Bioenergy Center Summary History Settings	Click on "Take Action Request", then seloc Department Head" request to the next approval workflow	on on Pending ect "Send to ' to move the t step in the 7.	Take Action On Pending Request  WORKFLOW ACTIONS Keep working on this Pending Request Canceled (move to Canceled) Send to Department Head (move to Department Head) Canceled (move to Canceled)	

You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable in the History tab by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send the action to the next level in the approval workflow, click the "Submit" button:

	Take Action	×			
	Send to Department Head (me Department Head)	ove to			
	Comments (optional)	Comments viewed by in the Histo	are option the next le ory tab.	nal and can be evel approver	
ו has	Add this pending request to your list?	r watch	Adding List allo monito	the action to you ows you to easily t r the action's prop	r Watch track and gress.
	Submit	Cancel //			

If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation

The physical activity of this post	ition (Check all that apply and at least one)" is required and All required fields must be set before transitioning	g.
A&T STATE UNIVERSITY		Watch List
	Home Position Descriptions Classifications   My Profile Help	

Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

	Pending Request was successfully transitioned, and it was added to your watch list		
	A&T STATE UNIVERSITY	Home Position Descriptions Class	sifications   My Profile Help
Π	Green confirmation bar indicating the Pending		
	Request was successfully transitioned and		
	added to your Watch List.		

The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

# Section 3: Applicant Tracking

The Applicant Tracking module provides online access to job postings and applicant information, and allows for managers and supervisors to initiate requests to post permanent SHRA, EHRA, and Post Doc positions for recruitment and initiate hiring proposals. The specific requests and actions that can be initiated in the Applicant Tracking module are:

- Create New Posting
- Review and Ranking of Applicants
- Initiate Hiring Proposal

The only user types that can initiate a **Create New Posting** or a **Hiring Proposal** request are Supervisor, Department Head, and Dean/Vice Chancellor. The only user types that can review and rank applicants are Supervisor, Department Head, Dean/Vice Chancellor, Applicant Reviewer, or Search Committee Member.

#### **Create New Posting – General Navigation**

To initiate a **Create New Posting** request, first switch to the **Applicant Tracking** module using the drop down menu located in the top right corner of the page:

					Inbox Pe	eopleAdmin	
Home	Postings	Hiring Proposals	My Profile	Click on Applicant Tracking.	A	PPLICANT TRACKING OSITION MANAGEME	VT
				Linc Butler, you have 0 r	messages. Supervise	or 💌 C	logout

Once in the **Applicant Tracking** module (header at the top of the screen will be **Blue**), make sure you have the necessary active user type. <u>Remember</u>: only Supervisor, Department Head, and Dean/Vice Chancellor user types can initiate a **Create New Posting** request:

Home Postings Hiring Prop	osals   My Profile Help	Inbox Watch List	PeopleAdmin APPLICANT TRACKING POSITION MANAGEMENT
	First select the appropriate user type: Supervisor, Department Head, <u>or</u> Dean /Vice Chancellor.	Supe	rvisor 💽 C logout
nt and Position Management Syster	n	Then clic button.	ck on the Refresh

Once in the correct user type, you can initiate a **Create New Posting** request by clicking on the appropriate link in the Shortcuts menu for the desired position type for posting (SHRA, EHRA, or Post-

octoral)	Home	Postings	Hiring Proposals	My Profile	Help	
			Lonnie Cr	rotts, you have 4 me	ssages.	Department Head
Welc <mark>o</mark> m	ne to your Online Recruitmen	t and Positi	on Management	t System		Shortcuts menu
4 Ale	rts (2 alerts from the administrator)					Shortcuts
Туре	Message					Create New SPA Posting Create New EPA Posting Create New Post Doctoral Posting
0	Check the module name at top right (A	pplicant Tracking	g or Position Manageme	ent) and change as	5	

You can also initiate a **Create New Posting** request by hovering your cursor over the **Postings** tab and clicking on the desired position type for posting:

ver cursor over Postings tab d click on desired position be for posting (SHRA , EHRA, st Doctoral).	A&T STATE UNIVERSITY					Watch List APPLI	ICANT TRACKING
d click on desired position       SPA       Linc Butler, you have 0 messages. Supervisor         be for posting (SHRA , EHRA, st Doctoral).       EPA         Post Doctoral).       Post Doctoral         Shortcuts       Create New SPA Posting         Create New EPA Posting       Create New EPA Posting         Displaying items for group "Supervisor".       Postings (2)         Postings (2)       Hiring Proposals (0)       Pending Requests (9)         Special Handling Lists (0)       Special Handling Lists (0)	ver cursor over F	Postings tab	Postings Hiring Propos	als   My Profile	Help		
De for posting (SHRA, EHRA, Post Doctoral Post Doctoral Post Doctoral Post Doctoral Post Doctoral Shortcuts Create New SPA Posting Create New Post Doctoral Posting	d click on desired	d position	SPA		Linc Butler, you have (	0 messages. Supervisor	▼ ¢
st Doctoral).         st Doctoral).         St Doctoral).         St Doctoral).         St Displaying items for group "Supervisor".         Postings (2)       Hiring Proposals (0)         Pending Requests (9)       Special Handling Lists (0)	be for posting (SF	IRA , EHRA,	Post Doctoral				
Inbox (11 items need your attention) Displaying items for group "Supervisor". Postings (2) Hiring Proposals (0) Pending Requests (9) Special Handling Lists (0) Shortcuts Create New SPA Posting Create New Post Doctoral Posting	st Doctoral).						
Inbox (11 items need your attention)       Shortcuts         Displaying items for group "Supervisor".       Create New SPA Posting Create New EPA Posting Create New Post Doctoral Posting         Postings (2)       Hiring Proposals (0)       Pending Requests (9)       Special Handling Lists (0)							
Displaying items for group "Supervisor".       Create New SPA Posting Create New EPA Posting Create New Post Doctoral Posting Create New Post Doctoral Posting         Postings (2)       Hiring Proposals (0)       Pending Requests (9)       Special Handling Lists (0)	Welcome to your orm	n <del>o neorannen an</del> d Positi	ion Management System				
Displaying items for group "Supervisor".  Postings (2) Hiring Proposals (0) Pending Requests (9) Special Handling Lists (0)  Create New Post Doctoral Posting		d your attention)	ion Management System		s	Shortcuts	
Postings (2) Hiring Proposals (0) Pending Requests (9) Special Handling Lists (0)	Inbox (11 items need	d your attention)	ion Management System		S	Shortcuts Create New SPA Posting	
	Inbox (11 items need Displaying items for group "Sup	d your attention)	ion Management System			Shortcuts Create New SPA Posting Create New Post Doctoral Posting	

# **Create New SHRA Posting**

To initiate a **Create New SHRA Posting** request, hover your cursor over the **Postings** tab and click on the "SHRA", or click on the **Create New SHRA Posting** link located in the **Shortcuts** menu to the right of your **Inbox**:

A&T STATE UNIVERSITY		Watch List APPLICANT TRACKIN
over cursor over Postings b and click on SHRA.	Postings Hiring Proposals   My P SPA EPA	rofile Help Linc Butler, you have 0 messages. Supervisor 💌 C
	Post Doctoral	
Welcome to your Online Recruitment	and Position Management System	Shortcuts

You will then be taken to the **SHRA Postings** view, which provides a list of all current/pending SHRA postings initiated based on your active user type as follows:

Active User Type	Positions in Position Descriptions List
Supervisor	Current / pending postings for positions that are direct reports to the Supervisor only.
Department Head	Current / pending postings for all positions that report to the department the Department Head is assigned to.
Dean / Vice Chancellor	Current / pending postings for all positions within the School, College, or Division the Dean / Vice Chancellor is assigned to.

In the **SHRA Postings** view, you can search postings by any number of criteria, including but not limited to position title, posting number, position number, department name, supervisor name, or workflow state. Searches are fully customizable by position and posting attributes, and you can save custom searches for use again later:

A AGT STATE UNIVERSITY		Home Pos	stings Hiring Proposals   My P	Profile Help		(Inbox) Peop Watch List APPL	DIEAdmin ICANT TRACKING
SPA Postings				Active u Supervi	iser type is sor.	Supervisor	New Posting
Open Saved Search  Search:		Search More sea	arch options	Searches are	customizabl	e by	
List of current / p SHRA postings by	oending / active		F	oosition attr saved for lat	ibutes and ca er use.	an be	Actions
List of current / p SHRA postings by User type	pending / active Found)	Docition Number	Benattment	saved for lat	ibutes and ca er use.	an be	Actions
List of current / p SHRA postings by SHRA posting by SHRA posti	Poending y active Found) Posting Number SPANS	Position Number	Department Emotives Pelatinos	Active Applications	ibutes and ca er use. Workflow State	Last Updated	Actions (Actions)
List of current / p SHRA postings by SHRA postings by SHRA postings by Working Title Employee Relations Counselor (TLB) Employee Relations Counselor (TLB)	Found) Posting Number SPA035 SPA034	Position Number TLB8 TLB7	Department Employee Relations Employee Relations	Active Applications	ibutes and ca er use. Workflow State Closed	An be Last Updated August 01, 2013 at 03 03 pm August 01, 2013 at 1021 am	Actions (Actions) Actions •
List of current / p SHRA postings by Used Search: Closed Working Tile Employee Relations Counselor (TLB8) Employee Relations Counselor (TLB7) Employee Relations Counselor (TLB7)	Poending y active Found) Posting Number SPA035 SPA034 SPA032	Position Number TLB8 TLB7 TLB78	Department Employee Relations Employee Relations	Active Applications	ibutes and ca er use. Vorkfow State Closed Closed	Last Updated August 01, 2013 at 03.03 pm August 01, 2013 at 10.21 am August 01, 2013 at 03.03 pm	Actions (Actions) Actions • Actions •
List of current / p SHRA postings by SHRA posting	Found)	Position Number TLBS TLB7 TLB7B 001111	Department Employee Relations Employee Relations Employee Relations Classification & Compensation	Active Applications	ibutes and ca er use. Closed Closed	Last Updated           August 01, 2013 at 03.03 pm           August 01, 2013 at 03.03 pm           August 01, 2013 at 03.33 pm           August 01, 2013 at 03.33 pm	Actions (Actions) Actions v Actions v Actions v Actions v
List of current / p SHRA postings by SHRA postings by Vorking Tite Employee Relations Counselor (TLB8) Employee Relations Counselor (TLB7) Employee Relations Counselor (TLB7) Currently Relations Counselor (TLB7) Currently Relations Counselor (TLB7) Currently Relations Counselor (TLB6)	Pending y active Found) Posting Number SPA035 SPA034 SPA032 SPA018 SPA028	Position Number TLB8 TLB7 TLB78 001111 TLB6	Department Employee Relations Employee Relations Classification & Compensation Employee Relations	Active Applications	ibutes and ca er use. Vorkflow State Closed Closed Closed	Last Updated           August 01, 2013 at 03.03 pm           August 01, 2013 at 03.03 pm           July 31, 2013 at 10.21 am           July 31, 2013 at 125 pm           July 31, 2013 at 125 pm	Actions (Actions) Actions v Actions v Actions v Actions v
List of current / p SHRA postings by SHRA postings by Userch: Cosed Victors Working Tile Employee Relations Counselor (TLB7) Employee Relations Counselor (TLB7) Administrative Support Assoc Employee Relations Counselor (TLB6) Administrative Support Assoc	Posting Number SPA036 SPA034 SPA032 SPA038 SPA038 SPA028 SPA028	Position Number TLB8 TLB7 TLB78 001111 TLB5 000051	Department Employee Relations Employee Relations Classification & Compensation Employee Relations Classification & Compensation	Active Applications	ibutes and ca er use. Vorkflow State Closed Closed Closed Closed	Last Updated           August 01, 2013 at 0303 pm           August 01, 2013 at 0303 at 0303 pm           July 31, 2013 at 033 at 033 am           July 31, 2013 at 025 pm           July 31, 2013 at 025 at m	Actions (Actions) Actions • Actions • Actions • Actions • Actions •
List of current / p SHRA postings by User Closed (LES) User Closed (LES) User Closed (LES) Employee Relations Counselor (LES) Employee Relations Counselor (LES) Administrative Support Assoc Employee Relations Counselor (LES)	Pending y active Found) Posting Number SPA035 SPA034 SPA032 SPA018 SPA028 SPA027 SPA022	Position Number TLB8 TLB7 001111 TLB78 000051 TLB5	Department Employee Reliations Employee Reliations Classification & Compensation Employee Reliations Classification & Compensation Employee Reliations	Active Applications	ibutes and ca er use. Vorkflow State Closed Closed Closed Closed Closed Closed	Last Updated           August 01, 2013 at 03 03 pm           August 01, 2013 at 03 03 pm           August 01, 2013 at 00 33 am           July 31, 2013 at 102 52 pm           July 31, 2013 at 105 88 am           July 31, 2013 at 00 15 am           July 31, 2013 at 00 15 am           July 31, 2013 at 00 15 am           July 32, 2013 at 00 221 at 00 22 m	Actions (Actions) Actions + Actions + Actions + Actions + Actions + Actions +
List of current / p SHRA postings by SHRA postings by University of search Closed (CLB) Gradue Relations Counselor (CLB) Counselor (CLB) Administrative Support Assoc Employee Relations Counselor (CLB) Administrative Support Assoc Employee Relations Counselor (CLB) Counselor CLB) Counselor CLB Counselor CLB) Counselor CLB Counselor CLB) Counselor CLB Counselor CLB CLB Counselor (CLB) Counselor CLB) Counselor CLB	Pending y active Found) Posting Number SPA035 SPA034 SPA038 SPA028 SPA028 SPA028 SPA027 SPA022 SPA021	Position Number TLB3 TLB7 TLB7B 001111 TLB6 000051 TLB5 TLB4	Department Employee Relations Employee Relations Classification & Compensation Employee Relations Classification & Compensation Employee Relations Employee Relations	Active Applications	ibutes and ca er use.	Last Updated           August 01, 2013 at 03 03 pm           August 01, 2013 at 03 03 pm           August 01, 2013 at 021 am           July 31, 2013 at 023 at 10.25 pm           July 31, 2013 at 0.915 am           July 30, 2013 at 30.25 pm           July 30, 2013 at 30.24 pm           July 30, 2013 at 30.21 at 10.96 am	Actions (Actions) Actions v Actions v Actions v Actions v Actions v Actions v Actions v Actions v
List of current / p SHRA postings by SHRA postings by Working Tile Employee Relations Counselor (TLB8) Administrative Support Assoc Employee Relations Counselor (TLB7) Administrative Support Assoc Employee Relations Counselor (TLB5) Employee Relations Counselor (TLB5) Employee Relations Counselor (TLB5) Employee Relations Counselor (TLB5) Employee Relations Counselor (TLB5)	Pending y active Found) Posting Number SPA035 SPA034 SPA032 SPA018 SPA028 SPA027 SPA027 SPA027 SPA027 SPA021 SPA017	Position Number TLB8 TLB7 TLB78 001111 TLB6 000051 TLB5 TLB4 TLB3	Department Employee Relations Employee Relations Calastification & Compensation Employee Relations Classification & Compensation Employee Relations Employee Relations Employee Relations	Active Applications	ibutes and ca er use. Vorkilow State Closed Closed Closed Closed Closed Closed Closed Closed	Last Updated           August 01, 2013 at 030 pm           August 01, 2013 at 020 at 030 pm           July 31, 2013 at 102 at 030 at 031 at	Actions (Actions) Actions v Actions v Actions v Actions v Actions v Actions v Actions v Actions v Actions v Actions v
List of current / p SHRA postings by d search: Conseld (LE8) Employee Relations Counseldr (LE8) Employee Relations Counseldr (LE7) Administrative Support Assoc Employee Relations Counseldr (LE6) Administrative Support Assoc Employee Relations Counseldr (LE6) Employee Relations Counseldr (LE6) Employee Relations Counseldr (LE5) Employee Relations Counseldr (LE5) Employee Relations Counseldr (LE9) Administrative Support Assoc	Pending y active Found) Posting Number SPA035 SPA034 SPA035 SPA034 SPA032 SPA032 SPA028 SPA027 SPA027 SPA027 SPA027 SPA027 SPA027 SPA027 SPA027 SPA027 SPA027 SPA027 SPA027 SPA027	Position Number TLB8 TLB7 TLB78 001111 TLB5 000051 TLB5 TLB4 TLB3 001111	Department Employee Relations Employee Relations Employee Relations Classification & Compensation Employee Relations Classification & Compensation Employee Relations Employee Relations Employee Relations Employee Relations	Active Applications	ibutes and ca er use. Vorkfow state Closed Closed Closed Closed Closed Closed Closed Closed Closed Closed	Last Updated           August 01, 2013 at 03.03 pm           August 01, 2013 at 03.03 pm           August 01, 2013 at 03.03 pm           July 31, 2013 at 10.21 am           July 31, 2013 at 10.25 am           July 31, 2013 at 02.91 am           July 32, 2013 at 02.91 am           July 30, 2013 at 10.91 am           July 30, 2013 at 11.00 am           July 30, 2013 at 13.41 pm	Actions (Actions) Actions * Actions * Actions * Actions * Actions * Actions * Actions * Actions * Actions * Actions *

To initiate the request, click on the orange **Create New Position Description** button located on the top right of the screen just below the grey bar:

						Inbox Watch List	PeopleAdmin Applicant tracking	
Home	ostings H	iring Proposals	My Profile	Help	Linc Butler, you have 0 messages.	Supervisor	Ţ. Ċ	logout
					Click here to initiate a Create New Posting request.		Create New Posting	
Search More	search ontions							

You will then see the **Create New** menu, asking what you would like to use to create the new posting:



# Create New SHRA Posting – Create from Posting

Select **Create from Posting** if you have previously posted a position in the PeopleAdmin system and wish to post a position using the same or similar information from that prior posting.

**PLEASE NOTE:** If the position classification and/or the position description details have changed, you must start a Modify Position action in the Position Management module prior to posting the position.

Choosing the **Create from Posting** option copies information from an existing posting into a new posting:



After clicking on **Create from Posting,** you will be taken to the **SHRA Position Descriptions** view, where you can search postings by any number of criteria, including but not limited to position title, posting number, position number, department name, supervisor name, or workflow state. Searches are fully customizable by position and posting attributes, and you can save custom searches for use again later. If you need assistance in finding the desired posting, please contact a Recruitment Coordinator in the Division of Human Resources:

North Carolina Art State University		Home Po	stings Hiring Proposals   My	Profile Help		(nbox) Peo (Watch List) APP	pleAdmin Licant tracking 🔹
Postings / SPA SPA Postings				Active u Supervi	user type is sor.	Supervisor	e New Posting
List of current / p SHRA postings by user type.	pending / active <sup>(Found)</sup>	Search More se	arch options	Searches are position attr saved for lat	e customizabl ibutes and ca er use.	e by Actionan be dow	ons drop n menu.
Working Title	Posting Number	Position Number	Department	Active Applications	Workflow State	Last Updated	(Actions)
Employee Relations Counselor (TLB8)	SPA035	TLB8	Employee Relations	1	Closed	August 01, 2013 at 03:03 pm	Actions
Employee Relations Counselor (TLB7)	SPA034	TLB7	Employee Relations	1	Closed	August 01, 2013 at 10:21 am	Actions
Employee Relations Counselor (TLB7B)	SPA032	TLB7B	Employee Relations	10	Closed	August 01, 2013 at 09:33 am	Actions
Administrative Support Assoc	SPA018	001111	Classification & Compensation	1	Closed	July 31, 2013 at 12:52 pm	Actions •
Employee Relations Counselor (TLB6)	SPA028	TLB6	Employee Relations	10	Closed	July 31, 2013 at 10:58 am	Actionsv
Administrative Support Assoc	SPA027	000051	Classification & Compensation	1	Closed	July 31, 2013 at 09:15 am	Actions •
Employee Relations Counselor (TLB5)	SPA022	TLB5	Employee Relations	1	Closed	July 30, 2013 at 03:42 pm	Actions
Employee Relations Counselor (TLB4)	SPA021	TLB4	Employee Relations	1	Closed	July 30, 2013 at 11:09 am	Actions •
Employee Relations Counselor (TLB3)	SPA017	TLB3	Employee Relations	0	Closed	July 29, 2013 at 03:08 pm	Actions
Administrative Support Assoc	SPA016	001111	Classification & Compensation	0	Closed	July 29, 2013 at 01:47 pm	
							Actions

Once you locate the posting you wish to create from, you can select it by moving your cursor over that posting's corresponding Actions drop down menu located in the far right column and clicking on **Create From**. This drop down menu will also give you the option of **View Posting** if you wish to view the information associated with a particular posting prior to selecting **Create From**:



By clicking **Create From**, the **New Posting** form will appear. This is where you can update the working title of the position for the purpose of posting, and view **Organizational Unit** information to confirm accuracy. You can also provide **Special Offline Application Instructions** in the field provided if necessary. Once all information is entered and confirmed on the **New Posting** page, click on the orange

Create New Posting button to begin updating posting information:

Home Postings Hirring Proposals   My Profile Help				
		Lir	nc Butler, you have 0 messages. Supervisor 💽 C logout	
Postings / SPA / New Posting				
New Posting		Create new posting button.	Create New Posting Cancel	
* Required Information				
Working Title *	Employee Relations Counselor (TLB	39)		
Organizational Unit Division/School/College *	VC for Human Resources	Confirm Organizationa	al Unit	
Department *	VC for Human Resources			
Section/Unit *	VC for Human Resources			
Online Applications				
Accept online applications?			-	
Special offline application instructions		Include special offline application instructions if necessary.	Create new posting button.	
			Create New Posting Cancel	

#### Create New SHRA Posting from an Existing Posting – Create from Posting

After clicking on the "**Create New Posting**" button, you will then be taken to the **Posting Details tab**, the first information tab that must be completed before the new **SHRA Posting** can be sent to the next step in the approval workflow. Each information tab is listed on the **Edit Posting** page in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while **EditStiviti** appear as blue links.

You can save the changes you've made to the active tab you're working on and navigate to the next tab in the list simultaneously by clicking the Next> button located in both the top and bottom right corners of the page. You can save the active tab you're working on and stay on the same tab by clicking the "Save" button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column; however, this action WILL NOT save any changes made to the tab you are navigating away from.

Required fields are highlighted in <u>red</u> and must be filled in before the new **SHRA Posting** can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check Circle** also appears next to tabs that do not contain any required fields.

NORTH CAROLINA	(Inbox) PeopleAdr	nin			
A&T STATE UNIVERSITY	Watch List APPLICANT	TRACKING 🔻			
Tab list	Home Postings Hiring Proposals   My Profile Help				
	Linc Butler, you have 0 messages. Supervisor	💌 C logo			
ostings SPA / Employee Relations Cou	nselor (TLB10) (Draft) / Edit: Posting Details				
-					
Editing Posting	Posting Details Save and Next buttons.	Next >>			
Posting Details					
Position Funding Infor					
Supplemental Questions	I o create a Posting, first complete the information on this screen, then click the Next button or select the page in the left hand navigation menu. Proceed through all sections completing all necessary information. To submit the Posting to Human Resources, you must go to the Posting				
Applicant Documents	Summary Page by clicking on the Next button until you reach the Posting Summary Page or select Posting Summary Page from the le navigation menu. Once a summary page appears, hover your mouse over the orange Action button for a list of possible approval step of the second	eft options.			
Search Committee	* Required Information				
Ranking Criteria	Classification Information				
Posting Documents	If the datails below are incorrect, please make the appropriate Classification selection using the "Classification' Tab on the left side				
Summary	menu while modifying the Position.				
	Position/Classification Title Human Resources Specialist				
	Job Code 11804				
Blue Check Circle	Classification Type SPA	104			

# Create New SHRA Posting from an Existing Posting – Posting Details Tab

Since you are creating a new **SHRA Posting** from an existing one, many of the fields will already be filled in with information copied from the existing posting. Follow the instructions at the top of the page to complete any remaining required fields, then click the Next button to save changes and navigate to the next tab:

Editing Posting	Posting Details		Save and Next buttons.	Save Next >>
Posting Details				,
Position Funding Infor	Position Funding Infor To create a Position, first complete the information on this screen, then click the Next button or select the page in the left		eft hand navigation menu. Proceed through all sections completing al	I necessary information. To submit the
<ul> <li>Supplemental Questions</li> </ul>	Posting to Human Resources summary page appears, how	s, you must go to the <b>Posting Summary Page</b> by clicking on the <b>Next</b> button until you revery our mouse over the orange Action button for a list of possible approval step options.	ach the Posting Summary Page or select Posting Summary Page from	n the left navigation menu. Once a
Applicant Documents     Applicant Committee	* Required Information			
Ranking Criteria	Classification Information			
<ul> <li>Posting Documents</li> </ul>	If the details below are inco	prrect, please make the appropriate Classification selection using the "Classification"	Tab on the left side menu while modifying the Position	
Summary	Position/Classification Title	Human Resources Specialist	Fields from the existing no	sting will be
	Job Code	11804	Fields from the existing pos	sting will be
Classification Type		SPA	copied in to your new post	ing.
	Salary Range	\$29,709 - \$58,106		
	Hiring Range			
	Contributing Reference	\$36.304	Enter a hiring range if desir	ed.
	Rate	000,004		••••
	Journey Market Rate	\$46,107		
	Advanced Reference Rate	\$52,101		
	Minimum	Bachelor's degree; or an equivalent combination of training and experience.		
	Experience/Education	All degrees must be received from appropriately accredited institutions.	Enter preferred years of ex	perience, skills,
		Test	tuning and advantion	, ,
	Preferred Years	•	training and education.	
	Experience, Skills, Training, Education			
		*		
	Competency Profile	http://www.osp.state.nc.us/Guide/CompWebSite/Profiles/HR%20Specialist%20Profile.pdf	Click to view Compete	ency Profile.
Primary Purpose of Position Primary Function of Organizational Unit Work Hours: From [time] to [time] on [days of week]		Test M-f 8-5pm	Continue to enter posting information into any emp fields as needed.	; ity
Key Res	sponsibilities and F	Related Competencies		
Requ	uired Competency	Applied Knowledge - HR Program and Organiz	ation	
Description		Performs X, Y, and Z.		
Required Competency		Customer Service		
Description		Performs A, B, and C.		
Required Competency		Communication - Verbal/Written		
	Description	Performs H.		

*	Working Title	Employee Relations Counselor (TLB10)	Continue to enter posting
	Competency Level	Journey	information into any empty
	Position Number	TLB10	fields as needed.
*	JCAT	12345	
	Approved Salary	\$45,000	
* 9	Salary Grade Equivalent		
*	FLSA	Exempt	
*	Appointment Type	Permanent - Full-time	
	FTE		
	If Time Limited, Appointment Length	If time limited, please indicate budget end date. If funded	from more than one fund, indicate earliest end date. This field can

You can indicate other users you would like to have **Supervisor** and / or **Applicant Reviewer** access to the posting by searching for their name in the Supervisor and Applicant Reviewer fields. Indicate the proposed **Open Date** and **Close Date**, which will define the number of days applicants can view and apply for the posting. The minimum allowable posting period for SHRA positions is five (5) calendar days. Select the appropriate **Fast Find** category for the posting to ensure it is included in the correct pre-defined search when an applicant clicks on the corresponding Fast Find button through the applicant portal. Choices are Administrators and Research, Faculty, Post Doctoral, Temporary Staff, and Staff. For SHRA positions, the appropriate **Fast Find** selection is "Staff":

Posting Detail Information	n			Supervisor and / or
* Supervisor	Select Some Options	This fie	eld is required.	Applicant Reviewer
* Applicant Reviewer	Select Some Options	This fie	eld is required.	posting.
Posting Number				
* Open Date	This field is required.	Minim	num allowable p	posting
* Close Date	This field is required.	period	d is five (5) caler	ndar days.
Special Instructions to Applicant			*	
* Fast Find Information	Please select  This field is require	red.	Select the mos Find category	st appropriate Fast for the posting.

Include details regarding any special advertising requests, such as posting the position on additional job posting websites or in specific print media outlets, in the **Advertising Summary** field. A link to the job posting on the North Carolina A&T State University applicant portal will be included in any special advertising. The **Pass Message** and **Fail Message** fields contain template notifications that will be sent to applicants who are screened out of the posting through **Supplemental Questions**. Once all fields on the Posting Details Tab are complete, click the Next button to save your changes and move to the next tab. You can also click the "Save" button if you wish to save your changes and keep working on the current tab.

Advertising Summary	Include any special advertising request information.			
	Please list additional external advertising sources if different than standard advertising sources. Standard sources include: NC Employment Security Commission & UNC General Administration			
* Pass Message	Thank you for your interest in this position. The screening and selection process is currently underway and will continue until a successful candidate is chosen. Should review of your qualifications result in a decision to pursue your candidacy, you will be contacted.			
* Fail Message	Thank you for your interest in this position. Based on your responses to the questions on the employment application, you do not meet the minimum qualifications for this position. Please do not let this discourage you from applying for other positions that interest you.			
	Save and Next buttons.			

# <u>Create New SHRA Posting from an Existing Posting – Position Funding</u> <u>Information Tab</u>

In the Budget Advisory Approval section of this tab, state what mission specific, essential, and / or key objectives will not be met if the position is not filled. All recruitment of permanent EHRA and SHRA positions that are funded in whole or in part by **general state funds** requires approval by the University's Budget Advisory Committee:

stings / SPA / <u>Employee Relations Coun</u>	Linc Butter	r, you nave u messages. Supervisor 💽		
Editing Posting	Position Funding Information	Save <> Prev Next		
Posting Details	45 Check spalling 🖂			
Position Funding Infor				
Supplemental Questions	* Required Information			
Applicant Documents	Budget Advisory Approval			
Search Committee	All recruitment of permanent EPA and SPA positions that are funded in whole or in part by gene A&T's Budget Advisory Committee. To receive consideration of the Committee's review process			
Ranking Criteria	essential, and / or key objectives will not be met if the position is not filled.	State what mission		
Posting Documents		specific, essential,		
Summary	Mission Specific, Essential and/or Key Objectives not Met without position	and/or key objective will not be met if position is not filled.		

Funding Source information from prior posting will copy over into the fields in the Funding Source Details section of this tab, and you can make edits as necessary. **PLEASE NOTE:** The annual amount budgeted must support the hiring range indicated on the Posting Details Tab.

If you are unsure of what fund to use, the most up to date information may be found in **Banner Finance** on these forms:

1) FTVORGN- Provides a list of Org Codes

2) **FTVFUND**- Provides a list of Funds

3) FTVACCT- Provides a list of Accounts

These forms show listings of all active funds. For additional help, refer to the Banner Training Guide.

If the position has more than one funding source, click on the **Add Funding Source Details Entry** button and **"Save"** until all sources have been entered. **PLEASE NOTE:** Each time you add an additional entry, you will need to **scroll down below the last saved entry** to enter a new funding source. Once all funding sources have been added, click Next>>> to move to the next tab:

Funding Source Details						
Indicate the funding source(s) for this position. Click on "Add Funding Source Details Entry" to enter budget and other required codes. Select "SAVE" after each entry. Please note that the annual amount budgeted must equal the requested salary.						
If the position has more than one funding source, continue to select "Add Funding Source Details Entry" and "Save" until all sources are entered. Each time you add an additional entry, you will need to scroll down below the last saved entry to enter a new funding source.						
State Appropriated * Funding / Non-State Appropriated Funding	State Appropriated Funding	Funding information				
If non-state, select source of funding	Please select	will be copied in from				
If other, designate source		the prior posting,				
* Budget Code	16070 (State)	which you can edit as				
* Fund	111111 Format: 6 digit number #######	necessary.				
* Org	11111 Format: 5 digit number ######					
* Account	11111 Format: 5 digit number ######		<b>IMPORANT NOTE:</b>			
* Program	111 Format: 3 digit number ####		Remember to click			
Date Funds End			funding course is			
* Annual Amount	\$45,000	Click here to add a funding source. If	antered			
* Percentage of FTE	1.0	the position has more than one funding	entered.			
Add Funding Source Details Entry Add Funding Source are entered. Save <pre>rev</pre>						

# <u>Create New SHRA Posting from an Existing Posting – Supplemental</u> <u>Questions Tab</u>

In the **Supplemental Questions** tab, you can identify screening questions related to an applicant's education and experience that must be answered as part of the application process. To add supplemental questions to your posting, click on the button labeled **"Add a Question"**. A pop up section will appear where you can add an existing question or submit a new one. Once done, click on the Next>>> button to save changes and proceed to the next tab:
Editing Posting	Supplemental Questions San	/e <> Prev Next >>
Posting Details	Adding New Posting Questions: Click on the button labeled "Add a Question". A pop up section will appear where you ca	an add an existing
Position Funding Infor	question or submit a new one.	
Supplemental Questions	Adding Existing Posting Questions: There are two ways to search for approved posting questions to add to the job being using the key word search or filter by question category.	posted. You can filter
Applicant Documents	Submitting New Posting Questions: To submit a new question for review and approval, click on the button labeled "Add a	Question" When the
Search Committee	Available Supplemental Questions box opens, click on the "Add a New One" link in the bottom right hand corner.	Question : when the
Ranking Criteria	Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear	where points and
Posting Documents	disqualifying responses can be associated to the posting question.	
Summary	Posting Question Options: Once questions have been added to the posting, you will see a column of checkboxes to the checking these boxes will make a question required.	eft of each question;
	Included Supplemental Questions	Add a question
	Click to add supplemental	Statua
	questions.	Status
	Sa	/e << Prev Next >>

Adding Existing Posting Questions: There are two ways to search for approved posting questions to add to the job being posted. You can filter using the key word search or filter by question category. To add an existing question, click the check box next to the question you wish to add.

**Submitting New Posting Questions:** To submit a new question for review and approval, click on the button labeled "Add a Question". When the **Available Supplemental Questions** box opens, click on the **"Add a New One"** link in the bottom right hand corner.

Cateç	gory: Any	<ul> <li>Keyword</li> </ul>	l:			Filter supplemental question
Add	Category	Question				by keyword or category.
	Uncategorized	How did you hear	about this emplo	yment opp	ortunity?	
	Experience	Do you have at lea experience?	ast one year of re	esponsible	payroll or financial and s	statistical record keeping
	Education	Do you have a hig	jh school diploma	a or equival	ent?	
	Experience	Do you have HR e	experience?			
	Education	Do you have a Hig	gh School diplom	ia?		V
	Education	Do you have a Ma	aster's Degree?			
	Education	Do you have a Ma	aster's Degree?			
	Experience	How many years of	of Accounting ex	perience do	you have in a higher ed	ducation setting?
	Education	Do you have a Hig	gh School diplom	ia?	Click to submit a	custom supplemental
	Experience	Do you have at lea	ast 4 years of ex	perience?	question for revie	ew and approval.
Dipl Click ch existing	aying all 10 neck box to ac g supplement	ld an al question.		Click Su	Can't find the one	you want? Add a new one

**Assign Points or Disqualifying Responses:** Click on the question that has been added and a dropdown menu will appear where points and disqualifying responses can be associated to the posting question.

**Posting Question Options:** Once questions have been added to the posting, you will see a column of checkboxes to the left of each question; checking these boxes will make a question required.

Included \$	Supplementa	al Questions				Add a q	uestion
Position	Required	Category	Question			Status	
1		Uncategorized	How did you hear about th	is employment opportunity?		active	×
2		Experience	Do you have at least one y keeping experience?	ear of responsible payroll or financial and sta	tistical record	active	8
3		Education	Do you have a High Scho	L P L		active	×
4		Experience	How many years of Accou	Assign points to answers.	cation setting?	active	8
T_	T		Possible Answers: Predef	ined Options			
Ľ	Click to ma required.	ake questions	Answer 1. 0 years 2. 1-3 years 3. 4-5 years 4. 5+ years				
Reorde	r question	s.		Click to assign disqualifying a	nswers.		lext >>

# <u>Create New SHRA Posting from an Existing Posting – Applicant</u> <u>Documents Tab</u>

In the **Applicant Documents** tab, Applicant documents can be included in the application process by selecting **Included** to make the documents optional and **Required and Included** to make the document(s) mandatory to complete the application process. Documents attached by the applicant during the application process will be accessible for viewing during applicant review. Once done, click on the Next>> button to save changes and proceed to the next tab:

<b>g Posting</b> ting Details	Click I uploa	ncluded to make ding a document	optional.	Click <u>both</u> Included <u>and</u> Requir make uploading a document re	ed to equired.
osition Funding Infor	Included	d to make the document(s) ma	indatory to complete t	e aprication process.	
upplemental Questions	Order	Name	Included?	Required?	
Applicant Documents	1	Resume			
Search Committee					
Ranking Criteria	2	Cover Letter			
Posting Documents			_	_	
Summary	3	Curriculum Vitae			
	4	Teaching Philosophy			
	5	Letter Of Reference 1			
	6	Letter Of Reference 2			
	7	Letter Of Reference 3			

### <u>Create New SHRA Posting from an Existing Posting – Search Committee</u> <u>Tab</u>

Search Committees are advisory in nature and serve the purpose of recruiting a qualified applicant pool, reviewing their credentials, and recommending acceptable candidates to the hiring manager. Search Committees can consist of University employees both internal and external to the hiring unit, as well as individuals external to the University who represent key stakeholders.

In the **Search Committee** tab, you can assign search committee members who will have access to review application information for a specific posting. Search committee members can view applications, applicant documents, and evaluate / rank applicants based upon ranking criteria you establish as part of the posting. Requests to add search committee members will be reviewed and approved by the Division of human Resources (DHR) once the posting request is routed to DHR for approval. Upon DHR approving a search<sup>10</sup>

committee member's access, the search committee member will receive an e-mail notification with instructions on how to access the online posting and related application information:

Editing Posting	Search Committee	Save <pre><pre>Save</pre></pre>		
Posting Details	Search Committees are advisory in pature	and same the purpose of recruiting a qualified applicant pool, reviewing their credentials, and		
Position Funding Infor	recommending acceptable candidates to the him barve are purpose of recomming a qualified applicant poor, tevering intell dedentials, and recommending acceptable candidates to the him granger. Search Committees can consist of University employees both internal and exter to the him write a transmission of the search committees can consist of the search committees can consist of University employees both internal and exter to the him write a transmission of the search committees can consist of University employees both internal and external to the University with expressent level as internal to the University with expressent level as internal to the University and the search committees can consist of University and the search committees ca			
Supplemental Questions	to the hiring unit, as well as individuals ex	ternal to the University who represent key stakeholders.		
Applicant Documents	Search Committee Members			
Search Committee	No Search Committee Members have bee	en assigned to this Posting yet.		
Ranking Criteria	Coorah			
Posting Documents	Search			
Summary	Find a User to assign as a Search Comm	ttee Member.		
	First Name			
	Last Name	To search for a pre-approved search		
	Email Address	committee member enter the name and		

After searching for a pre-approved search committee member, click on the **Add Member** button to add them to your search committee. You can also make a search committee member the chair of the search committee by clicking on the check box next to **"Make Member the Committee Chair"**:

Search Committee Memb	pers
No Search Committee Members	s have been a click the check box to assign the
Search	search committee member as the committee chair.
Find a User to assign as a Searc	ch Committee Memer.
Name Email Address	Add Member
Lonnie Crotts emailaddress@zed.ze	ed Add Member 🔲 Make Member The Committee Chair
First Name Lonnie	
Last Name Crotts	Click the Add Member button to add
Email Address	searched for.
Search	

To create an account for a new search committee member, enter in the committee member's name, current e-mail address, and desired username, then click on the **Submit** button:

New Search Committee Member		
Request that someone be granted access to the	e system for the purpose of serving as a Search Committee Member.	
Required fields are indicated with an asterisk (*	).	
Account Information		
Please enter the following information to creat	ate an account for a new Search Committee Member	1
* First Name * Last Name	To create an account for a new	
* Email	search committee member, complete	
* Username	the fields and click submit.	111
Submit		

If the requested search committee member is already an assigned user of the PeopleAdmin system, their user account information will be displayed, and you can add them to your search committee by clicking on the **Add User** button:

Ma Username	atching User ambraun	
First Name Last Name Email Preferred Grou Add User Clear Matching New Search Request that som	Amy Braun emailaddress@zed.zed up Employee Users Committee Member neone be granted access to the system	Click the Add User button to add the new search committee member in a pending status. Access will be reviewed and approved by DHR.
Required fields a	re indicated with an asterisk (*).	
Account mom		
* First Nan	ne Amy	
* Email	ambraun@ncat.edu	
* Usernam	ne ambraun	
Submit		
		Save << Prev

### Create New SHRA Posting from an Existing Posting – Ranking Criteria Tab

**Ranking Criteria** can be used by search committees during the applicant review process to rank applicants based upon job-related experience and education factors. This optional tool can be helpful in identifying the most qualified candidates in an applicant pool. Ranking criteria are not presented to the applicant:

		interna				
Editing Posting	Ranking Criteria				Save <> Prev	Next
Posting Details	Ranking Criteria can be use	d used by search committees du	ring the applican	t review process to rank applicants	based upon job-relat	ed
Position Funding Infor	<ul> <li>experience and education fa criteria are not presented to</li> </ul>	actors. This optional tool can be h the applicant.	elpful in identifyi	ing the most qualified candidates ir	an applicant pool. Ra	inking
Supplemental Questions	Adding New Ranking Criteri	a: Click on the button labeled "Ad	Id a Criterion". A	dialog box will appear where you	can add an existing cr	terion by
Applicant Documents	checking the box in the "Ade	d" column or submit a new one fo	r approval		d "Add a Critari	an " Mala a
Search Committee	the Available Evaluative Cri	teria box opens, click on the "Ade	Click to	add ranking criteria	ed Add a Criterio	on". vvne
Ranking Criteria	Included Evaluative Criter	ia			Ad	d a Criteri
Posting Documents	Category Des	scription		Weight Workflow State	Status	
Cummon (						

To add ranking criteria, click on the button labeled **"Add a Criterion"**. A dialog box will appear where you can add an existing criterion by checking the box in the "Add" column or submit a new one for approval. To submit a new ranking criterion for review and approval, click on the button labeled **"Add a Criterion,"** then click on the **"Add a new one"** link in the bottom right hand corner of the dialog box that opens.

Add a Ranking Crite	uative Criteria				×
Category: Any	Keyword:     Description	•		Search for ranki keyword or cate	ing criteria by
Uncategorized	d Rank Experience - 5 is the h Possible Answers: 1. 1 2. 2 3. 3 4. 4 5. 5 Applicant workflow state	ighest Indicate the applican that allows an applica Under Review by HR	t work ant to	oflow state be ranked. ▼	ari IS Oli to
Uncategorized	d Please rate the candidates e d Teaching experience in a un	experience related to the job:	Click crite	to submit a cust rion for review a	om ranking nd approval.
Deplaying all 3 lick check box to xisting ranking ci	add an riterion.	Can't find Click Submit when finished.	d the on	submit	ancel

Editing Posting	Ranking Crite	ria	Click Save or N	lext to	move	Save	<< Pre	av Nex
Posting Details	Ranking Criteria ca	in be used used by search com	to the next tab	).	plic	ants based up	on job-rela	ated
Position Funding Infor	criteria are not pres	ucation factors. This optional to sented to the applicant.	rear be neipiar in laonairyin	ig the most	quannea canaldai	es in an applica	ant pool. H	Ranking
Supplemental Questions	Adding New Rankir	ng Criteria: Click on the button I	abeled "Add a Criterion". A	dialog box v	vill appear where	you can add an	existing o	criterion
Applicant Documents	checking the box in	the "Add" column or submit a r	ew one for approval.					
	Submitting New Ra	anking Criteria: To submit a new	ranking criterion for review	and approv	/al, click on the bu	itton labeled "A	dd a Critei	rion". Wr
Search Committee	the Available Evalu	ative Criteria box opens, click o	n the "Ădd a new one" link i	in the botto	m right hand corne	er.		
<ul> <li>Search Committee</li> <li>Ranking Criteria</li> </ul>	the Available Evalu	ative Criteria box opens, click o ve Criteria	n the "Ădd a new one" link i	in the botto	n right hand corne	er.	A	Add a Crite
<ul> <li>Search Committee</li> <li>Ranking Criteria</li> <li>Posting Documents</li> </ul>	the Available Evalu Included Evaluation Category	ative Criteria box opens, click o ve Criteria Description	n the "Ădd a new one" link i	in the botto Weight	m right hand corne Workflow State	er. Status	A	Add a Crite
<ul> <li>Search Committee</li> <li>Ranking Criteria</li> <li>Posting Documents</li> <li>Summary</li> </ul>	the Available Evalu Included Evaluation Category Uncategorized	ative Criteria box opens, click o ve Criteria Description Teaching experience in a univ	n the "Ădd a new one" link i ersity	in the botton Weight	n right hand corne Workflow State Under Review by Dept/Committee	er. Status active	A (3)	Add a Crite
<ul> <li>Search Committee</li> <li>Ranking Criteria</li> <li>Posting Documents</li> <li>Summary</li> </ul>	the Available Evalu Included Evaluation Category Uncategorized Uncategorized	ative Criteria box opens, click o ve Criteria Description Teaching experience in a univ Please rate the candidates ex	n the "Ădd a new one" link i ersity perience related to the job:	Weight	Workflow State Under Review by Dept/Committee Under Review by Dept/Committee	er. Status active active	8	Add a Crite

# <u>Create New SHRA Posting from an Existing Posting – Posting</u> <u>Documents Tab</u>

The **Posting Documents Tab** allows you to upload documents as attachments that will route with the posting request through the approval workflow. Attachments can be uploaded as follows:

- **Upload New:** Choose this option if you want to upload a file from your computer.
- **Create New:** Choose this option if you want to create a new file to attach using the PeopleAdmin editor.
- **Choose Existing:** Choose this option if you want to attach a file that has already been uploaded into PeopleAdmin as part of another action.

Excel and Word documents may be attached. PDF conversion must be completed for the document to be valid when applicable:

	iseror (TEBTO) (Drait) / Euri: Posung Documents	
Editing Posting	Posting Documents	Save << Prev Next >
Posting Details	To add a document to the posting, hover over the blu	ue Action text link to the right of the document name.
Position Funding Infor	Documents can be uploaded by browsing for the doc	cument or a document can be written or previously selected. Document types that are
Supplemental Questions	supported as attachment include .doc, .docx, .pdf, .rt converted to .pdf for security.	f, the tot tiff tif inca inc inc and view All documents unleaded will be
Applicant Documents	PDF conversion must be completed for the documen	Click "Actions", then select Upload New,
Search Committee	Document Type Name Status (Actions)	Create New, or Choose Existing in order
Ranking Criteria	Marketing Plan Actions	to upload an attachment.
Posting Documents	Print Ad Text Upload New	
	Create New	

#### Create New SHRA Posting from an Existing Posting – Summary Tab

The **Summary Tab** allows you to perform a final review all of the posting information you've entered on the previous tabs prior to sending the request to the next step in the approval workflow. Please review the details of the posting summary carefully before continuing.

The Blue Circle Check appears by those tabs for which all required information has been entered:

Postings / SPA / Employee Relations Counselor (TLB10) (Draft) / Summary						
	Posting: Employee Relation (SPA) Edit       Current Status: Draft       Position Type: SPA       Sector/Unit VC for Human       Resources	ns Counselor (TLB10) Created by: Linc Butter Owner: Linc Butter		Take Action On Posting • <ul> <li>See how Posting looks to Applicant</li> <li>Print Preview (Applicant View)</li> <li>Print Preview</li> </ul>		
	Please review the details of the pos	ting carefully before continuing.				
	To take the action, select the approp appears. When you are ready to sul	priate Workflow Action by hovering over the orange "Take Action on this bmit your posting, click on the Submit button on the popup box.	Posting" button. You may add a Comment to the posting and also add this post	ing to your Watch List. in the popup box that		
	To edit the posting, click on the Edit this section and make necessary co	it link next to the Section Name in the Summary Section. This will take yo prections before moving to the next step in the workflow.	u directly to the Posting Page to Edit. If a section has an orange icon with an	exclamation point, you will need to review		
	Posting Details Edit	Click "Edit" to make edit	s to a tab.			
	If the details below are incorrect	t, please make the appropriate Classification selection using the "Classifica	ation' Tab on the left side menu while modifying the Position.			
В	ue Circle Check	Human Resources Specialist				
		11804				
	Classification Type	SPA				
	Salary Range	\$29,709 - \$58,108				

An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save"**, and then return to the **Summary Tab** by clicking on the link in the left column:

Position Funding Information Edit		Click "Edit" to make edits to a tab.	
Budget Advisory Approval Orange Circle Exclamation Point	EPA and SPA positi deration of the Com	ons that are funded in whole or in part by general state fur mittee's review process, state below what mission specific	ds requires approval by A&T's Budget Advisory essential, and / or key objectives will not be met if the
Mission Specific, Essentia and/or Key Objectives not N without position	Al Test		

Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example, the appropriate routing action is **"Send to Department Head (Move to Department Head)"**:

North Carolina		Inbox	<b>People</b> Admin
	Home Postings Hiring Proposals   My Profile	Watch List Help Linc Butler, you have 0 messages. Supervisor	APPLICANT TRACKING
Postings / SPA / Employee Relations Counselor (TLB10) (Draft       Posting: Employee Relations Courselor (SPA)       Edit       Current Status: Draft       Position Type: SPA       Section/Unit: VC for Human       Resources       Summary       History       Settings	Click on "Take Action On Pending Request", then select "Send to Department Head" to move the request to the next step in the approval workflow.	Take Action On Posting • WORKFLOW ACTONS Keep working on this Posting Canceled (move to Canceled Send to Department Head (m Department Head)	i) hove to
Please review the details of the posting can To take the action, select the appropriate V and also add this posting to your Watch Li box.	retully before continuing. Vorkflow Action by hovering over the orange "Take Action on thi st. in the popup box that appears. When you are ready to submit	s Posting" button. You may add a Comment t your posting, click on the <b>Submit</b> button on th	o the posting ne popup

You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send the action to the next level in the approval workflow, click the **"Submit"** button:



If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation:

"Fund" is required and All required fields must be set before transitioning.		8
North Carolina A&T State University	Watch List APPLICANT TRACKING	
Red bar indicating the required fields that	Linc Butler, you have 0 messages. Supervisor	logout
need to be completed before submitting the request to the next step in the workflow.		
	Take Action On Posting •	

Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

6	Posting was successfully transitioned	8	ŕ
	Aat State University	Watch List APPLICANT TRACKING	
	Home Postings Hiring Proposa	sals   My Profile Help	
	Green confirmation bar indicating the Pending	Linc Butler, you have 0 messages. Supervisor 💌 C logout	:
	Derwest was sussessfully transitioned and		
	Request was successfully transitioned and		
	added to your Watch List.		
	(SPA) Current Status: Department Head	🚖 See how Posting looks to Applicant	

The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

### <u>Create New SHRA Posting from an Existing Posting - Saving to Return to a</u> <u>Pending Request Later</u>

On the **Summary Tab** is an important menu item which should be selected if you need to stop a work session on the posting before submitting it to the next level for approval. Following this step will ensure that all your work is saved when you open the request for completion.

- 1) Click the "Save" button located in either the top or bottom right corner
- 2) Select "Summary" from the Tab List (illustrated above)
- 3) Select "Keep Working on this Posting"

		Home	Postings	Hiring Proposals	My Profile	Help		
						Linc Butler, you have 0 messages	Supervisor	▼ C logout
Postings	s / EPA / Employee Relations Counselo	or (TLB10) (Draft) / Summary						
	Posting: Employee Rel (EPA) Edit Current Status: Draft Position Type: EPA Section/Unit: VC for Human	ations Counselor (T Created by: Linc Butler Owner: Linc Butler	LB10)			Take Action On WORKFLOW ACT Keep working Canceled (mo Send to Depa Department H	Posting v Tons on this Posting ve to Canceled) rtment Head (move to ead)	
	Summary History Settin	gs Hiring Proposals	Associated Po	osition Description				

4) Add any Comments into the window that opens (below) as notes to yourself, if desired.

#### 5) Click "Submit"



The **Posting** can be located when you log into the Applicant Tracking module again as the same **User Type** you used to begin the action. Hover your cursor over the **Postings tab** and click on "**SHRA**" You will then return to the **SHRA Postings view**, which provides a list of all postings based on your active user type, from which you can search for and select this posting and continue.

#### **Create New SHRA Posting - Create from Position Description**

Select **Create from Position Description** if you wish to create a posting using information from a position description that has previously been approved in the PeopleAdmin system.

**<u>PLEASE NOTE</u>**: If the position classification and/or the position description details have changed, you must start a Modify Position action in the Position Management module prior to posting the position.

Choosing the **Create from Position Description** option copies information from an existing position description into a new posting:



After clicking on **Create from Position Description**, you will be taken to the **SHRA Position Descriptions** view, where you can search position descriptions by any number of criteria, including but not limited to position title, posting number, position number, department name, or supervisor name. Searches are fully customizable by position attributes, and you can save custom searches for use again later. If you need assistance in finding the desired position description, please contact the <u>Classification and</u> <u>Compensation Analyst</u> in the Division of Human Resources:

NORTH CAROLINA AST STATE UNIVERSITY			Home Postings	Hiring Proposals   My Profile Hel	ρ		(Inbox) Peo Watch List APP	pleAdmin LICANT TRACKING
Postings / SPA / Create from Position D SPA Position Descripti	escription				Active user Supervisor.	type is	Supervisor	C logout
Open Saved Search + 5 Add Colum Departme First Narr List of curr	eerch: [tb10 wr: [Add Column VC for Human Resources ent / pendin	Beneration of the second secon	) Hide search options	Searches a position at saved for la	re customizabl tributes and ca ater use.	e by an be	Action down	s drop menu.
SHRA post	ings by activ r type. sition Descriptions" (31 Items	Found)	-	- Previous 1 2 Next→				
working Position Title	Position Number	Employee First Name	Employee Last Name	Position/Classification Title	Department	supervisor	Status	(Actions)
Administrative Support Spec	000018	Beinga	Mackin	Administrative Support Spec	HK Systems	Asst VC-Human Resources (Linc Butler)	Active	Actions
Human Resources Specialist	000025	Later	Cole	Human Resources Specialist	Benefite	Aget VC Human Resources (Linc Buller)	Active	Actions
Human Resources Specialist	LC0040	Lonnie	Crotts	Human Resources Consultant	Recruitment and Retention	Asst VC-Human Resources (Linc Buller)	Active	Actions
Human Resources Consultant	000051	Amy	Braun	Human Resources Consultant	Classification & Compensation	Asst VC-Human Resources (Linc Butler)	Active	Actions
Human Resources Consultant	000057	Courtney	Carey	Human Resources Consultant	Temporary Employment	Human Resources Consultant (Tammie Hill)	Active	Actions
Human Resources Specialist	000066	Linda	Smith	Human Resources Specialist	Student & Foreign National Employment	Human Resources Specialist (Penelope Smith)	Active	Actions

Once you locate the position description you wish to create from, you can select it by moving your cursor over that position description's corresponding Actions drop down menu located in the far right column and clicking on **Create From**. This drop down menu will also give you the option of **View** if you wish to view the information associated with a particular position description prior to selecting **Create From**:



By clicking **Create From**, the **New Posting** form will appear. This is where you can update the working title of the position for the purpose of posting, and view **Organizational Unit** information to confirm accuracy. You can also provide **Special Offline Application Instructions** in the field provided if necessary. Once all information is entered and confirmed on the **New Posting** page, click on the orange

Create New Posting button to begin updating posting information:

	Home Postings Hiring Proposals   I	My Profile Help	
			Linc Butler, you have 0 messages. Supervisor 💽 C logout
Postings / SPA / New Posting			
New Posting		Create new posting button.	Create New Posting Cancel
* Required Information			-
Working Title *	Employee Relations Counselor (TLB9)		
Organizational Unit Division/School/College *	VC for Human Resources	Con	firm Organizational Unit
Department *	VC for Human Resources	info	rmation.
Section/Unit *	VC for Human Resources		
Online Applications			
Accept online applications?	,		
Special offline application instructions		Include special offline application instructions if necessary.	Create new posting button.

After clicking on the "**Create New Posting**" button, you will then be taken to the **Posting Details tab**, the first information tab that must be completed before the new **SHRA Posting** can be sent to the next step in the approval workflow. Each information tab is listed on the **Edit Posting** page in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while **EditStively** appear as blue links.

You can save the changes you've made to the active tab you're working on and navigate to the next tab in the list simultaneously by clicking the Next>>> button located in both the top and bottom right corners of the page. You can save the active tab you're working on and stay on the same tab by clicking the "Save" button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column; however, this action WILL NOT save any changes made to the tab you are navigating away from.

Required fields are highlighted in <u>red</u> and must be filled in before the new **SHRA Posting** can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check Circle** also appears next to tabs that do not contain any required fields:

North Carolina	(Inbox) PeopleAdmin
A&T STATE UNIVERSITY	Watch List APPLICANT TRACKING
Tab list	Home Postings Hiring Proposals   My Profile Help
	Linc Butler, you have 0 messages. Supervisor
ostings SPA / Employee Relations Cou	inselor (TLB10) (Draft) / Edit: Posting Details
Editing Posting	Posting Details Save and Next buttons
Posting Details	
Position Funding Infor	
Supplemental Questions	To create a Posting, first complete the information on this screen, then click the Next button or select the page in the left hand navigation menu. Proceed through all sections completing all necessary information. To submit the Posting to Human Resources, you must go to the Posting
Applicant Documents	Summary Page by clicking on the Next button until you reach the Posting Summary Page or select Posting Summary Page from the left navigation menu. Once a summary page appears, hover your mouse over the orange Action button for a list of possible approval step options.
Search Committee	*Required Information
Ranking Criteria	Classification Information
Posting Documents	If the details below are incorrect, please make the appropriate Classification selection using the "Classification' Tab on the left side
Summary	menu while modifying the Position.
	Position/Classification Title Human Resources Specialist
	Job Code 11804
Blue Check Circle	Classification Type SPA

# <u>Create New SHRA Posting from a Position Description – Posting Details</u> <u>Tab</u>

Since you are creating a new **SHRA Posting** from an approved position description, many of the fields will already be filled in with information copied from the position description. Follow the instructions at the top of the page to complete any remaining required fields, then **CNEX** button to save changes and navigate to the next tab:

Position Cuerce with the set of the set o	Editing Posting Posting Details		Save and Next butto		Save and Next buttons	Save	ext >>
 Beneric and the second seco	Posting Details	<sup>®</sup> Check spelling ▼					
<pre>intervalue intervalue interv</pre>	Position Funding Infor	To create a Posting, first con	nplete the information on this screen, then click the Nex	t button or select the page in the lef	ft hand navigation menu. Proceed through all sections completing all	I necessary information. To submit t	he
Primary Function of Position       Test         Description       Primary Position         Description       Primary Applied Knowledge - HR Program and Organization         Description       Performs A, B, and C.         Description       Performs A, B, and C.         Description       Performs H, Berton Verbal/Written	Supplemental Questions     Applicant Documents	Posting to Human Resources summary page appears, how	s, you must go to the <b>Posting Summary Page</b> by clicki er your mouse over the orange Action button for a list o	ing on the <b>Next</b> button until you read of possible approval step options.	ch the Posting Summary Page or select Posting Summary Page from	n the left navigation menu. Once a	
Persition       Persition       Test         Primary Purpose of Position       Test       Persition         Position       Test       Persition         Position       Test       Persition         Primary Purpose of Position       Test       Persition         Position       Test       Persition         Position       Test       Persition         Primary Europose of Position       Persition       Persition         Primary Europose of Position       Test       Persition         Description       Persons Av and Z       Pers	Applicant Documents     Search Committee	* Required Information					
With the stand we have the stand we	<ul> <li>Ranking Criteria</li> </ul>	Classification Information					
Image: Section of Organizational Unit       Test         Primary Purpose of Organizational Unit       Test         Primary Purpose of Organizational Unit       Test         Organizational Unit       Test         Organizational Unit       Test         Organizational Unit       Test         Description       Performs X, Y, and Z.         Required Competency       Customer Service         Description       Performs A, B, and C.         Required Competency       Customer Service         Description       Performs H.	Posting Documents	If the details below are inco	prrect, please make the appropriate Classification se	election using the "Classification"	Tab on the left side menu while modifying the Position		
Area in the supported position the supported position description         will be copied in to your new posting.         Will be copied in to your new posting.         Will be copied in to your new posting.         Enter a hiring range if desired.         Warking to the support of postion of the support of the suport of the support of the support of the support of the	Summary	Position/Classification Title	Human Resources Specialist	<b>Ei</b> a	alds from the annroved posi	tion descriptio	n
will be copied in to your new posting.         the postion of your new posting.         will be copied in to your new posting.         Primary Purpose of Position       Test         Primary Purpose of Your new posting.       Test         Work Hours: From Your new posting.       Mr8-5pm         of week?       Aplied Knowledge - HR Program and Organization		Job Code	11804				"
Water State       Enter a hiring range if desired.         Answer Wenden Hill       197         Position       Test         Primary Function of Organizational Unit       Test         Brimel Jo Liften Jo Information Into any empty fields as needed.       197         Work Hours: From of week]       Mr8-5pm         Description       Performs X, Y, and Z.         Required Competency       Commu		Classification Type	SPA	will be copied in to your new postin			
Image: Section Concernies       Enter a hiring range if desired.         Image: Section Concernies       Enter a hiring range if desired.         Image: Section Concernies       Enter preferred years of experience, skills, raining and education.         Click to view Competency Profile.       Click to view Competency Profile.         Position Overview       Enter posting information into any empty fields as needed.         Work Hours: From grange of week?       Mr18-5pm         Vork Hours: From grange of week?       Mr18-5pm         Key Responsibilities and Related Competencies       Mr18-5pm         Description       Performs X, Y, and Z.         Required Competency       Customer Service         Description       Performs A, B, and C.         Required Competency       Communication - Verbal/Written         Description       Performs A, B, and C.         Required Competency       Communication - Verbal/Written         Description       Performs H.		Salary Range	\$29,709 - \$58,106	L			
Current of the state   State  <		Hiring Range					
Image: State Stat		Contributing Reference	\$36,304		Enter a hiring range if desir	ed.	
Image: Section of Sect		Journey Market Rate	\$46.107	L			
Image:		Advanced Reference	553.404				
Image: Section Coverview       Image: Section Coverview       Inter preferred years of experience, skills, ining and education.         Position Coverview       Itick to view Competency Profile.         Position Coverview       Itick to view Competence Profile.         Primary Purpose of Position of Organizational To itic Test       Position Overview and Key Responsibilities and Related Competencies: Continue to enter posting information into any empty fields as needed.         Work Hours: From Itime] to [time] on [days       M+B-5pm         Verkesponsibilities and Related Competencies       M+B-5pm         Description       Performs X, Y, and Z.         Required Competency       Customer Service         Description       Performs A, B, and C.         Required Competency       Communication - Verbal/Written         Description       Performs A, B, and C.         Required Competency       Communication - Verbal/Written         Description       Performs A, B, and C.         Required Competency       Communication - Verbal/Written         Description       Performs H.		Rate	\$52,101				
Image: New York Willing and education.         Image: New York Willing and education.         Concernent Willing and education.         Primary Purpose of Position Overview and Key Responsibilities.         Primary Purpose of Test         Primary Purpose of Organizational Unit         Test         Primary Purpose of Organization Into         Work Hours: From Itime Ion Idays         M-18-5pm         More Responsibilities and Related Competencies         Required Competency       Applied Knowledge - HR Program and Organization         Description       Performs X, Y, and Z         Required Competency       Customer Service         Description       Performs A, B, and C.         Required Competency       Communication - VerbalWritten         Description       Performs H.		Minimum Experience/Education	Bachelor's degree; or an equivalent combination of training and exp All degrees must be received from appropriately accredited institution	perience. ons.	Enter preferred years of ex	perience, skills	; <b>,</b>
Prime weight   weight   weight   Period   Primary Purpose of Position Overview   Primary Purpose of Position   Primary Function of Organizational Unit   Test   Primary Function of Organizational Unit   Test   Work Hours: From Time to Itime to Itime to Itime to Position   Work Hours: From Time to Itime to Itime to Applied Knowledge - HR Program and Organization   Key Responsibilities and Related Competencies   Description   Performs X, Y, and Z.   Required Competency   Customer Service   Description   Performs A, B, and C.   Required Competency   Communication - Verbal/Written   Description   Performs A, B, and C.   Description   Performs H.			Test	^ <b>(</b>	training and education.		
Control of the service of		Preferred Years Experience, Skills, Training, Education		- L			_
Position Overview         Primary Purpose of Position       Test       Position Overview and Key Responsibilities and Related Competencies: Continue to enter posting information into any empty fields as needed.         Work Hours: From [time] to [time] on [days of week]       M-18-5pm         Key Responsibilities and Related Competencies         Required Competency       Applied Knowledge - HR Program and Organization         Description       Performs X, Y, and Z.         Required Competency       Customer Service         Description       Performs A, B, and C.         Required Competency       Communication - Verbal/Written         Description       Performs H.		Competency Profile	http://www.osp.state.nc.us/Guide/CompWebSite/Profiles/HR%	520Specialist%20Profile.pdf	Click to view Compete	ency Profile.	
Work Hours: From       M-f 8-5pm         Key Responsibilities and Related Competencies         Required Competency       Applied Knowledge - HR Program and Organization         Description       Performs X, Y, and Z.         Required Competency       Customer Service         Description       Performs A, B, and C.         Required Competency       Communication - Verbal/Written         Description       Performs H.	Prima Orga	Position ary Function of nizational Unit	Test	and Related enter postin	<u>Competencies</u> : Continue to og information into any emp	ty	
Key Responsibilities and Reduced CompetenciesRequired CompetenceApplied Knowledge - HR Program and OrganizationDescriptionPerforms X, Y, and Z.Required CompetenceCustomer ServiceDescriptionPerforms A, B, and C.Required CompetenceCommunication - Verbal/WrittenDescriptionPerforms H.	Work [time] to	k Hours: From o [time] on [days of week]	M-f 8-5pm		aea.		
Required CompetencyApplied Knowledge - HR Program and OrganizationDescriptionPerforms X, Y, and Z.Required CompetencyCustomer ServiceDescriptionPerforms A, B, and C.Required CompetencyCommunication - Verbal/WrittenDescriptionPerforms H.	Key Resp	onsibilities and F	Related Competencies				
DescriptionPerforms X, Y, and Z.Required CompetencyCustomer ServiceDescriptionPerforms A, B, and C.Required CompetencyCommunication - Verbal/WrittenDescriptionPerforms H.	Requir	ed Competency	Applied Knowledge - HR Pro	ogram and Organiza	ation		
Required CompetencyCustomer ServiceDescriptionPerforms A, B, and C.Required CompetencyCommunication - Verbal/WrittenDescriptionPerforms H.	D	escription	Performs X, Y, and Z.				
Description     Performs A, B, and C.       Required Competency     Communication - Verbal/Written       Description     Performs H.	Requir	ed Competency	Customer Service				
Required Competency     Communication - Verbal/Written       Description     Performs H.	Description		Performs A, B, and C.				
Description Performs H.	Requir	ed Competency	Communication - Verbal/Wri	itten			
	D	escription	Performs H.				

*	Working Title	Employee Relations Counselor (TLB10)	Position Information: Continue to
	Competency Level	Journey	enter posting information into any
	Position Number	TLB10	empty fields as needed.
*	JCAT	12345	
	Approved Salary	\$45,000	
*	Salary Grade Equivalent		
*	FLSA	Exempt	
*	Appointment Type	Permanent - Full-time	
	FTE		
	If Time Limited, Appointment Length	If time limited, please indicate budget end date. If funde	d from more than one fund, indicate earliest end date. This field canr

You can indicate other users you would like to have **Supervisor** and / or **Applicant Reviewer** access to the posting by searching for their name in the Supervisor and Applicant Reviewer fields. Indicate the proposed **Open Date** and **Close Date**, which will define the number of days applicants can view and apply for the posting. The minimum allowable posting period for SHRA positions is five (5) calendar days. Select the appropriate **Fast Find** category for the posting to ensure it is included in the correct pre-defined search when an applicant clicks on the corresponding Fast Find button through the applicant portal. Choices are Administrators and Research, Faculty, Post Doctoral, Temporary Staff, and Staff. For SHRA positions, the appropriate **Fast Find** selection is "Staff":

Posting Detail Informa	ion			Supervisor and / or
* Supervisor	Select Some Options	This field is re	equired.	Applicant Reviewer
* Applicant Reviewe	Select Some Options	This field is re	equired.	access to the posting.
Posting Number				
* Open Date	This field is required.	Minimum	allowable post	ing
* Close Date	This field is required.	period is fi	ve (5) calenda	r days.
Special Instructions Applicant	to		*	
* Fast Find Information	n Please select This field is req	sele suired.	ect the most ap I category for	opropriate Fast the posting.

Include details regarding any special advertising requests, such as posting the position on additional job posting websites or in specific print media outlets, in the **Advertising Summary** field. A link to the job posting on the North Carolina A&T State University applicant portal will be included in any special advertising. The **Pass Message** and **Fail Message** fields contain template notifications that will be sent to applicants who are screened out of the posting through **Supplemental Questions**. Once all fields on the Posting Details Tab are complete, click the Next button to save your changes and move to the next tab. You can also click the "Save" button if you wish to save your changes and keep working on the current tab.

Advertising Summary	Include any special advertising request information.
	Please list additional external advertising sources if different than standard advertising sources. Standard sources include: NC Employment Security Commission & UNC General Administration
* Pass Message	Thank you for your interest in this position. The screening and selection process is currently underway and will continue until a successful candidate is chosen. Should review of your qualifications result in a decision to pursue your candidacy, you will be contacted.
* Fail Message	Thank you for your interest in this position. Based on your responses to the questions on the employment application, you do not meet the minimum qualifications for this position. Please do not let this discourage you from applying for other positions that interest you.
	Save and Next buttons.

## <u>Create New SHRA Posting from a Position Description – Position Funding</u> <u>Information Tab</u>

In the Budget Advisory Approval section of this tab, state what mission specific, essential, and / or key objectives will not be met if the position is not filled. All recruitment of permanent EHRA and SHRA positions that are funded in whole or in part by **general state funds** requires approval by the University's Budget Advisory Committee:

Editing Posting	Position Funding Information	Save << Prev Next>>
<ul> <li>Posting Details</li> </ul>		
Position Funding Infor		
Supplemental Questions	Required information	
Applicant Documents	Budget Advisory Approval	
Search Committee	<ul> <li>All recruitment of permanent EPA and SPA positions that are funded in whole or in part by gene A&amp;T's Budget Advisory Committee. To receive consideration of the Committee's review process</li> </ul>	
Ranking Criteria	essential, and / or key objectives will not be met if the position is not filled.	State what mission
Posting Documents	*	specific, essential,
Summary	Mission Specific, Essential and/or Key Objectives not Met without position	and/or key objectives will not be met if position is not filled.

Funding Source information from prior posting will copy over into the fields in the Funding Source Details section of this tab, and you can make edits as necessary. **PLEASE NOTE:** The annual amount budgeted must support the hiring range indicated on the Posting Details Tab.

If you are unsure of what fund to use, the most up to date information may be found in **Banner Finance** on these forms:

1) FTVORGN- Provides a list of Org Codes

2) **FTVFUND**- Provides a list of Funds

3) FTVACCT- Provides a list of Accounts

These forms show listings of all active funds. For additional help, refer to the Banner Training Guide.

If the position has more than one funding source, click on the **Add Funding Source Details Entry** button and **"Save"** until all sources have been entered. **PLEASE NOTE:** Each time you add an additional entry, you will need to **scroll down below the last saved entry** to enter a new funding source. Once all funding sources have been added, click Next>>> to move to the next tab:

	·		
Funding Source Details			
Indicate the funding source must equal the requested	e(s) for this position. Click on "Add Funding Source salary.	Details Entry" to enter budget and other required codes. Select "SAVE" after each e	ntry. Please note that the annual amount budgeted
If the position has more th below the last saved entry	an one funding source, continue to select "Add Fur to enter a new funding source.	nding Source Details Entry" and "Save" until all sources are entered. Each time you a	dd an additional entry, you will need to scroll down.
State Appropriated * Funding / Non-State Appropriated Funding	State Appropriated Funding	Funding information	
If non-state, select source of funding	Please select	will be copied in from	
If other, designate source		the prior posting,	
* Budget Code	16070 (State)	which you can edit as	
* Fund	111111 Format: 6 digit number #######	necessary.	
* Org	11111 Format: 5 digit number ######		
* Account	11111 Format: 5 digit number ######		<b>IMPORANT NOTE:</b>
* Program	111 Format: 3 digit number ###		Remember to click
Date Funds End			funding course is
* Annual Amount	\$45,000	Click here to add a funding source. If	optored
* Percentage of FTE	1.0	the position has more than one funding	entered.
Remove Entry?     Add Funding Source Details E	intry	source, continue to click here until all funding sources are entered.	Save << Prev Next >>
			1

## <u>Create New SHRA Posting from a Position Description – Supplemental</u> <u>Questions Tab</u>

In the **Supplemental Questions** tab, you can identify screening questions related to an applicant's education and experience that must be answered as part of the application process. To add supplemental questions to your posting, click on the button labeled **"Add a Question"**. A pop up section will appear where you can add an existing question or submit a new one. Once done, click on the Next>>> button to save changes and proceed to the next tab:

Editing Posting	Supplemental Questions Save Verev Next>
Posting Details	Adding New Posting Questions: Click on the button labeled "Add a Question". A pop up section will appear where you can add an existing
Position Funding Infor	question or submit a new one.
Supplemental Questions	Adding Existing Posting Questions: There are two ways to search for approved posting questions to add to the job being posted. You can filter using the key word search or filter by question category.
Applicant Documents	Submitting New Posting Questions: To submit a new question for review and approval, click on the button labeled "Add a Question". When the
Search Committee	Available Supplemental Questions box opens, click on the "Add a New One" link in the bottom right hand corner.
Ranking Criteria	Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear where points and
Posting Documents	disqualitying responses can be associated to the posting question.
Summary	Posting Question Options: Once questions have been added to the posting, you will see a column of checkboxes to the left of each question; checking these boxes will make a question required.
	Included Supplemental Questions
	Click to add supplemental
	position Required Category Question questions.
	Save < Prov Navt SS

Adding Existing Posting Questions: There are two ways to search for approved posting questions to add to the job being posted. You can filter using the key word search or filter by question category. To add an existing question, click the check box next to the question you wish to add.

**Submitting New Posting Questions:** To submit a new question for review and approval, click on the button labeled "Add a Question". When the **Available Supplemental Questions** box opens, click on the **"Add a New One"** link in the bottom right hand corner.

Cateç	gory: Any	Keyword:		Filter supplemental questions by keyword or category.
Add	Category	Question		.,,
	Uncategorized	How did you hear about this employment opp	ortunity?	
	Experience	Do you have at least one year of responsible experience?	payroll or financial and stati	stical record keeping
	Education	Do you have a high school diploma or equiva	lent?	
	Experience	Do you have HR experience?		
	Education	Do you have a High School diploma?		V
	Education	Do you have a Master's Degree?		
	Education	Do you have a Master's Degree?		1
	Experience	How many years of Accounting experience de	o you have in a higher educa	ation setting?
	Education	Do you have a High School diploma?	Click to submit a cus	stom supplemental
	Experience	Do you have at least 4 years of experience?	question for review	and approval.
Dipl Click ch existing	aying all 10 leck box to ac g supplement	ld an al question.	Can't find the one you	u want? Add a new one

Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear where points and disqualifying responses can be associated to the posting question.

**Posting Question Options:** Once questions have been added to the posting, you will see a column of checkboxes to the left of each question; checking these boxes will make a question required.

Included	d Supplementa	al Questions				Add a q	uestion
Position	Required	Category	Question			Status	
1		Uncategorized	How did you hear about th	is employment opportunity?		active	×
2		Experience	Do you have at least one y keeping experience?	vear of responsible payroll or financial and s	tatistical record	active	8
3		Education	Do you have a High Scho	L Palace O	1	active	8
4		Experience	How many years of Accou	Assign points to answers.	ucation setting?	active	•
T.			Possible Answers: Predef	ined Options			
	Click to me	ko guastians	Answer	Points	Disqualifying		
	CIICK LO IIIa	ake questions	1. 0 years				
	required.		2. 1-3 years				
			3. 4-5 years				
			4. 5+ years				
Reord	er question	s.		Click to assign disqualifying	answers.		lext >>

# <u>Create New SHRA Posting from a Position Description – Applicant</u> <u>Documents Tab</u>

In the **Applicant Documents** tab, Applicant documents can be included in the application process by selecting **Included** to make the documents optional and **Required and Included** to make the document(s) mandatory to complete the application process. Documents attached by the applicant during the application process will be accessible for viewing during applicant review. Once done, click on the Next>> button to save changes and proceed to the next tab:

<b>sting</b> Details	Click Inclue uploading	ded to make a document	optional.	Click <u>bo</u> make u	a <mark>th</mark> Included <u>and</u> Required to ploading a document required.
ition Funding Infor	Included to mak	e the document(s) ma	ndatory to complete	he application proc	cess.
pplemental Questions	Order Name	9	Included?	Required?	
pplicant Documents	1 Resur	ne			
Search Committee					
Ranking Criteria	2 Cover	Letter			
Posting Documents			_		
Summary	3 Curric	ulum Vitae			
	4 Teach	ing Philosophy			
	5 Letter	Of Reference 1			
	6 Letter	Of Reference 2			
	7 Letter	Of Reference 3			

### <u>Create New SHRA Posting from a Position Description – Search</u> <u>Committee Tab</u>

Search Committees are advisory in nature and serve the purpose of recruiting a qualified applicant pool, reviewing their credentials, and recommending acceptable candidates to the hiring manager. Search Committees can consist of University employees both internal and external to the hiring unit, as well as individuals external to the University who represent key stakeholders.

In the **Search Committee** tab, you can assign search committee members who will have access to review application information for a specific posting. Search committee members can view applications, applicant documents, and evaluate / rank applicants based upon ranking criteria you establish as part of the posting. Requests to add search committee members will be reviewed and approved by the Division of human Resources (DHR) once the posting request is routed to DHR for approval. Upon DHR approving a search<sup>25</sup>

committee member's access, the search committee member will receive an e-mail notification with instructions on how to access the online posting and related application information:

Editing Posting	Search Committee	Save <> Prev Next >>
Posting Details	Search Committees are advisory in nature	and same the purpose of recruiting a qualified applicant pool, reviewing their credentials, and
Position Funding Infor	recommending acceptable candidates to	the hiring manager. Search Committees can consist of University employees both internal and externa
Supplemental Questions	to the hiring unit, as well as individuals ex	ternal to the University who represent key stakeholders.
Applicant Documents	Search Committee Members	
Search Committee	No Search Committee Members have bee	en assigned to this Posting yet.
Ranking Criteria	Search	
Posting Documents	Search	
Summary	Find a User to assign as a Search Comm	ittee Member.
	First Name	
	Last Name	To search for a pre-approved search
	Encell Address	

After searching for a pre-approved search committee member, click on the **Add Member** button to add them to your search committee. You can also make a search committee member the chair of the search committee by clicking on the check box next to **"Make Member the Committee Chair"**:

Search Committee M	embers
No Search Committee Men	bers have been a Click the check box to assign the
Search	search committee member as the committee chair.
Find a User to assign as a	Search Committee Memer.
Name Email Address	Add Member
Lonnie Crotts emailaddress@	zed.zed Add Member Imake Member The Committee Chair
First Name Lonnie	
Last Name Octo	Click the Add Member button to add
Last Name Crotts	the search committee member you
Email Address	searched for.
Search	

To create an account for a new search committee member, enter in the committee member's name, current e-mail address, and desired username, then click on the **Submit** button:

New Search Committee Member		
Request that someone be granted access to the syste	m for the purpose of serving as a Search Committee Member.	
Required fields are indicated with an asterisk (*).		
Account Information		
Please enter the following information to create an	account for a new Search Committee Member	
* First Name		
* Last Name	To create an account for a new	
* Email	search committee member, complete	
* Username	the fields and click submit.	400
Submit		120

If the requested search committee member is already an assigned user of the PeopleAdmin system, their user account information will be displayed, and you can add them to your search committee by clicking on the **Add User** button:

Mat Username First Name	ambraun Amy Broun	
Last Name Email Preferred Group Add User	emailaddress@zed.zed • Employee	Click the Add User button to add the new search committee member in a pending status. Access will be reviewed and
New Search C Request that some Required fields are	committee Member eone be granted access to the sys e indicated with an asterisk (*).	approved by DHR.
Account Informa	tion	
Please enter the First Nam Last Nam Email Username Submit	following information to create a e Amy Braun ambraun@ncat.edu ambraun	an account for a new Search Committee Member.
		Save << Prev

# <u>Create New SHRA Posting from a Position Description – Ranking</u> <u>Criteria Tab</u>

**Ranking Criteria** can be used by search committees during the applicant review process to rank applicants based upon job-related experience and education factors. This optional tool can be helpful in identifying the most qualified candidates in an applicant pool. Ranking criteria are not presented to the applicant:

tings / SPA / Employee Relations Coun	selor (TLB10) (Draft) / Edit: Ranking Criteria		
Editing Posting	Ranking Criteria	Save	e << Prev Next >
<ul> <li>Posting Details</li> </ul>	Ranking Criteria can be used used by sear	h committees during the applicant review process to rank applicants based up	pon job-related
Position Funding Infor	<ul> <li>experience and education factors. This opti- criteria are not presented to the applicant.</li> </ul>	onal tool can be helpful in identifying the most qualified candidates in an applic	cant pool. Ranking
Supplemental Questions	Adding New Ranking Criteria: Click on the	utton labeled "Add a Criterion". A dialog box will appear where you can add a	n existing criterion by
Applicant Documents	checking the box in the "Add" column or su	omit a new one for approval.	
Search Committee	the Available Evaluative Criteria box opens	a new ranking enterior for review and approval click on the button labered "A click on the "Ad	Add a Criterion". Whe
Ranking Criteria	Included Evaluative Criteria	Click to add ranking criteria	Add a Criterio
Posting Documents	Category Description	s check to add ranking effectia.	Status
0			

To add ranking criteria, click on the button labeled **"Add a Criterion"**. A dialog box will appear where you can add an existing criterion by checking the box in the "Add" column or submit a new one for approval. To submit a new ranking criterion for review and approval, click on the button labeled **"Add a Criterion,"** then click on the **"Add a new one"** link in the bottom right hand corner of the dialog box that opens:

Cateo Add	gory: Any ▼ Category	Keyword: Description			Search for ranking criteria b keyword or category.
	Circulogonzou	Possible Answers: 1. 1 2. 2 3. 3 4. 4 5. 5 Applicant workflow sta	Indicate the app that allows an a ate Under Review by HR	plicant work	cflow state be ranked.
	Uncategorized Uncategorized	Please rate the candidate Teaching experience in a	es experience related to th a university	Click to su criterion f	ubmit a custom ranking for review and approval.

Editing Posting	Ranking Crite	ria	Click Save or N	Next to	move	Save	e << Pi	rev Nex
Posting Details	Ranking Criteria ca	an be used used by search com	to the next ta	b.	plica	ints based up	on job-re	elated
Position Funding Infor	experience and ed criteria are not pres	ucation factors. This optional to sented to the applicant.	or can be noipiar in lachary	ing the most	quannea canaldate	s in an applic	ant pool.	Ranking
Supplemental Questions	Adding New Ranki	ng Criteria: Click on the button l	abeled "Add a Criterion". A	dialog box	will appear where ye	ou can add ar	n existing	criterion b
Applicant Documents	checking the box in the "Add" column or submit a new one for approval.							
	0 L 10 L D		11 N N N N N					
<ul> <li>Search Committee</li> </ul>	Submitting New Ra the Available Evalu	anking Criteria: To submit a new uative Criteria box opens, click o	ranking criterion for review on the "Add a new one" link	w and approv in the botto	val, click on the butt m right hand corner	on labeled "A	dd a Crit	erion". Wh
Search Committee      Ranking Criteria	Submitting New Ra the Available Evalu	anking Criteria: To submit a new Jative Criteria box opens, click o <b>ve Criteria</b>	/ ranking criterion for review n the "Add a new one" link	w and approv in the botto	val, click on the butt m right hand corner	on labeled "A	dd a Crit	erion". Wh Add a Crite
<ul> <li>Search Committee</li> <li>Ranking Criteria</li> <li>Posting Documents</li> </ul>	Submitting New Ra the Available Evalu Included Evaluati Category	anking Criteria: To submit a new Jative Criteria box opens, click o ve Criteria Description	v ranking criterion for reviev on the "Add a new one" link	w and approv in the botto Weight	val, click on the butt m right hand corner Workflow State	on labeled "A Status	dd a Crit	erion". Wh Add a Crite
<ul> <li>Search Committee</li> <li>Ranking Criteria</li> <li>Posting Documents</li> <li>Summary</li> </ul>	Submitting New Ra the Available Evalu Included Evaluati Category Uncategorized	anking Criteria: To submit a new Jative Criteria box opens, click o ve Criteria Description Teaching experience in a univ	r ranking criterion for review n the "Add a new one" link versity	w and approv t in the botto Weight	val, click on the butt m right hand corner Workflow State Under Review by Dept/Committee	on labeled "A Status active	dd a Crit	erion <sup>»</sup> . Wh Add a Crite
<ul> <li>Search Committee</li> <li>Ranking Criteria</li> <li>Posting Documents</li> <li>Summary</li> </ul>	Submitting New Ra the Available Evalu Included Evaluati Category Uncategorized Uncategorized	anking Criteria: To submit a new Jative Criteria box opens, click o ve Criteria Description Teaching experience in a univ Please rate the candidates ex	r ranking criterion for review n the "Add a new one" link versity sperience related to the job:	w and approv t in the botto Weight	val, click on the butt m right hand corner Workflow State Under Review by Dept/Committee Under Review by Dept/Committee	on labeled "A Status active active	dd a Crit	erion". Wh Add a Crite

# <u>Create New SHRA Posting from a Position Description –</u> <u>Posting Documents Tab</u>

The **Posting Documents Tab** allows you to upload documents as attachments that will route with the posting request through the approval workflow. Attachments can be uploaded as follows:

- **Upload New:** Choose this option if you want to upload a file from your computer.
- **Create New:** Choose this option if you want to create a new file to attach using the PeopleAdmin editor.
- **Choose Existing:** Choose this option if you want to attach a file that has already been uploaded into PeopleAdmin as part of another action.

Excel and Word documents may be attached. PDF conversion must be completed for the document to be valid when applicable:

ings / SPA / Employee Relations Cour	nselor (TLB10) (Draft) / Edit: Posting Documents	
Editing Posting	Posting Documents	Save <> Prev Next >>
Posting Details	To add a document to the posting, hover over the blue Action text link to the right of the document name.	
Position Funding Infor	Documents can be uploaded by browsing for the document or a document can be written or previously selected.	. Document types that are
Supplemental Questions	supported as attachment include .doc, .docx, .pdf, .rtf, .tw .twt tiff tif ince ince ince ince ince and view All de converted to .pdf for security.	ecumente unleaded will be
Applicant Documents	PDF conversion must be completed for the document to	pload New,
Search Committee	Document Type Name Status (Actions) Create New, or Choose Existin	ng in order
Ranking Criteria	Marketing Plan Actions to upload an attachment.	
	Print Ad Text Upload New	
Posting Documents		

#### **Create New SHRA Posting from a Position Description – Summary Tab**

The **Summary Tab** allows you to perform a final review all of the posting information you've entered on the previous tabs prior to sending the request to the next step in the approval workflow. Please review the details of the posting summary carefully before continuing.

The Blue Circle Check appears by those tabs for which all required information has been entered:

Posting	s / SPA / Employee Relations Counselor (TLB1	10) (Draft) / Summary		
	Posting: Employee Relation       (SPA)     Edit       Current Status: Draft     Position Type: SPA       Section/Unit VC for Human     G       Resources     G       Summary     History	ns Counselor (TLB10) Created by: Linc Butter Owner: Linc Butter Himg Proposals Associated Position Description		Take Action On Posting v <ul> <li>See how Posting looks to Applicant</li> <li>Print Preview (Applicant View)</li> <li>Print Preview</li> </ul>
	Please review the details of the posi- To take the action, select the approg appears. When you are ready to sul To edit the posting, click on the Edit this section and make necessary co	ting carefully before continuing. priate Workflow Action by hovering over the orange "Take Action on this bmit your posting, click on the Submit button on the popup box. It link next to the Section Name in the Summary Section. This will take your prections before moving to the next step in the workflow.	Posting" button. You may add a Comment to the posting and also add this post ou directly to the <b>Posting Page</b> to Edit. If a section has an orange icon with an	ting to your Watch List. in the popup box that exclamation point, you will need to review
	Posting Details Edit Classification Information If the details below are incorrect	Click "Edit" to make edit	ts to a tab.	
В	lue Circle Check	Human Resources Specialist 11804		
	Classification Type	SPA		
	Salary Range	\$29,700 - \$58,108		

An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save"**, and then return to the **Summary Tab** by clicking on the link in the left column:

Position Funding Informa	ation Edit	Click "Edit" to make edits to a tab.	
Budget Advisory Approval	•		J
Orange Circle Exclamation Point	EPA and SPA positi deration of the Comr	ons that are funded in whole or in part by general state fur nittee's review process, state below what mission specific	nds requires approval by A&T's Budget Advisory essential, and / or key objectives will not be met if the
Mission Specific, Essentia and/or Key Objectives not M without position	al Test Met		

Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example, the appropriate routing action is **"Send to Department Head (Move to Department Head)"**:

North Carolina		Inbox	PeopleAdmin
4 A&T STATE UNIVERSITY		Watch List	APPLICANT TRACKING
	Home Postings Hiring Proposals   My Profile	Help	
		Linc Butler, you have 0 messages. Supervisor	logout
Postings / SPA / Employee Relations Counselor (TLB10) (Draft) Posting: Employee Relations Co (SPA) Edit Current Status: Draft Position Type: SPA Section/Unit VC for Human Resources Summary History Settings Hiring Please review the details of the posting care To take the action, select the appropriate W and also add this posting to your Watch Liss	V Summary Click on "Take Action On Pending Request", then select "Send to Department Head" to move the request to the next step in the approval workflow. efully before continuing. Forkflow Action by hovering over the orange "Take Action on this is, in the popup box that appears. When you are ready to submit the second s	Take Action On Posting • WORKFLOW ACTIONS Keep working on this Posting Canceled (move to Canceled Send to Department Head (n Department Head) s Posting" button. You may add a Comment t your posting, click on the <b>Submit</b> button on th	o the posting he popup

You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send the action to the next level in the approval workflow, click the **"Submit"** button:

Take Action	
Send to Department Head (move to Department Head)	
Comments (optional)	Comments are optional and can be
	viewed by the next level approver in the History tab.
Add this pending request to your watch list?	Adding the action to your Watch List allows you to easily track and monitor the action's progress.
Submit Cancel	

If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation:

"Fund" is required and All required fields must be set before transitioning.		8
North Carolina Aget State University	Watch List	APPLICANT TRACKING
Red bar indicating the required fields that need to be completed before submitting the	Linc Butler, you have 0 messages. Supervisor	C logout
request to the next step in the workflow.	Take Action On Posting •	

Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

Posting was successfully transitioned			8
A&T STATE UNIVERSITY	Watch List	APPLICANT TRACKING	
Home Postings Hiring Proposals   My Profile Help			
Green confirmation bar indicating the Pending	ges. Supervisor	C C	logout
Request was successfully transitioned and			
added to your Watch List.			
(SPA) Current Status: Department Head	Posting looks to	Applicant	

The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

## <u>Create New SHRA Posting from a Position Description - Saving to</u> <u>Return to a Pending Request Later</u>

On the **Summary Tab** is an important menu item which should be selected if you need to stop a work session on the posting before submitting it to the next level for approval. Following this step will ensure that all your work is saved when you open the request for completion.

- 1) Click the "Save" button located in either the top or bottom right corner
- 2) Select "Summary" from the Tab List (illustrated above)
- 3) Select "Keep Working on this Posting"

ostings	s / EPA / Employee Relations Counsel	or (TLB10) (Draft) / Summary					
	Posting: Employee Re (EPA) Edit Current Status: Draft Position Type: EPA Section/Unit: VC for Human Resources	Created by: Linc Butler Owner: Linc Butler	ſLB10)		Take Action On WORKFLOW ACT Keep working Canceled (mo Send to Depa Department H	Posting v rows on this Posting ve to Canceled) tment Head (move to ead)	
	Summary History Settin	gs Hiring Proposals	Associated Po	osition Description			

4) Add any Comments into the window that opens (below) as notes to yourself, if desired.

#### 5) Click "Submit"



The **Posting** can be located when you log into the Applicant Tracking module again as the same **User Type** you used to begin the action. Hover your cursor over the **Postings tab** and click on "**SHRA**" You will then return to the **SHRA Postings view**, which provides a list of all postings based on your active user type, from which you can search for and select this posting and continue.

#### **Create New EHRA Posting**

To initiate a **Create New EHRA Posting** request, hover your cursor over the **Postings** tab and click on "EHRA", or click on the **Create New EHRA Posting** link located in the **Shortcuts** menu to the right of your

A&T STATE UNIVERSITY						Watch List	APPLICANT TRACKI
	Home Postin	gs Hiring Proposals	My Profile	Help			
lover curser over Bestings	SPA EPA			Linc Butler, you	have 0 messages.	Supervisor	
ab and aliak on FUDA	Post	octoral					
Nelcome to your Online Recruitment :	and Position Mana	rement System					
Welcome to your Online Recruitment a	and Position Manag	gement System			Shortcuts		
Welcome to your Online Recruitment a	and Position Manag	gement System	ew EHRA		Shortcuts Create New Si Create New El	SPA Posting	
Welcome to your Online Recruitment a C Inbox (14 items need your attention) Displaying items for group "Supervisor". Postings (3) Hiring Proposals (0) Pending Requese	and Position Manag Or cli Posti	gement System ck on Create No ng in the Shorto	ew EHRA cuts menu.	]	Shortcuts Create New S Create New E Create New Pr	SPA Posting PA Posting Post Doctoral Po	bsting

You will then be taken to the **EHRA Postings** view, which provides a list of all current/pending EHRA postings initiated based on your active user type as follows:

Active User Type	Positions in Position Descriptions List
Supervisor	Current / pending postings for positions that are direct reports to the Supervisor only.
Department Head	Current / pending postings for all positions that report to the department the Department Head is assigned to.
Dean / Vice Chancellor	Current / pending postings for all positions within the School, College, or Division the Dean / Vice Chancellor is assigned to.

In the **EHRA Postings** view, you can search postings by any number of criteria, including but not limited to position title, posting number, position number, department name, supervisor name, or workflow state. Searches are fully customizable by position and posting attributes, and you can save custom searches for use again later:

4	NORTH CAROLINA ART STATE UNIVERSITY		Henry Bastland, Hision Pressenter, J. M. Broffer, Unit		C	Inbox PeopleAdmin APPLICANT TRACKING
Postings	/ EPA A Postings		nune Posings ning Poposas ( wy rowe reg	Active user type Supervisor.	e is	Supervisor C logo
	Con Sand Search Search Add Column Death Column Death of Column Western Head Death Head Death Head Death New Characters Death New Charac	Statch Hide search opt	Searches are position attri saved for late	customizable by ibutes and can be er use.		
Ad P	All Postings (25 Items Found)					Actions
	Position Title	Posting Number	Department	Active Applications	Workflow State	(Actions)
	Director of Federal Policy Compliance		VC for Human Resources	0	Draft	Actions
	Asst VC-Human Resources		VC for Human Resources	0	Draft	Actions •
	Asst VC-Human Resources		VC for Human Resources	0	Draft	Actions
	Asst VC-Human Resources		VC for Human Resources	0	Draft	Actions •
	Asst VC-Human Resources - LC		VC for Human Resources	0	Posted	Actionsv
	Director-Employee Rel. AA		Employee Relations	0	Draft	Actions
	Administrative Support Assoc - LC		Classification & Compensation	0	Closed	Actions
	Administrative Support Assoc - LC		Classification & Compensation	0	Draft	Actions •

To initiate the request, click on the orange **Create New Position Description** button located on the top right of the screen just below the grey bar:

Home	Postings	Hiring Proposals	I My Profile	Help		Inbox Watch List	PeopleAdmin Applicant tracking	•
					Linc Butler, you have 0 messages.	Supervisor	r 💌 C	logout
Search Mo	re search onling	19			Click here to initiate a Create New Posting request.		Create New Posting	

You will then see the **Create New** menu, asking what you would like to use to create the new posting:



#### Create New EHRA Posting – Create from Posting

Select **Create from Posting** if you have previously posted a position in the PeopleAdmin system and wish to post a position using the same or similar information from that prior posting.

**<u>PLEASE NOTE</u>**: If the position classification and/or the position description details have changed, you must start a Modify Position action in the Position Management module prior to posting the position.

Choosing the **Create from Posting** option copies information from an existing posting into a new posting:

Create New	×
What would you like to use to create this new posting?	
Create from Posting	
Uses an existing posting as a template and automatically copies in mos information.	st
Create from Position Description	
Copies in most of the information from a position description.	

After clicking on **Create from Posting,** you will be taken to the **EHRA Postings** view, where you can search postings by any number of criteria, including but not limited to position title, posting number, position number, department name, supervisor name, or workflow state. Searches are fully customizable by position and posting attributes, and you can save custom searches for use again later. If you need assistance in finding the desired posting, please contact a <u>Recruitment Coordinator</u> in the Division of Human Resources:

	NORTH CAROLINA ART STATE UNPERSITY	Home Po	stings Hiring Proposals   My Profile Help			Inbox PeopleAdmin Watch List APPLICANT TRACKING T
Postings EP4	/ EPA A Postings			Active user typ Supervisor.	be is	s Supervisor 💌 🔊 logout
c	Search y Search Add Column Add Column Cont Search Worktow State: Segret is a Column Department Head Department	Search. Hide search options	Searches are c position attrib	ustomizable by outes and can be		
	Department / pending		saved for face	use.	J	Actions drop down menu.
Ad he	EHRA postings by active					
	Position Title	Posting Number	Department	Active Applications	Workflow State	(Actions)
	Director of Federal Policy Compliance		VC for Human Resources	0	Draft	Actions
	Asst VC-Human Resources		VC for Human Resources	0	Draft	Actions
	Asst VC-Human Resources		VC for Human Resources	0	Draft	Actions
	Asst VC-Human Resources		VC for Human Resources	0	Draft	Actions
	Asst VC-Human Resources - LC		VC for Human Resources	0	Posted	Actionsv
	Director-Employee Rel. AA		Employee Relations	0	Draft	Actionsv
	Administrative Support Associ-LC Administrative Support Associ-LC		Classification & Compensation	0	Closed	Actions •

Once you locate the posting you wish to create from, you can select it by moving your cursor over that posting's corresponding Actions drop down menu located in the far right column and clicking on **Create From**. This drop down menu will also give you the option of **View Posting** if you wish to view the information associated with a particular posting prior to selecting **Create From**:



By clicking **Create From**, the **New Posting** form will appear. This is where you can update the working title of the position for the purpose of posting, and view **Organizational Unit** information to confirm accuracy. You can also provide **Special Offline Application Instructions** in the field provided if necessary. Once all information is entered and confirmed on the **New Posting** page, click on the orange

**Create New Posting** button to begin updating posting information:

	Home Postings Hiring Proposals	My Profile Help	
			Linc Butler, you have 0 messages. Supervisor 💌 C logout
Postings / EPA / New Posting			
New Posting  • Required Information Position Title	Assistant Director for HR Systems	Create new posting button.	Create New Posting Cancel
Organizational Unit Division/School/College	VC for Human Resources	Confirm Organization information.	nal Unit
Department *	VC for Human Resources		
Online Applications I Accept online applications?	r		
Special offline application instructions		Include special offline application instructions if necessary.	Create new posting button.
	L		Create New Posting Cancel

#### <u>Create New EHRA Posting from an Existing Posting – Edit Posting</u>

After clicking on the "**Create New Posting**" button, you will then be taken to the **Posting Details tab**, the first information tab that must be completed before the new **EHRA Posting** can be sent to the next step in the approval workflow. Each information tab is listed on the **Edit Posting** page in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while **EditStivel** appear as blue links.

You can save the changes you've made to the active tab you're working on and navigate to the next tab in the list simultaneously by clicking the Next>>> button located in both the top and bottom right corners of the page. You can save the active tab you're working on and stay on the same tab by clicking the "Save" button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column; however, this action WILL NOT save any changes made to the tab you are navigating away from.

Required fields are highlighted in <u>red</u> and must be filled in before the new **EHRA Posting** can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check Circle** also appears next to tabs that do not contain any required fields:

Tah list	Home	Postings Hiring Proposals   My F	Profile Help	_
			Linc Butler, you have 0 messages. Supervisor	C logout
Postings / E A / Assistant Director for HR	Systems (Draft) / Edit: Posting Details			
		-	<b>_</b>	
Editing Posting	Posting Details		Save and Next buttons.	e Next >>
Posting Details	All Chack applying	L		
Position Funding Infor				
Supplemental Questions	<ul> <li>To create a Posting, first con Proceed through all sections</li> </ul>	mplete the information on this screen, ther s completing all necessary information. To	n click the <b>Next</b> button or select the page in the left hand navig o submit the Posting to the next approval step, you must go to t	ation menu. the <b>Posting</b>
Applicant Documents	Summary Page by clicking navigation menu. Once a su	on the Next button until you reach the Pos mmary page appears, hover your mouse	sting Summary Page or select Posting Summary Page from th over the orange Action button for a list of possible approval ste	e left
References/Letters of	* Required Information			ip opuono.
Search Committee	Classification Information			
Ranking Criteria	HELP TEXT: If the details	below are incorrect, please make the a	ppropriate Classification selection using the "Classification	' Tab on the
Posting Documents	left side menu while modif	ying the Position.		
Summary	Position/Classification Title	Assistant Director		
	Job Code	82229		
Blue Check Circle	Classification Type	EPA		
	* Salany Danga		This field is required. Required fields are	e in <u>RED</u> .
	Salary Range	Enter salary to be advertised amount or a des	scription such as "commensurate with education and experience" 13	0

# Create New EHRA Posting from an Existing Posting – Posting Details Tab

Since you are creating a new **EHRA Posting** from an existing one, many of the fields will already be filled in with information copied from the existing posting. Follow the instructions at the top of the page to complete any remaining required fields, the Next>> the button to save changes and navigate to the next tab:

Editing Posting	Posting Details		Save and Next buttons	
Posting Details	Chock spelling		Save and Next Buttons.	
Position Funding Infor				
Supplemental Questions	<ul> <li>To create a Posting, first cor Proceed through all sections</li> </ul>	mplete the information on this s completing all necessary inf	screen, then click the <b>Next</b> button or select the page in the left hand navigation meni ormation. To submit the Posting to the next approval step, you must go to the <b>Postin</b>	
Applicant Documents Summary Page by clicking on the Next button until you reach the Posting Summary Page or select Posting Summary Page from the left navigation menu. Once a summary page appears, hover your mouse over the orange Action button for a list of possible approval step op				
References/Letters of	* Required Information	, , , , , , , , , , , , , , , , , , ,		
Search Committee	Classification Information			
Ranking Criteria	HELP TEXT: If the details	below are incorrect please	make the appropriate Classification selection using the "Classification' Tab on t	
Posting Documents	left side menu while modify	ying the Position.		
Summary	Position/Classification Title	Assistant Director	Fields from the existing posting will be	
	Job Code	82229	copied in to your new posting.	
	Classification Type	EPA		
	* Salany Pango	\$55,000 - \$60,000		
	Salary Range	Enter salary to be advertised a	mount or a description such as "commensurate with education and experience"	

P	osition Overview			
	Primary Purpose of Position	Test	Continue to enter or modify	
	Primary Function of Organizational Unit	Test	posting information into any empty and/or required fields as needed	
P	osition Information		neeueu.	
*	Position Title	Assistant Director for HR Systems		
*	Working Title	Assistant Director fo HR Systems		
	Position Number	000127		
*	JCAT	194X03		
	Approved Salary	\$60,000		
*	FLSA	Exempt		
*	Appointment Type	Permanent - Full-time		
*	Tenure Track	No		
	FTE	1 = 40 hours/week, 12 months		
*	<ul> <li>If Time Limited, Appointment Length</li> <li>If time limited, please indicate budget end date. If funded from more than one fund, indicate earliest end date. This field cannot left blank if the "Time Limited" field above is checked selected."</li> </ul>			

You can indicate other users you would like to have **Supervisor** and / or **Applicant Reviewer** access to the posting by searching for their name in the Supervisor and Applicant Reviewer fields. Indicate the proposed **Open Date** and **Date Desired for Closing or Initial Review (minimum 30 days)**, which will define the number of days applicants can view and apply for the posting. The minimum allowable posting period for EHRA positions is thirty (30) calendar days, however, an EHRA posting can be posted as open until filled. Select the appropriate **Fast Find** category for the posting to ensure it is included in the correct pre-defined search when an applicant clicks on the corresponding Fast Find button through the applicant portal. Choices are Administrators and Research, Faculty, Post Doctoral, Temporary Staff, and Staff:

Posting Detail Information			Supervisor
* Supervisor	Select Some Options Th	is field is required.	Applicant Reviewer
* Applicant Reviewer	Select Some Options Th	is field is required.	access to
Posting Number			the posting.
* Open Date	This field is required.		
Date desired for closing or initial review ( minimum 30 days).		Minimum allowak period is thirty (30	ole posting D) calendar
Close Date		days. Posting can	also be open
Open Until Filled	No	until micu.	
<ul> <li>Special Instructions to Applicant</li> </ul>		✓ This field	is required.
* Fast Find Information	Please select This field is required.	Select the most	appropriate Fa

Include details regarding any special advertising requests, such as posting the position on additional job posting websites or in specific print media outlets, in the **Advertising Summary** field. A link to the job posting on the North Carolina A&T State University applicant portal will be included in any special advertising. The **Pass Message** and **Fail Message** fields contain template notifications that will be sent to applicants who are screened out of the posting through **Supplemental Questions**. Once all fields on the Posting Details Tab are complete, click the Next button to save your changes and move to the next tab. You can also click the "Save" button if you wish to save your changes and keep working on the current tab.

Advertising Summary	Include any special advertising request information.	
	Please list additional external advertising sources if different than standard advertising sources. Standard sources include: NC Employment Security Commission & UNC General Administration	
* Pass Message	Thank you for your interest in this position. The screening and selection process is currently underway and will continue until a successful candidate is chosen. Should review of your qualifications result in a decision to pursue your candidacy, you will be contacted.	
* Fail Message	Thank you for your interest in this position. Based on your responses to the questions on the employment application, you do not meet the minimum qualifications for this position. Please do not let this discourage you from applying for other positions that interest you.	
	Save and Next buttons.	138t >>

# <u>Create New EHRA Posting from an Existing Posting – Position Funding</u> <u>Information Tab</u>

In the Budget Advisory Approval section of this tab, state what mission specific, essential, and / or key objectives will not be met if the position is not filled. All recruitment of permanent EHRA and SHRA positions that are funded in whole or in part by **general state funds** requires approval by the University's Budget Advisory Committee:

		Linc Butler, you have 0 mes	sages. Supervisor	- C
ings / EPA / Assistant Director for HR S	ystems (Draft) / Edit: Position Fundin	g Information		
Editing Posting	Position Funding Info	ormation	Save << Prev	Next >>
Posting Details				
Position Funding Infor	Check spelling			
Supplemental Questions	- Required information			
Applicant Documents	Budget Advisory Approval			
References/Letters of	All recruitment of permaner A&T's Budget Advisory Cor	nt EPA and SPA positions that are funded in whole or in part by gener mmittee. To receive consideration of the Committee's review process		•
Search Committee	essential, and / or key obje	ctives will not be met if the position is not filled.	State what miss	ion
Ranking Criteria		Test	specific, essenti	al,
Posting Documents	Mission Specific, Essential and/or Key		and/or key obje	ectives
Summary	Objectives not Met without position		will not be met	if
		+	position is not f	illed.
	Funding Source Details			

Funding Source information from the prior posting will copy over into the fields in the Funding Source Details section of this tab, and you can make edits as necessary. **PLEASE NOTE:** The annual amount budgeted must support the hiring range indicated on the Posting Details Tab.

If you are unsure of what fund to use, the most up to date information may be found in **Banner Finance** on these forms:

1) FTVORGN- Provides a list of Org Codes

2) **FTVFUND**- Provides a list of Funds

3) **FTVACCT**- Provides a list of Accounts

These forms show listings of all active funds. For additional help, refer to the Banner Training Guide.

If the position has more than one funding source, click on the **Add Funding Source Details Entry** button and **"Save"** until all sources have been entered. **PLEASE NOTE:** Each time you add an additional entry, you will need to **scroll down below the last saved entry** to enter a new funding source. Once all funding sources have been added, click Next>>> to move to the next tab:

Funding Source Details	Funding Source Details								
Indicate the funding source(s) for this position. Click on "Add Funding Source Details Entry" to enter budget and other required codes. Select "SAVE" after each entry. Please note that the annual amount budgeted must equal the requested salary.									
If the position has more the below the last saved entry	If the position has more than one funding source, continue to select "Add Funding Source Details Entry" and "Save" until all sources are entered. Each time you add an additional entry, you will need to scroll down below the last saved entry to enter a new funding source.								
State Appropriated * Funding / Non-State Appropriated Funding	State Appropriated Funding	Funding information							
If non-state, select source of funding	Please select	will be copied in from							
If other, designate source		the prior posting,							
* Budget Code	16070 (State)	which you can edit as							
* Fund	111111 Format: 6 digit number #######	necessary.							
• Org	11111 Format: 5 digit number ######								
* Account	11111 Format: 5 digit number ######		<b>IMPORANT NOTE:</b>						
* Program	111 Format: 3 digit number ###		Remember to click						
Date Funds End			Save after each						
<ul> <li>Annual Amount</li> </ul>	\$45,000	Click here to add a funding source. If	funding source is entered.						
* Percentage of FTE	1.0	the position has more than one funding							
Remove Entry?		source, continue to click here until all							
Add Funding Source Details En	ntry	funding sources are entered.	Save << Prev Next >>						

# <u>Create New EHRA Posting from an Existing Posting – Supplemental</u> <u>Questions Tab</u>

In the **Supplemental Questions** tab, you can identify screening questions related to an applicant's education and experience that must be answered as part of the application process. To add supplemental questions to your posting, click on the button labeled **"Add a Question"**. A pop up section will appear where you can add an existing question or submit a new one. Onc Next>>>, click on the button to save changes and proceed to the next tab:

Editing Posting	Supplemental Questions		Save << Prev Next		
Posting Details	Adding New Posting Questions: Click on the button labele	d "Add a Question". A pop up section will appear where y	ou can add an existing		
Position Funding Infor	question or submit a new one.				
Supplemental Questions	Adding Existing Posting Questions: There are two ways to using the key word search or filter by guestion category.	search for approved posting questions to add to the job t	being posted. You can filter		
Applicant Documents	Submitting New Posting Questions: To submit a new gues	stion for review and approval, click on the button labeled "	Add a Question" When the		
References/Letters of	Available Supplemental Questions box opens, click on the	"Add a New One" link in the bottom right hand corner.			
Search Committee	Assign Points or Disqualifying Responses: Click on the qu	estion that has been added and a dropdown menu will ap	pear where points and		
Ranking Criteria	disqualifying responses can be associated to the posting of	question.			
Posting Documents	Posting Question Options: Once questions have been add checking these boxes will make a question required.	led to the posting, you will see a column of checkboxes to	the left of each question;		
Summary	Included Supplemental Questions	Click to add supplemental	Add a questi		
	Position Required Category Q	question questions.	Statu		

Adding Existing Posting Questions: There are two ways to search for approved posting questions to add to the job being posted. You can filter using the key word search or filter by question category. To add an existing question, click the check box next to the question you wish to add.

**Submitting New Posting Questions:** To submit a new question for review and approval, click on the button labeled "Add a Question". When the **Available Supplemental Questions** box opens, click on the **"Add a New One"** link in the bottom right hand corner.

	Add a	Question					×	
L	Available Supplemental Questions							
l	Cate	gory: Any	Keyword	:			Filter supplemental quest by keyword or category.	tions
Ŀ	Auu	Uncategorized	How did you hear	about this emplo	ovment opp	ortunity?		
s		Experience	Do you have at le experience?	ast one year of re	esponsible	payroll or financial and sta	atistical record keeping	
		Education	Do you have a hig	jh school diploma	a or equival	ent?		
		Experience	Do you have HR e	experience?				
		Education	Do you have a Hig	gh School diplom	ia?		V	
	Education Do you have a Master's Degree?							
		Education	Do you have a Ma	aster's Degree?			1	
		Experience	How many years	of Accounting ex	perience do	you have in a higher edu	cation setting?	
		Education	Do you have a Hig	gh School diplom	ia?	Click to submit a c	ustom supplemental	
		Experience	Do you have at le	ast 4 years of ex	perience?	question for review	w and approval.	
	Deplaying all 10							
С	ick ch	neck box to a	dd an			Can't find the one y	ou want? Add a new one	
e	kisting	g supplement	al question.		Click Su finishe	ubmit when d.	Submit Cancel	
							11.	

Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear where points and disqualifying responses can be associated to the posting question.

**Posting Question Options:** Once questions have been added to the posting, you will see a column of checkboxes to the left of each question; checking these boxes will make a question required.

Image: Click to make questions required.       Click to make questions       Answer       Points       Disqualifying         Image: Click to make questions       1.0 years       2.1-3 years       3.4-5 years	osition	Required	Category	Question			Status	
Experience       Do you have at least one year of responsible payroll or financial and statistical record active keeping experience?         Education       Do you have a High Scho       active         Experience       Do you have a High Scho       active         Experience       How many years of Accor       Assign points to answers.       ucation setting?         Click to make questions required.       1.0 years       2.1-3 years       3.4-5 years         3.4-5 years       4.5+ years       1.5+ years       1.5+ years	Jonaon		Uncategorized	How did you hear about this employment opportunity?	?		active	
Education       Do you have a High Scho       active         Experience       How many years of Acco       Assign points to answers.       ucation setting?       active         Click to make questions required.       Answer       Points       Disqualifying         1. 0 years       1. 0 years       Image: Sign points       Image: Sign points         2. 1-3 years       3. 4-5 years       Image: Sign points       Image: Sign points         3. 4-5 years       Image: Sign points       Image: Sign points       Image: Sign points			Experience	Do you have at least one year of responsible payroll o keeping experience?	or financial and s	statistical record	active	8
Experience       How many years of Accor       Assign points to answers.       ucation setting?       active         Click to make questions required.       Answer       Points       Disqualifying         1. 0 years       1. 0 years       1. 1-3 years       1. 1-3 years         3. 4-5 years       4. 5+ years       1. 5+ years			Education	Do you have a High Scho		1	active	×
Click to make questions required.       Possible Answers: Predefined Options         1. 0 years       1. 0 years         2. 1-3 years       1. 3. 4-5 years         3. 4-5 years       1. 5+ years			Experience	How many years of Accor Assign points to a	answers.	ucation setting?	active	6
Click to make questions required.     Answer     Points Disqualifying       1. 0 years     1. 0 years       2. 1-3 years     1. 0 years       3. 4-5 years     1. 0 years       4. 5+ years     1. 0 years	_			Possible Answers: Predefined Options				
1. 0 years         required.         1. 0 years         2. 1-3 years         3. 4-5 years         4. 5+ years		Click to ma	ake questions	Answer	Points	Disqualifying		
required.         2. 1-3 years           3. 4-5 years         1           4. 5+ years         1			and questions	1. 0 years				
3. 4-5 years		requirea.		2. 1-3 years				
4. 5+ years				3. 4-5 years				
				4. 5+ years				

# <u>Create New EHRA Posting from an Existing Posting – Applicant</u> <u>Documents Tab</u>

In the **Applicant Documents** tab, Applicant documents can be included in the application process by selecting **Included** to make the documents optional and **Required and Included** to make the document(s) mandatory to complete the application process. Documents attached by the applicant during the application process will be accessible for viewing during applicant review. Once done, click on the Next>>> button to save changes and proceed to the next tab:

ings / EPA / Assistant Director for HR Editing Posting Posting Details	Click I upload	ncluded to make ding a document	optional.	Click <u>both</u> Included <u>and</u> Required to make uploading a document required.
Position Funding Infor	Included	to make the document(s) ma	Indatory to complete t	he approximation process.
Supplemental Questions	Order	Name	Included?	Required?
Applicant Documents	1	Resume		
References/Letters of				
Search Committee	2	Cover Letter		
Ranking Criteria				
Posting Documents	3	Curriculum Vitae		
Summary	4	Teaching Philosophy		
	5	Letter Of Reference 1		
	6	Letter Of Reference 2		
	7	Letter Of Reference 3		

## <u>Create New EHRA Posting from an Existing Posting – References / Letters</u> of Recommendation Tab

In the **References / Letters of Recommendation** tab, you can indicate whether or not you wish to require applicants to submit references with their application. You can also indicate the minimum and maximum number of references you would like applicants to submit, and the cutoff date by which reference information must be submitted:

stings / EPA / Assistant Director for HR	Systems (Draft) / Edit: References/Letters of Recommendation
Editing Posting	References/Letters of Recommendation Save <pre>Save</pre>
Posting Details	冬 Chack spalling 戸
Position Funding Infor	
Supplemental Questions	Accept References: Please indicate whether or not you wish to require applicants to submit references with their application.
Applicant Documents	Minimum Requests: Please indicate the minimum number of references you would like applicants to submit.
References/Letters of	Maximum Requests: Please indicate the maximum number of references you would like applicants to submit.
Search Committee	Cutoff Date: Please indicate the date by which reference information must be submitted.
Ranking Criteria	* Required Information
Posting Documents	References/Letters of Recommendation
Summary	Accept References No V Indicate Yes or No.
eference	Minimum Requests
	Maximum Requests
niormation may	Cutoff Data
ot be submitted	
fter this date.	Save << Prev Next ?

# <u>Create New EHRA Posting from an Existing Posting – Search Committee</u> <u>Tab</u>

Search Committees are advisory in nature and serve the purpose of recruiting a qualified applicant pool, reviewing their credentials, and recommending acceptable candidates to the hiring manager. Search Committees can consist of University employees both internal and external to the hiring unit, as well as individuals external to the University who represent key stakeholders.

In the **Search Committee** tab, you can assign search committee members who will have access to review application information for a specific posting. Search committee members can view applications, applicant documents, and evaluate / rank applicants based upon ranking criteria you establish as part of the posting. Requests to add search committee members will be reviewed and approved by the Division of human Resources (DHR) once the posting request is routed to DHR for approval. Upon DHR approving a search committee member's access, the search committee member will receive an e-mail notification with instructions on how to access the online posting and related application information:

Editing Posting	Search Committee		Save << Prev Next >				
Posting Details	Search Committees are advisory in nature	and same the purpose of recruiting a qualified applicant pool, review	ing their credentials, and				
Position Funding Infor	recommending acceptable candidates to th	recommending acceptable candidates to the hiring manager. Search Committees can consist of University employees both internal and external					
Supplemental Questions	to the hiring unit, as well as individuals exte	rnal to the University who represent key stakeholders.					
Applicant Documents	Search Committee Members						
References/Letters of	No Search Committee Members have been	assigned to this Posting yet.					
Search Committee	Seereb						
Ranking Criteria	Search						
Posting Documents	Find a User to assign as a Search Committ	ee Member.					
Summary							
	First Name						
	Last Name	To search for a pre-approved search					
	Email Address	committee member, enter the name a	and				
	Cauch	click the Search button.					

After searching for a pre-approved search committee member, click on the **Add Member** button to add them to your search committee. You can also make a search committee member the chair of the search committee by clicking on the check box next to **"Make Member the Committee Chair"**:

	Click the check box to assign the
Search	search committee member as the committee chair.
Find a User to assign a	is a Search Committee Mem <mark>e</mark> r.
Name Email Add	ress Add Member
Lonnie Crotts emailaddre	ess@zed.zed Add Member Imake Member The Committee Chair
First Name Lonnie	
	Click the Add Member button to add
Last Name Crotts	the search committee member you

To create an account for a new search committee member, enter in the committee member's name, current e-mail address, and desired username, then click on the **Submit** button:

New Search Committee Member		
Request that someone be granted access to the system for the purport Required fields are indicated with an asterisk (*).	ose of serving as a Search Committee Member.	
Account Information Please enter the following information to create an account for a   First Name  Last Name  Email  Username	new Search Committee Member.	
Submit	To create an account for a new search committee member, complete the fields and click submit.	<< Prev Next >>

If the requested search committee member is already an assigned user of the PeopleAdmin system, their user account information will be displayed, and you can add them to your search committee by clicking on the **Add User** button:

Ma	atching User					
Username	ambraun					
First Name	Amy					
Last Name	Braun	Click the Add User button to add the new				
Email	emailaddress@zed.zed	soarch committee member in a pending				
Preferred Group Employee		search committee member in a pending				
Add User		status. Access will be reviewed and approved by DHR.				
Clear Matching	Users					
New Search	Committee Member					
Request that son	neone be granted access to th	e system for the purpose of serving as a Search Committee Memb	ber.			
Required fields a	Required fields are indicated with an asterisk (*).					
Account Inform	nation					
Please enter the	e following information to cre	ate an account for a new Search Committee Member.				
* First Nar	ne Amy					
* Last Nan	ne Braun					
* Email	ambraun@ncat.edu					
* Usernan	ne ambraun					
Submit						
			Save << Prev Next >>			
### Create New EHRA Posting from an Existing Posting – Ranking Criteria Tab

**Ranking Criteria** can be used by search committees during the applicant review process to rank applicants based upon job-related experience and education factors. This optional tool can be helpful in identifying the most qualified candidates in an applicant pool. Ranking criteria are not presented to the applicant:

Editing Posting	Ranking Crit	teria		(	Save << Prev Next
<ul> <li>Posting Details</li> <li>Position Funding Infor</li> </ul>	Ranking Criteria experience and e	can be used used by search com education factors. This optional to	mittees during the applicant review process to ol can be helpful in identifying the most qualifie	rank applicants bas ed candidates in an a	ed upon job-related applicant pool. Ranking
Supplemental Questions	Adding New Rar	nking Criteria: Click on the button I	abeled "Add a Criterion". A dialog box will app	ear where you can a	add an existing criterion by
Applicant Documents	Checking the box	Danking Criteria: To submit a new	repling criterion for review and approval, alia	k on the butten label	lad "Add a Critarian" . Mba
References/Letters of	the Available Eva	aluative Criteria box opens, click o	on the "Add a new one" link in the bottom right	hand corner	Add a Chienon . Whe
Search Committee	Included Evalua	ative Criteria			Add a Criteri
Ranking Criteria	Category	Description	Click to add ranki	ng criteria.	Status
Posting Documents	7			,	J
Summary				l	Save << Prev Next

To add ranking criteria, click on the button labeled **"Add a Criterion"**. A dialog box will appear where you can add an existing criterion by checking the box in the "Add" column or submit a new one for approval. To submit a new ranking criterion for review and approval, click on the button labeled **"Add a Criterion,"** then click on the **"Add a new one"** link in the bottom right hand corner of the dialog box that opens:

Add a Ranking Criterion Available Evaluative Criteria		×.
Category: Any V Keyword: Add Category Description		Search for ranking criteria by keyword or category.
Uncategorized Rank Experience - 5 is the hit Possible Answers: 1. 1 2. 2 3. 3 4. 4 5. 5 Applicant workflow state	ghest Indicate the applicant wor that allows an applicant to Juder Review by HR	kflow state b be ranked.
<ul> <li>Uncategorized Please rate the candidates ex</li> <li>Uncategorized Teaching experience in a unit</li> <li>Diplaying all 3</li> <li>Click check how to add an</li> </ul>	versity Click to s criterion	ubmit a custom ranking for review and approval. one you want? Add a new one
existing ranking criterion.	Click Submit when finished.	Submit Cancel

Editing Posting	Ranking Crite	ria	Click Save or N	ext to	move 📕	Save	<	Prev
<ul> <li>Posting Details</li> </ul>	Ranking Criteria ca	in be used used by search com	to the next tab	).	lican	ts based up	on job-	related
Position Funding Infor	experience and edu criteria are not pres	ucation factors. This optional to sented to the applicant.	rean be neipiar in identitying	g the most q	aannea cananaates	in an applic	ant poo	ol. Ranking
Supplemental Questions	Adding New Rankin	ng Criteria: Click on the button la	beled "Add a Criterion". A d	ialog box wi	l appear where you	ı can add ar	n existir	ng criterio
	checking the box in	the "Add" column or submit a n	ew one for approval.					
Applicant Documents	0 1 W 11 D							
<ul> <li>Applicant Documents</li> <li>References/Letters of</li> </ul>	Submitting New Ra the Available Evalu	anking Criteria: To submit a new ative Criteria box opens, click o	ranking criterion for review a the "Add a new one" link in	and approva the bottom	I, click on the button right hand corner.	n labeled "A	dd a Ci	riterion". V
<ul> <li>Applicant Documents</li> <li>References/Letters of</li> <li>Search Committee</li> </ul>	Submitting New Ra the Available Evalu	inking Criteria: To submit a new lative Criteria box opens, click o <b>ve Criteria</b>	ranking criterion for review a the "Add a new one" link in	and approva the bottom	I, click on the buttor right hand corner.	n labeled <sup>«</sup> A	dd a Ci	riterion". V Add a Cr
<ul> <li>Applicant Documents</li> <li>References/Letters of</li> <li>Search Committee</li> <li>Ranking Criteria</li> </ul>	Submitting New Ra the Available Evalu Included Evaluation Category	anking Criteria: To submit a new lative Criteria box opens, click o ve Criteria Description	ranking criterion for review a the "Add a new one" link in	and approva the bottom Weight	l, click on the buttor right hand corner. Workflow State	n labeled "A Status	dd a Ci	riterion". V Add a Cr
Applicant Documents     References/Letters of     Search Committee     Ranking Criteria     Posting Documents	Submitting New Ra the Available Evalu Included Evaluation Category Uncategorized	Inking Criteria: To submit a new lative Criteria box opens, click o ve Criteria Description Teaching experience in a univ	ranking criterion for review a the "Add a new one" link in ersity	and approva the bottom Weight	I, click on the buttor right hand corner. Workflow State Under Review by HR	n labeled <sup>«</sup> A Status active	dd a Ci	riterion". V Add a Cr
<ul> <li>Applicant Documents</li> <li>References/Letters of</li> <li>Search Committee</li> <li>Ranking Criteria</li> <li>Posting Documents</li> </ul>	Submitting New Ra the Available Evaluation Category Uncategorized Uncategorized	Inking Criteria: To submit a new lative Criteria box opens, click o ve Criteria Description Teaching experience in a univ Please rate the candidates ex	ranking criterion for review a the "Add a new one" link in ersity berience related to the job:	and approva the bottom Weight	I, click on the buttor right hand corner. Workflow State Under Review by HR Under Review by HR	n labeled "A Status active active	dd a Ci	riterion". V Add a Cr

### <u>Create New EHRA Posting from an Existing Posting – Posting</u> <u>Documents Tab</u>

The **Posting Documents Tab** allows you to upload documents as attachments that will route with the posting request through the approval workflow. Attachments can be uploaded as follows:

- **Upload New:** Choose this option if you want to upload a file from your computer.
- **Create New:** Choose this option if you want to create a new file to attach using the PeopleAdmin editor.
- **Choose Existing:** Choose this option if you want to attach a file that has already been uploaded into PeopleAdmin as part of another action.

Excel and Word documents may be attached. PDF conversion must be completed for the document to be valid when applicable:

	Home Postings Hiring Proposals   My Profile Help	
	Linc Butler, you have 0 messages. Supervisor	logou
Postings / EPA / Assistant Director for HR	Systems (Draft) / Edit: Posting Documents	
Editing Posting	Posting Documents Save <- Prev Next >	>
Posting Details	To add a document to the posting, hover over the blue Action text link to the right of the document name.	_
Position Funding Infor	Documents can be uploaded by browsing for the document or a document can be written or previously selected. Document types that are	
Supplemental Questions	supported as attachment include .doc, .docx, .pdf, .rtf, .i	
Applicant Documents	PDF conversion must be completed for the document to	
References/Letters of	Document Type Name Status (Actions)	
Search Committee	Marketing Plan Actions	
Ranking Criteria	Print Ad Text Upload New	
Posting Documents	Choose Existing Complete this page by clicking Save <pre>Save <pre>Save</pre></pre>	>
Summary	on Save and Next>	_

### Create New EHRA Posting from an Existing Posting – Summary Tab

The **Summary Tab** allows you to perform a final review all of the posting information you've entered on the previous tabs prior to sending the request to the next step in the approval workflow. Please review the details of the posting summary carefully before continuing.

The **Blue Circle Check** appears by those tabs for which all required information has been entered:

Posting	s / EPA / Assistant Director for HR Systems (E	Draft) / Summary		
	Posting: Assistant Director Edit Current Status: Draft Position Type: EPA Section/Unit VC for Human Resources	r for HR Systems (EPA) Created by: Linc Butter Owner: Linc Butter		Take Action On Posting •            See how Posting looks to Applicant             Print Preview (Applicant View)             Print Preview
	Summary County County			
	Please review the details of the pos	sting carefully before continuing.		
		ang carolary soloro continuing.		
	To take the action, select the appro you are ready to submit your postin	priate <b>Workflow Action</b> by hovering over the orange "Take Action on thi	s Posting" button. You may add a Comment to the posting and also add this posting to your Watel	h List. in the popup box that appears. When
	To edit the posting, click on the Edi	it link next to the Section Name in the Summary Section. This will take	you directly to the Posting Page to Edit. If a section has an orange icon with an exclamation point	, you will need to review this section and
	make necessary corrections before	moving to the next step in the workflow.		
	Posting Details Edit			
		Click "Edit" to make e	edits to a tab.	
	Classification Information			
	HELP TEXT: If the details below	w are incorrect, plet	de menu while modifying the Position.	
Ь	ua Circla Chack	Assistant Director		
	ue circle check	82229		
	Classification Type	EPA		
	Salary Range	\$55,000 - \$60,000		
	Minimum Experience/Education			

An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save"**, and then return to the **Summary Tab** by clicking on the link in the left column:

Position Funding Informat	tion <u>Edit</u>	Click "Edit" to make edits to a tab.	
Budget Advisory Approval Orange Circle Exclamation Point	EPA and SPA positi deration of the Comr	ons that are funded in whole or in part by general state fur nittee's review process, state below what mission specific	ds requires approval by A&T's Budget Advisory , essential, and / or key objectives will not be met if the
Mission Specific, Essentia and/or Key Objectives not M without position	et Test		

Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example, the appropriate routing action is **"Send to Department Head (Move to Department Head)"**:

NORTH CAROLINA A&I STATE UNIVERSITY			(inbox) Pe Watch List A	e <b>ople</b> Admin PPLICANT TRACKING <b>V</b>
	Home Postings H	liring Proposals   My Profile	Help	
			Linc Butler, you have 0 messages. Supervisor	logout
Postings / EPA / Assistant Director for HR Systems (Draft) / Sumary         Posting: Assistant Director for H         Edit         Current Status: Draft         Position Type: EPA         Section/Unit: VC for Human         Resources         Summary       History         Settings       Hiring	Click on "Take A Request", then i selection to mov the next step in workflow.	action On Pending make appropriate ve the request to the approval	Take Action On Posting • WORKFLOW ACTIONS Keep working on this Posting Canceled (move to Canceled) Send to Department Head (move Department Head)	to
Please review the details of the posting care To take the action, select the appropriate W and also add this posting to your Watch Lis box.	fully before continuing. orkflow Action by hovering ov t. in the popup box that appear:	er the orange "Take Action on t s. When you are ready to submi	nis Posting" button. You may add a Comment to th t your posting, click on the <b>Submit</b> button on the p	ie posting iopup

You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send the action to the next level in the approval workflow, click the **"Submit"** button:



If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation:

"Fund" is required and All required fields must be set before transitioning.		8
North Carolina Age State University	Watch List	APPLICANT TRACKING
Red bar indicating the required fields that need to be completed before submitting the request to the part step in the workflow	Linc Butler, you have 0 messages. Supervisor	C logout
request to the next step in the worknow.	Take Action On Posting 🔻	

Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

Posting was successfully transitioned							8
North Carolina A&T State University					Watch List	APPLICANT TRACKING	3 7
	Home Postings H	iring Proposals	My Profile	Help			
Green confirmation bar indic	ating the Donding	,		Linc Butler, you have 0 messa	es. Superviso	or C	logout
		5					
Request was successfully tran	nsitioned and						
added to your Watch List.							
Current Status: Department Head				📩 See how	Posting looks to	Applicant	

The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

#### <u>Create New EHRA Posting from an Existing Posting - Saving to Return to a</u> Pending Request Later

On the **Summary Tab** is an important menu item which should be selected if you need to stop a work session on the posting before submitting it to the next level for approval. Following this step will ensure that all your work is saved when you open the request for completion.

- 1) Click the "Save" button located in either the top or bottom right corner
- 2) Select "Summary" from the Tab List (illustrated above)
- 3) Select "Keep Working on this Posting"

North Carolina A&T State University						(Inbox) Watch List	PeopleAdmin APPLICANT TRACKING V
		Home	Postings	Hiring Proposals	My Profile	Help	
						Linc Butler, you have 0 messages. Supervisor	logout
Postings / EPA / Assistant Direct Posting: Assist Edit Current Status: Draft Position Type: EPA Section/Unit: VC for H Resources Summary Histor	tor for HR Systems (Draft) / stant Director for I uman Createc Owner: y Settings Hirin	Summary HR Systems J by: Linc Butler Linc Butler g Proposals	(EPA)	sition Description		Take Action On Posting  WORKFLOW ACTIONS Keep working on this Posting Canceled (move to Canceled Send to Department Head)	) i) nove to

- 4) Add any Comments into the window that opens (below) as notes to yourself, if desired.
- 5) Click "Submit"



The **Posting** can be located when you log into the Applicant Tracking module again as the same **User Type** you used to begin the action. Hover your cursor over the **Postings tab** and click on "**EHRA**" You will then return to the **EHRA Postings view**, which provides a list of all postings based on your active user type, from which you can search for and select this posting and continue.

#### **Create New EHRA Posting from a Position Description**

Select **Create from Position Description** if you wish to create a posting using information from a position description that has previously been approved in the PeopleAdmin system.

**<u>PLEASE NOTE</u>**: If the position classification and/or the position description details have changed, you must start a Modify Position action in the Position Management module prior to posting the position.

Choosing the **Create from Position Description** option copies information from an existing position description into a new posting:

Create New	×
What would you like to use to create this new posting?	
Create from Posting	
Uses an existing posting as a template and automatically copies in m information.	ost
Create from Position Description	
Copies in most of the information from a position description.	

After clicking on **Create from Position Description**, you will be taken to the **EHRA Position Descriptions** view, where you can search position descriptions by any number of criteria, including but not limited to position title, posting number, position number, department name, or supervisor name. Searches are fully customizable by position attributes, and you can save custom searches for use again later. If you need assistance in finding the desired position description, please contact the <u>Classification and</u> Compensation Analyst in the Division of Human Resources:

estings / EPA / Create from Pe	ostion Description criptions		Home Postings	Hiring Proposals   My Profile	Active use Supervisor	r type is	Supervisor	
Open Saved Search ▼ Ad	Search: Add Column VC for Human Resou	rces	Search Hide search options	Searche position saved f	es are custo n attributes or later use.	mizable by and can be		
List of curre	nt / pending	; EHRA					Action	ns drop
List of curre position des cype arch	ent / pending scriptions by EPA Position Descriptions"	tors (7 Items Found)	]				Actior down	ns drop menu.
List of curre position des Cyperach end Search: "El Working Position Title	ent / pending scriptions by EPA Position Descriptions" PA Position Number Position Number	c EHRA active user	Employee Last Name	Position/Classification Title	Department	Supervisor	Action down	ns drop menu.
List of curre position des Core arch of Search: "El Working Position Title Act VC-Human Resources Monte Maxawar	ent / pending scriptions by EPA Position Descriptions" PA Position Number 000127 000000	C EHRA active user ptions () (7 Items Found) Employee First Name Linc Statew	Employee Last Name Buffer Hann	Position/Classification Title Asst VC-Human Resources Burden bencer	Department VC for Human Resources	Supervisor VC for Human Resources (Linda McAbee)	Action down	Actions Actions
List of curre position des Constant end Search "El Working Position Title Asst VC-Human Resources Budget Minager Bergere Genetication	EPA Position Descriptions EPA Position Descriptions" Position Number 000127 000000 000000	C EHRA active user	Employee Last Name Butler Hines Enter	PositioniClassification Title Assi VC-Human Resources Budget Manager Bromom Constraints	Department VC for Human Resources Research Administration Administration	Supervisor VC for Human Resources (Linda McAbee) Assoc Dean for Research (Sinkir Hymon-Parker) Accord Dean for Research (Sinkir Hymon-Parker)	Action down	(Actions v Actions v Actions v

Once you locate the position description you wish to create from, you can select it by moving your cursor over that position description's corresponding  $\boxed{\text{Actions } \mathbf{v}}$  drop down menu located in the far right columns and clicking on **Create From**. This drop down menu will also give you the option of **View** if you wish to

view the information associated with a particular position description prior to selecting Create From:



By clicking **Create From**, the **New Posting** form will appear. This is where you can update the working title of the position for the purpose of posting, and view **Organizational Unit** information to confirm accuracy. You can also provide **Special Offline Application Instructions** in the field provided if necessary. Once all information is entered and confirmed on the **New Posting** page, click on the orange

**Create New Posting** button to begin updating posting information:

	Home Postings Hiring Proposals   My Profile	Help	
		L	inc Butler, you have 0 messages. Supervisor 💽 C logout
Postings / EPA / New Posting			
New Posting  * Required Information		Create new posting button.	Greate New Posting Cancel
Position Title	Assistant Director for HR Systems		
Organizational Unit Division/School/College *	VC for Human Resources	Confirm	n Organizational Unit ation.
Department	VC for Human Resources		
Section/Unit *	VC for Human Resources		
Online Applications	Includ	de special	
Special offline application instructions	offlin instru neces	e application ictions if isary.	Create new posting button.
			Create New Posting Cancel

After clicking on the "**Create New Posting**" button, you will then be taken to the **Posting Details tab**, the first information tab that must be completed before the new **EHRA Posting** can be sent to the next step in the approval workflow. Each information tab is listed on the **Edit Posting** page in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while **EditStiviti** appear as blue links.

You can save the changes you've made to the active tab you're working on and navigate to the next tab in the list simultaneously by clicking the Next>>> button located in both the top and bottom right corners of the page. You can save the active tab you're working on and stay on the same tab by clicking the "Save" button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column; however, this action WILL NOT save any changes made to the tab you are navigating away from.

Required fields are highlighted in <u>red</u> and must be filled in before the new **EHRA Posting** can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check Circle** also appears next to tabs that do not contain any required fields:

Tab list	Home Postings Hiring Proposals   My Profile Help	
	Linc Butler, you	have 0 messages. Supervisor 💌 C logout
Postings / PA / Assistant Director for HR S	vstems (Draft) / Edit: Posting Details	
Editing Posting	Posting Details Save and Nex	t buttons.
Posting Details		
Position Funding Infor	▼ <u>Circck spenning</u> ▼ To make a Basical feet area late the information on this ensure that a list the Next butter of the second sec	and a state of the late to the state of the
Supplemental Questions	Proceed through all sections completing all necessary information. To submit the Posting to the	e next approval step, you must go to the <b>Posting</b>
Applicant Documents	Summary Page by clicking on the Next button until you reach the Posting Summary Page or s navigation menu. Once a summary page appears, hover your mouse over the orange Action but	elect Posting Summary Page from the left utton for a list of possible approval step options.
References/Letters of	* Required Information	
Search Committee	Classification Information	
Ranking Criteria	HELP TEXT: If the details below are incorrect, please make the appropriate Classification	n selection using the "Classification' Tab on the
Posting Documents	left side menu while modifying the Position.	
Summary	Position/Classification Assistant Director Title	
	Job Code 82229	
Blue Check Circle	Classification Type EPA	Deguined Field
	* Salary Range This field is required.	Required Field
	Enter salary to be advertised amount or a description such as "commensu	rate with education and experience"

# <u>Create New EHRA Posting from a Position Description – Posting Details</u> <u>Tab</u>

Since you are creating a new **EHRA Posting** from an approved position description, many of the fields will already be filled in with information copied from the position description. Follow the instructions at the top of the page to complete any remaining required fields, the button to save changes and navigate to the next tab:

Postings / EPA / Assistant Director for HR	Systems (Draft) / Edit: Posting Details	
Editing Posting	Posting Details Save and Next buttons.	ext >>
Posting Details		
Position Funding Infor		
Supplemental Questions	To create a Posting, first complete the information on this screen, then click the Next button or select the page in the left hand navigation m Proceed through all sections completing all necessary information. To submit the Posting to the next approval step, you must go to the Pos	ienu. sting
Applicant Documents	Summary Page by clicking on the Next button until you reach the Posting Summary Page or select Posting Summary Page from the left navigation menu. Once a summary page appears, hover your mouse over the orange Action button for a list of possible approval step option.	ons
References/Letters of	Required Information	
Search Committee	Classification Information	
Ranking Criteria	HELP TEXT: If the details below are incorrect please make the appropriate Classification selection using the "Classification' Table	on the
Posting Documents	left side menu while modifying the Position.	
Summary	Position/Classification Assistant Director Fields from the approved position descrip	ption
	will be copied in to your new posting.	
	Salary Range     Enter salary to be advertised amount or a description such as "commensurate with educati     if desired.	ange
	Minimum Experience/Education	

Р	osition Overview		
	Primary Purpose of	Test	<b></b>
	Position		Position Overview and Position Information:
	Primary Function of Organizational Unit	Test	Continue to enter posting information into any empty fields as needed.
P	osition Information		
*	Position Title	Assistant Director for HR Systems	
*	Working Title	· · · · · · · · · · · · · · · · · · ·	This field is required.
	Position Number	TLB30	
*	JCAT	12345	
	Approved Salary	\$60,000	
*	FLSA	Exempt	
*	Appointment Type	Permanent - Full-time	
*	Tenure Track	Please select This field is required.	
	FTE		
*	If Time Limited, Appointment Length	If time limited, please indicate budget end date. If t left blank if the "Time Limited" field above is check	funded from more than one fund, indicate earliest end date. This field cannot be ed selected."

You can indicate other users you would like to have **Supervisor** and / or **Applicant Reviewer** access to the posting by searching for their name in the Supervisor and Applicant Reviewer fields. Indicate the proposed **Open Date** and **Date Desired for Closing or Initial Review (minimum 30 days)**, which will define the number of days applicants can view and apply for the posting. The minimum allowable posting period for EHRA positions is thirty (30) calendar days, however, an EHRA posting can be posted as open until filled. Select the appropriate **Fast Find** category for the posting to ensure it is included in the correct pre-defined search when an applicant clicks on the corresponding Fast Find button through the applicant portal. Choices are Administrators and Research, Faculty, Post Doctoral, Temporary Staff, and Staff:

Po	sting Detail Information		Supervisor
*	Supervisor	Select Some Options This field is required	Applicant Reviewer
*	Applicant Reviewer	Select Some Options This field is required	access to the posting.
	Posting Number		
*	Open Date	This field is required.	
	Date desired for closing or initial review ( minimum 30 days).	Minimum allowa period is thirty (3 days. Posting ca	ble posting 0) calendar 1 also be open
	Close Date	until filled.	·
	Open Until Filled	No	
*	Special Instructions to Applicant		
		Select the most	appropriate Fast

Include details regarding any special advertising requests, such as posting the position on additional job posting websites or in specific print media outlets, in the **Advertising Summary** field. A link to the job posting on the North Carolina A&T State University applicant portal will be included in any special advertising. The **Pass Message** and **Fail Message** fields contain template notifications that will be sent to applicants who are screened out of the posting through **Supplemental Questions**. Once all fields on the Posting Details Tab are complete, click the Next>>> button to save your changes and move to the next tab. You can also click the "Save" button if you wish to save your changes and keep working on the current tab.

Advertising Summary	Include any special advertising request information.
	Please list additional external advertising sources if different than standard advertising sources. Standard sources include: NC Employment Security Commission & UNC General Administration
* Pass Message	Thank you for your interest in this position. The screening and selection process is currently underway and will continue until a successful candidate is chosen. Should review of your qualifications result in a decision to pursue your candidacy, you will be contacted.
* Fail Message	Thank you for your interest in this position. Based on your responses to the questions on the employment application, you do not meet the minimum qualifications for this position. Please do not let this discourage you from applying for other positions that interest you.
	Save and Next buttons.

### <u>Create New EHRA Posting from a Position Description – Position Funding</u> <u>Information Tab</u>

In the Budget Advisory Approval section of this tab, state what mission specific, essential, and / or key objectives will not be met if the position is not filled. All recruitment of permanent EHRA and SHRA positions that are funded in whole or in part by **general state funds** requires approval by the University's Budget Advisory Committee:

stings / EPA / Assistant Director for HR S	iystems (Draft) / Edit: Position Fundin	g Information			
Editing Posting	Position Funding Info	ormation	Save <> Prev	Next >>	
Posting Details	ARC Charles and User .				
Position Funding Infor	✓ <u>Check spelling</u> ▼				
Supplemental Questions	* Required information				
Applicant Documents	Budget Advisory Approval			_	
References/Letters of	All recruitment of permaner A&T's Budget Advisory Co	nt EPA and SPA positions that are funded in whole or in part by gener mmittee. To receive consideration of the Committee's review process.	Charles with a target	•	
Search Committee	essential, and / or key obje	ctives will not be met if the position is not filled.	State what miss	ion	
Ranking Criteria		Test	specific, essenti	al,	
Posting Documents	Mission Specific, Essential and/or Key		and/or key obje	ctives	
Summary	Objectives not Met without position		will not be met	if	
		-	position is not fi	illed.	
	Funding Source Details				
	Indicate the funding source Select "SAVE" after each e	r(s) for this position. Click on "Add Funding Source Details Entry" to entintry. Please note that the annual amount budgeted must equal the requ	er budget and other require lested salary.	d codes.	

Funding Source information from prior posting will copy over into the fields in the Funding Source Details section of this tab, and you can make edits as necessary. **PLEASE NOTE:** The annual amount budgeted must support the hiring range indicated on the Posting Details Tab.

If you are unsure of what fund to use, the most up to date information may be found in **Banner Finance** on these forms:

- 1) FTVORGN- Provides a list of Org Codes
- 2) FTVFUND- Provides a list of Funds
- 3) FTVACCT- Provides a list of Accounts

These forms show listings of all active funds. For additional help, refer to the Banner Training Guide.

If the position has more than one funding source, click on the **Add Funding Source Details Entry** button and **"Save"** until all sources have been entered. **PLEASE NOTE:** Each time you add an additional entry, you will need to **scroll down below the last saved entry** to enter a new funding source. Once all funding sources have been added, click Next>>> to move to the next tab:

Funding Source Details			
Indicate the funding source must equal the requested s	(s) for this position. Click on "Add Funding Source alary.	Details Entry" to enter budget and other required codes. Select "SAVE" after each er	ntry. Please note that the annual amount budgeted
If the position has more that below the last saved entry	an one funding source, continue to select "Add Fur to enter a new funding source.	nding Source Details Entry" and "Save" until all sources are entered. Each time you a	dd an additional entry, you will need to scroll down
State Appropriated * Funding / Non-State Appropriated Funding	State Appropriated Funding	Funding information	
If non-state, select source of funding	Please select	will be copied in from	
If other, designate source		the approved position	
* Budget Code	16070 (State)	description, which you	
• Fund	111111 Format: 6 digit number #######	can edit as necessary.	
• Org	11111 Format: 5 digit number ######		
* Account	11111 Format: 5 digit number ######		<b>IMPORANT NOTE:</b>
* Program	111 Format: 3 digit number ###		Remember to click
Date Funds End			Save alter each
<ul> <li>Annual Amount</li> </ul>	\$45,000	Click here to add a funding source. If	entered.
* Percentage of FTE	1.0	the position has more than one funding	
Remove Entry?		source. continue to click here until all	
Add Funding Source Details Er	try .	funding sources are entered.	Save << Prev Next >>

### <u>Create New EHRA Posting from a Position Description – Supplemental</u> <u>Questions Tab</u>

In the **Supplemental Questions** tab, you can identify screening questions related to an applicant's education and experience that must be answered as part of the application process. To add supplemental questions to your posting, click on the button labeled **"Add a Question"**. A pop up section will appear where you can add an existing question or submit a new one. Onc Next>>>, click on the button to save changes and proceed to the next tab:

Editing Posting	Supplemental Questions		Save << Prev Next >			
Posting Details	Adding New Posting Questions: Click on the button labe	led "Add a Question". A pop up section will appear where you	u can add an existing			
Position Funding Infor	question or submit a new one.					
Supplemental Questions	Adding Existing Posting Questions: There are two ways to search for approved posting questions to add to the job being posted. You can filter					
Applicant Documents	Submitting New Posting Questions: To submit a new gu	Submitting New Desting Ouestions: To submit a new substan for raviou and entraval aliak on the butten labeled "Add a Ouestion". When the				
References/Letters of	Available Supplemental Questions box opens, click on the "Add a New One" link in the bottom right hand corner.					
Search Committee	Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear where points and					
Ranking Criteria	disqualifying responses can be associated to the posting	g question.				
Posting Documents	Posting Question Options: Once questions have been ad checking these boxes will make a guestion required.	dded to the posting, you will see a column of checkboxes to t	he left of each question;			
Summary	Included Supplemental Questions	Click to add supplemental	Add a questi			
	Position Required Category	Question QUESTIONS.	Statu			

Adding Existing Posting Questions: There are two ways to search for approved posting questions to add to the job being posted. You can filter using the key word search or filter by question category. To add an existing question, click the check box next to the question you wish to add.

**Submitting New Posting Questions:** To submit a new question for review and approval, click on the button labeled "Add a Question". When the **Available Supplemental Questions** box opens, click on the **"Add a New One"** link in the bottom right hand corner.

	Add a	Question					×	
L	Available Supplemental Questions							
Category: Any Keyword:				Filter supplemental ques by keyword or category.	stions			
L	Auu	Uncategorized	How did you hear	about this emplo	ovment opp	ortunity?		
s		Experience	Do you have at least one year of responsible payroll or financial and statistical record keeping experience?					
		Education	Do you have a hig	jh school diploma	a or equival	ent?		
		Experience	Do you have HR e	experience?				
		Education	Do you have a Hig	gh School diplom	ia?		V	
		Education	Do you have a Ma	aster's Degree?				
		Education	Do you have a Ma	aster's Degree?				
		Experience	How many years	of Accounting ex	perience do	you have in a higher edu	cation setting?	
		Education	Do you have a Hig	gh School diplom	ia?	Click to submit a c	ustom supplemental	
		Experience	Do you have at le	ast 4 years of ex	perience?	question for review	w and approval.	
	Dipl	aying <b>all 10</b>		_		0.115.14		
C	ick ch	neck box to a	dd an			Can't find the one y	ou want? Add a new one	
e	kisting	g supplement	al question.		Click Su finishe	ubmit when d.	Submit Cancel	
							14	

Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear where points and disqualifying responses can be associated to the posting question.

**Posting Question Options:** Once questions have been added to the posting, you will see a column of checkboxes to the left of each question; checking these boxes will make a question required.

Included \$	Supplementa	l Questions		Add a q	uestion
Position	Required	Category	Question	Status	
1		Uncategorized	How did you hear about this employment opportunity?	active	
2		Experience	Do you have at least one year of responsible payroll or financial and statistical record keeping experience?	active	×
3		Education	Do you have a High Scho	active	×
		Experience	How many years of Accol Assign points to answers. ucation setting? Possible Answers: Predefined Options	active	Ø
Ľ	Click to ma required.	ke questions	Answer     Points     Disqualifying       1. 0 years     Image: Constraint of the second s		
Reorde	r question	5.	Click to assign disqualifying answers.		vext >>

## <u>Create New EHRA Posting from a Position Description – Applicant</u> <u>Documents Tab</u>

In the **Applicant Documents** tab, Applicant documents can be included in the application process by selecting **Included** to make the documents optional and **Required and Included** to make the document(s) mandatory to complete the application process. Documents attached by the applicant during the application process will be accessible for viewing during applicant review. Once done, click on the Next>> button to save changes and proceed to the next tab:

ings / EPA / Assistant Director for HR Editing Posting Posting Details	Click I uploa	ncluded to make ding a document	optional.	Click <u>both</u> Included <u>and</u> Required to make uploading a document required.
Position Funding Infor	Order	Namo	Included2	Poquired?
Supplemental Questions	Order	Indille	Included?	Kequileu ?
Applicant Documents	1	Resume		
References/Letters of				
Search Committee	2	Cover Letter		
Ranking Criteria				
Posting Documents	3	Curriculum Vitae		
Summary	4	Teaching Philosophy		
	5	Letter Of Reference 1		
	6	Letter Of Reference 2		
	7	Letter Of Reference 3		

### <u>Create New EHRA Posting from a Position Description – References /</u> <u>Letters of Recommendation Tab</u>

In the **References / Letters of Recommendation** tab, you can indicate whether or not you wish to require applicants to submit references with their application. You can also indicate the minimum and maximum number of references you would like applicants to submit, and the cutoff date by which reference information must be submitted:

stings / EPA / Assistant Director for HR	Systems (Draft) / Edit: References/Letters of Recommendation					
Editing Posting	References/Letters of Recommendation Save <pre>Save</pre>					
Posting Details	- <sup>™</sup> Check spelling ▼					
Position Funding Infor	Accent Deferences: Please indicate whether or net you wish to require applicante to submit references with their application					
Supplemental Questions	Accept references: Please indicate whether of not you wish to require applicants to submit references with their application.					
Applicant Documents	Minimum Requests: Please indicate the minimum number of references you would like applicants to submit.					
References/Letters of	Maximum Requests: Please indicate the maximum number of references you would like applicants to submit.					
Search Committee	Cutoff Date: Please indicate the date by which reference information must be submitted.					
Ranking Criteria	* Required Information					
Posting Documents	References/Letters of Recommendation					
Summary	Accept References No V Indicate Yes or No.					
Reference	Minimum Requests					
	Maximum Requests					
mormation may						
not be submitted						
after this date.	Save << Prev Next >					

## Create New EHRA Posting from a Position Description – Search Committee Tab

Search Committees are advisory in nature and serve the purpose of recruiting a qualified applicant pool, reviewing their credentials, and recommending acceptable candidates to the hiring manager. Search Committees can consist of University employees both internal and external to the hiring unit, as well as individuals external to the University who represent key stakeholders.

In the **Search Committee** tab, you can assign search committee members who will have access to review application information for a specific posting. Search committee members can view applications, applicant documents, and evaluate / rank applicants based upon ranking criteria you establish as part of the posting. Requests to add search committee members will be reviewed and approved by the Division of human Resources (DHR) once the posting request is routed to DHR for approval. Upon DHR approving a search committee member's access, the search committee member will receive an e-mail notification with instructions on how to access the online posting and related application information:

Editing Posting	Search Committee	Save << Prev N				
Posting Details	Search Committees are advisory in nature	and serve the purpose of recruiting a qualified applicant pool, reviewing their credentials, and e biring manager. Search Committees can consist of University employees both internal and ex-				
Supplemental Questions	to the hiring unit, as well as individuals external to the University who represent key stakeholders.					
Applicant Documents	Search Committee Members					
References/Letters of	No Search Committee Members have beer	No Search Committee Members have been assigned to this Posting yet.				
Search Committee	0h					
Ranking Criteria	Search					
Posting Documents	Find a User to assign as a Search Committ	ee Member.				
Summary						
	First Name					
	Last Name	To search for a pre-approved search				
	Email Address	committee member, enter the name and				
		click the Search button				

After searching for a pre-approved search committee member, click on the **Add Member** button to add them to your search committee. You can also make a search committee member the chair of the search committee by clicking on the check box next to **"Make Member the Committee Chair"**:

Search Committee Memb	oers	
No Search Committee Members	have been a	Click the check how to assign the
Search		search committee member as the committee chair.
Find a User to assign as a Sear	ch Committee	e Memer.
Name Email Address	Add Memb	er 🔶
Lonnie Crotts emailaddress@zed.z	ed Add Mem	ber 🔲 Make Member The Committee Chair
	_ 1	
First Name Lonnie		
Last Name Crotts	Click th	e Add Member button to add
Email Address	the sea searche	rch committee member you ed for.
Search		

To create an account for a new search committee member, enter in the committee member's name, current e-mail address, and desired username, then click on the **Submit** button:

New Search Committee Member		
Request that someone be granted access to the system for the purport Required fields are indicated with an asterisk (*).	ose of serving as a Search Committee Member.	
Account Information Please enter the following information to create an account for a First Name Last Name Email	new Search Committee Member.	
* Username Submit	To create an account for a new search committee member, complete the fields and click submit.	<< Prev Next >>

If the requested search committee member is already an assigned user of the PeopleAdmin system, their user account information will be displayed, and you can add them to your search committee by clicking on the **Add User** button:

N	Natching User		
Username	ambraun		
First Name	e Amy		
Last Name	Braun	Click the Add User button to add the new	
Email	emailaddress@zed.zed	click the Add Oser button to add the new	
Preferred Gro	oup Employee	search committee member in a pending	
Add User		status. Access will be reviewed and approved by DHR.	
Clear Matching	g Users		I
New Search	Committee Member		
Request that so	meone be granted access to t	ne system for the purpose of serving as a Search Committee Mem	ber.
Required fields	are indicated with an asterisk (	*).	
Account Infor	mation		
Please enter th	ne following information to cre	eate an account for a new Search Committee Member.	
* First Na	ame Amy		
* Last Na	me Braun		
* Emai	ambraun@ncat.edu		
* Userna	me ambraun		
Submit			
Submit			
			Save << Prev Next >>

# <u>Create New EHRA Posting from a Position Description – Ranking</u> <u>Criteria Tab</u>

**Ranking Criteria** can be used by search committees during the applicant review process to rank applicants based upon job-related experience and education factors. This optional tool can be helpful in identifying the most qualified candidates in an applicant pool. Ranking criteria are not presented to the applicant:

Editing Posting	Ranking Crit	teria		Save << Prev Next >		
<ul> <li>Posting Details</li> <li>Position Funding Infor</li> </ul>	Ranking Criteria experience and e	can be used used by search com education factors. This optional to recented to the applicant	mittees during the applicant review process to rank ol can be helpful in identifying the most qualified car	applicants based upon job-related ndidates in an applicant pool. Ranking		
Supplemental Questions	Adding New Ran	criteria are not presented to the applicant. Adding New Ranking Criteria: Click on the button labeled "Add a Criterion". A dialog box will appear where you can add an existing criterion by				
Applicant Documents	checking the box	k in the "Add" column or submit a i	new one for approval.			
References/Letters of	the Available Eva	aluative Criteria box opens, click o	on the "Add a new one" link in the bottom right band	corpor		
Search Committee	Included Evalua	ative Criteria		Add a Criter		
Ranking Criteria	Category	Description	Click to add ranking o	Status		
Posting Documents	1					
Summary				Save << Prev Next		

To add ranking criteria, click on the button labeled **"Add a Criterion"**. A dialog box will appear where you can add an existing criterion by checking the box in the "Add" column or submit a new one for approval. To submit a new ranking criterion for review and approval, click on the button labeled **"Add a Criterion,"** then click on the **"Add a new one"** link in the bottom right hand corner of the dialog box that opens:

Available Evaluat	tive Criteria			Search for rankin	ng criteria by
Uncategorized R	Rank Experience - 5 is the hi Possible Answers: 1. 1 2. 2 3. 3 4. 4 5. 5 Applicant workflow state	ighest Indicate the app that allows an a Under Review by HR	plicant wor pplicant to	kflow state be ranked.	ar Is Ol to
Uncategorized P Uncategorized T Uncategorized T Uncategorized T Uncategorized T Uncategorized T	Please rate the candidates e Teaching experience in a uni	xperience related to th iversity Ca	Click to so criterion an't find the o	ubmit a custom ran for review and app one you want? Add a ne	nking proval. ew one
existing ranking crite	erion.	Click Submit w finished.	vhen	Submit Ca	incel

Editing Posting	Ranking Crite	ria	Click Save or N	lext to	move	Save	<	Prev
Posting Details	Ranking Criteria ca	an be used used by search com	to the next tak	).	lican	ts based up	on job-	related
Position Funding Infor	experience and edu criteria are not pres	ucation factors. This optional toe sented to the applicant.	геан ве неграгни аспалуна	g the most c	aannea eanaidates	in an applic	ant poo	ol. Ranking
Supplemental Questions	Adding New Ranking	ng Criteria: Click on the button la	beled "Add a Criterion". A d	lialog box w	II appear where you	ı can add ar	n existir	ng criterior
	checking the box in the "Add" column or submit a new one for approval.							
Applicant Documents			ew one for approval.					
<ul> <li>Applicant Documents</li> <li>References/Letters of</li> </ul>	Submitting New Ra	anking Criteria: To submit a new lative Criteria box opens, click or	ranking criterion for review a n the "Add a new one" link ir	and approvant the bottom	I, click on the buttor right hand corner.	n labeled "A	dd a Ci	riterion". W
<ul> <li>Applicant Documents</li> <li>References/Letters of</li> <li>Search Committee</li> </ul>	Submitting New Ra the Available Evalu	anking Criteria: To submit a new lative Criteria box opens, click or ve Criteria	ranking criterion for review to the "Add a new one" link ir	and approvant the bottom	I, click on the buttor right hand corner.	n labeled "A	dd a Ci	riterion". W
<ul> <li>Applicant Documents</li> <li>References/Letters of</li> <li>Search Committee</li> <li>Ranking Criteria</li> </ul>	Submitting New Ra the Available Evalu Included Evaluation Category	anking Criteria: To submit a new lative Criteria box opens, click or ve Criteria Description	ew one for approval. ranking criterion for review : a the "Add a new one" link ir	and approva n the bottom Weight	II, click on the buttor right hand corner. Workflow State	n labeled "A Status	.dd a Ci	riterion". W
Applicant Documents References/Letters of Search Committee Ranking Criteria Posting Documents	Submitting New Ra the Available Evalue Included Evaluation Category Uncategorized	anking Criteria: To submit a new lative Criteria box opens, click or ve Criteria Description Teaching experience in a univ	wone for approval. ranking criterion for review a the "Add a new one" link in ersity	and approva n the bottom Weight	I, click on the buttor right hand corner. Workflow State Under Review by HR	a labeled "A Status active	dd a Cr	riterion". M
<ul> <li>Applicant Documents</li> <li>References/Letters of</li> <li>Search Committee</li> <li>Ranking Criteria</li> <li>Posting Documents</li> </ul>	Submitting New Ra the Available Evalu Included Evaluation Category Uncategorized Uncategorized	anking Criteria: To submit a new lative Criteria box opens, click or ve Criteria Description Teaching experience in a univ Please rate the candidates ex	wone for approval. ranking criterion for review . the "Add a new one" link in ersity perience related to the job:	and approva n the bottom Weight	II, click on the buttor right hand corner. Workflow State Under Review by HR Under Review by HR	Status active active	dd a Cr	riterion". V

### <u>Create New EHRA Posting from a Position Description –</u> <u>Posting Documents Tab</u>

The **Posting Documents Tab** allows you to upload documents as attachments that will route with the posting request through the approval workflow. Attachments can be uploaded as follows:

- **Upload New:** Choose this option if you want to upload a file from your computer.
- **Create New:** Choose this option if you want to create a new file to attach using the PeopleAdmin editor.
- **Choose Existing:** Choose this option if you want to attach a file that has already been uploaded into PeopleAdmin as part of another action.

Excel and Word documents may be attached. PDF conversion must be completed for the document to be valid when applicable:

	Home Postings Hiring Proposals   My Profile Help	
	Linc Butler, you have 0 messages. Supervisor	C logou
Postings / EPA / Assistant Director for HR	Systems (Draft) / Edit: Posting Documents	
Editing Posting	Posting Documents Save <- Prev Ne	ext >>
Posting Details	To add a document to the posting, hover over the blue Action text link to the right of the document name.	
Position Funding Infor	Documents can be uploaded by browsing for the document or a document can be written or previously selected. Document types that are	
Supplemental Questions	supported as attachment include .doc, .docx, .pdf, .rtf, .r	
Applicant Documents	PDF conversion must be completed for the document to	
References/Letters of	Document Type Name Status (Actions)	
Search Committee	Marketing Plan Actions to upload an attachment.	
Ranking Criteria	Print Ad Text Upload New	
Posting Documents	Create New Choose Existing Complete this page by clicking Save <> Prev Ne	xt >>
Summary	on Save and Next>	

### <u>Create New EHRA Posting from a Position Description – Summary Tab</u>

The **Summary Tab** allows you to perform a final review all of the posting information you've entered on the previous tabs prior to sending the request to the next step in the approval workflow. Please review the details of the posting summary carefully before continuing.

The **Blue Circle Check** appears by those tabs for which all required information has been entered:

Posting	s / EPA / Assistant Director for HR Systems (D	Iraft) / Summary		
	Posting: Assistant Director Edit Current Stutus: Draft Position Type: EPA Section/Unit: VC for Human Rection/Unit: VC for Human Rection/Unit: VC for Human Rection Control (1997)	for HR Systems (EPA) Created by: Linc Butter Owner: Linc Butter		Take Action On Posting •            See how Posting looks to Applicant             Print Preview (Applicant View)             Print Preview
	Summary County	Thing Toposia		
	Please review the details of the pos To take the action, select the approy you are ready to submit your postin To edit the posting, click on the <b>Edi</b> make necessary corrections before	ting carefully before continuing. priate <b>Workflow Action</b> by hovering over the orange "Take Action on thi g, click on the <b>Submit</b> button on the popup box. I link next to the <b>Section Name</b> in the <b>Summary Section</b> . This will take moving to the next step in the workflow.	is Posting" button. You may add a Comment to the posting and also add this posting to your Watc you directly to the <b>Posting Page</b> to <b>Edit</b> . If a section has an orange icon with an exclamation poin	<b>h List</b> . in the popup box that appears. When t, you will need to review this section and
	Posting Details Edit     Classification Information     HELP TEXT: If the details below	Click "Edit" to make e	edits to a tab.	
в	ue Circle Check	Assistant Director 82229		
	Classification Type	EPA		
	Salary Range	\$55,000 - \$60,000		
	Minimum Experience/Education			

An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save"**, and then return to the **Summary Tab** by clicking on the link in the left column:

Position Funding Informate	tion <u>Edit</u>	Click "Edit" to make edits to a tab.	
Budget Advisory Approval Orange Circle Exclamation Point	EPA and SPA positi deration of the Comr	ons that are funded in whole or in part by general state fur mittee's review process, state below what mission specific	ds requires approval by A&T's Budget Advisory , essential, and / or key objectives will not be met if the
Mission Specific, Essentia and/or Key Objectives not M without position	et Test		

Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example, the appropriate routing action is **"Send to Department Head (Move to Department Head)"**:

NORTH CAROLINA AAT STATE UNIVERSITY		(Inbox) PeopleAdmin
	Home Postings Hiring Proposals   My Profile	Help
		Linc Butler, you have 0 messages. Supervisor 🔽 C logout
Postings         / EPA / Assistant Director for HR Systems (Draft)         / Survey           Posting:         Assistant Director for HR Systems (Draft)         / Survey           Edit         Current Status:         Draft           Position Type:         EPA         Created           Section/Unit:         VC for Human         Owner:           Summary         History         Settings         Hiring	Click on "Take Action On Pending Request", then select "Send to Department Head" to move the request to the next step in the approval workflow.	Take Action On Posting •         WORKFLOW ACTIONS         Keep working on this Posting         Canceled (move to Canceled)         Send to Department Head (move to Department Head)
Please review the details of the posting care To take the action, select the appropriate <b>W</b> and also add this posting to your <b>Watch Lis</b> box.	fully before continuing. orkflow Action by hovering over the orange "Take Action on the transmitted of transmitted of transmitted of the transmitted of	nis Posting" button. You may add a Comment to the posting t your posting, click on the <b>Submit</b> button on the popup

You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send the action to the next level in the approval workflow, click the **"Submit"** button:



If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation:

"Fund" is required and All required fields must be set before transitioning.		8
North Carolina Age State University	Watch List	APPLICANT TRACKING
Red bar indicating the required fields that need to be completed before submitting the request to the part step in the workflow	Linc Butler, you have 0 messages. Supervisor	C logout
request to the next step in the worknow.	Take Action On Posting 🔻	

Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

Pos	sting was successfully transiti	loned									$\otimes$	ŕ
	NORTH CAROLINA A&T STATE UNIVERSITY							(	Watch List	APPLICANT TRACKING		-
			Home Posti	gs Hiring	Proposals	My Profile	Help					
	<i>a</i>						Linc Butler, yo	ou have 0 messages.	Supervisor	• ¢	logout	
G	reen confirmati	on bar indicat	ting the Pe	nding								
Re	equest was succ	essfully trans	itioned an	d								
ad	dded to your Wa	atch List.										
	Current Status: Departmen	nt Head			J			🛨 See how Pos	sting looks to A	Applicant		

The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

#### <u>Create New EHRA Posting from a Position Description - Saving to Return</u> to a Pending Request Later

On the **Summary Tab** is an important menu item which should be selected if you need to stop a work session on the posting before submitting it to the next level for approval. Following this step will ensure that all your work is saved when you open the request for completion.

- 1) Click the "Save" button located in either the top or bottom right corner
- 2) Select "Summary" from the Tab List (illustrated above)
- 3) Select "Keep Working on this Posting"

	ORTH CAROLINA T STATE UNIVERSITY							Inbox People Watch List APPLIC	Admin	7
			Home Po	ostings	Hiring Proposals	My Profile	Help			
							Linc Butler, you have 0 message	s. Supervisor	▼ C log	gout
Postings / EF	PA / Assistant Director for I osting: Assistant Edit urrent Status: Draft sition Type: EPA action/Unit: VC for Human isources ummary History	IR Systems (Draft) / Summ Director for HR S Created by: Li Owner: Linc E Settings   Hiring Prop	ary Systems (E nc Butler butler Ssals Asso	EPA) ociated Posi	ition Description		Take Action Or workerLow Ac Keep working Canceled (m Send to Dep Department f	n Posting v mons g on this Posting ove to Canceled) artment Head (move to fead)		

- 4) Add any Comments into the window that opens (below) as notes to yourself, if desired.
- 5) Click "Submit"

	Li
ary	Take Action X
or (TLI	Keep working on this Posting
	Enter comments if desired.
utler	-
	Add this posting to your watch list?
Submit	when complete. Submit Cancel
	11
ore cont	inuina

The **Posting** can be located when you log into the Applicant Tracking module again as the same **User Type** you used to begin the action. Hover your cursor over the **Postings tab** and click on "**EHRA**" You will then return to the **EHRA Postings view**, which provides a list of all postings based on your active user type, from which you can search for and select this posting and continue.

#### **Create New Post Doctoral Posting**

To initiate a **Create New Post Doctoral Posting** request, hover your cursor over the **Postings** tab and click on "Post Doctoral", or click on the **Create New Post Doctoral Posting** link located in the **Shortcuts** menu to the right of your **Inbox**:

NORTH CAROLINA A&T STATE UNIVERSITY				Inbox Pe Watch List Af	PPLICANT TRACKING V
	Home Postings Hiring Propos	als   My Profile Help Linc Bu	ıtler, you have 0 message:	s. Supervisor	C logout
and click on Post Doctoral. Welcome to your Online Recruitment and R	Post Doctoral Position Management System				
<ul> <li>Inbox (14 items need your attention)</li> <li>Displaying items for group "Supervisor".</li> <li>Postings (3) Hiring Proposals (0) Pending Requests (10+)</li> </ul>	Or click on Create N Doctoral Posting in	lew Post the Shortcuts	Shortcuts Create New Create New	SPA Posting EPA Posting Post Doctoral Posting	
Job Title Type	Current State	Owner			

You will then be taken to the **EHRA Postings** view, which provides a list of all current/pending EHRA postings initiated based on your active user type as follows:

Active User Type	Positions in Position Descriptions List
Supervisor	Current / pending postings for positions that are direct reports to the Supervisor only.
Department Head	Current / pending postings for all positions that report to the department the Department Head is assigned to.
Dean / Vice Chancellor	Current / pending postings for all positions within the School, College, or Division the Dean / Vice Chancellor is assigned to.

In the **EHRA Postings** view, you can search postings by any number of criteria, including but not limited to position title, posting number, position number, department name, supervisor name, or workflow state. Searches are fully customizable by position and posting attributes, and you can save custom searches for use again later:

NOTITIC CROLINA ALT STATE UNIVERSITY ostings / Post Doctoral Post Doctoral Postings		Home Postings Hiring Propose	IS   My Profile Help Active use Superviso	er type is r.	Inbox         PeopleAdmin           Watch List)         APPLICANT TRACKING ▼           Supervisor         © logou           Create New Posting
Open Saved Search • Search: Add Column: Add C Workflow State Depart Department AD A AD A AVCC	vior tment Head Vice Chancellor ministration Computing of Facilities - Office	Search Hide search options	Searches are custor position attributes saved for later use.	nizable by and can be	
List of current / EHRA postings b user type	pending by active c.				
Position Title	ns Found) Posting Number	Department	Active Applications	Workflow State	Actions (Actions)

To initiate the request, click on the orange **Create New Position Description** button located on the top right of the screen just below the grey bar:

						Inbox Watch List	PeopleAdmin
Home	Postings	Hiring Proposals	My Profile	Help			
					Linc Butler, you have 0 messages.	Supervisor	logout
Search M	ore search online	16			Click here to initiate a Create New Posting request.		Create New Posting

You will then see the Create New menu, asking what you would like to use to create the new posting:

×			
is new			
Click here to Create New Posting from an existing posting.			
Click here to Create New Posting fraining an approved position description.			

#### **Create New Post Doctoral Posting from an Existing Posting**

Select **Create from Posting** if you wish to create a posting using information from a prior posting that has previously been used in the PeopleAdmin system.

**<u>PLEASE NOTE</u>**: If the position classification and/or the position description details have changed, you must start a Modify Position action in the Position Management module prior to posting the position.

Choosing the **Create from Posting** option copies information from a prior posting into a new posting:



After clicking on **Create from Posting,** you will be taken to the **Post Doctoral Postings** view, where you can search any current or pending postings by any number of criteria, including but not limited to position title, posting number, position number, department name, or supervisor name. Searches are fully customizable by position attributes, and you can save custom searches for use again later. If you need assistance in finding the desired posting, please contact the <u>Classification and Compensation Analyst</u> in the Division of Human Resources:

NORTH CAROLINA A&T STATE UNIVERSITY	Hore Posting	Antiinate Hider Property	Dabardina Evante - Liki Roffa Unit		(Inbox) PeopleAdmin Watch List APPLICANT TRACKING
Postings / Post Doctoral Post Doctoral Postings			Active use Supervisor	r type is r.	Human Resources C togo
Open Saved Search - Search: List of current / pendi postings by active use	ng Post Doctoral er type.	More search options	Searches are custo position attributes saved for later use	mizable by and can be	Actions drop down menu.
Search: "All Postings" (1 Item Four	nd) 💿 Posting Number	Department	Active Applications	Workflow State	Actions (Actions)

Once you locate the posting you wish to create from, you can select it by moving your cursor over that posting's corresponding Actions drop down menu located in the far right column and clicking on **Create From**. This drop down menu will also give you the option of **View** if you wish to view the information associated with a particular position description prior to selecting **Create From**:



By clicking **Create From**, the **New Posting** form will appear. This is where you can update the working title of the position for the purpose of posting, and view **Organizational Unit** information to confirm accuracy. You can also provide **Special Offline Application Instructions** in the field provided if necessary. Once all information is entered and confirmed on the **New Posting** page, click on the orange

Create New Posting button to begin updating posting information:

Postings / Post Doctoral / New Posting			
New Posting		Create new	Create New Posting Cancel
* Required Information		posting button.	
Position Title	Post Doctoral Research Associate (TLB40)		
Organizational Unit			
Division/School/College *	VC for Human Resources	Confiri	m Organizational Unit
Department *	VC for Human Resources	inform	ation.
Section/Unit *	VC for Human Resources		
Online Applications			
☑ Accept online applications?			
Special offline application instructions	offline instru	le special e application ctions if	Create new posting button.
	neces	sary.	Create New Posting Cancel

After clicking on the "Create New Posting" button, you will then be taken to the Posting Details tab, the first information tab that must be completed before the new Post Doctoral Posting can be sent to the next step in the approval workflow. Each information tab is listed on the Edit Posting page in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while all other tabs will appear as blue links.

You can save the changes you've made to the active tab you're working on and navigate to the next tab in the list simultaneously by clicking the Next>>> button located in both the top and bottom right corners of the page. You can save the active tab you're working on and stay on the same tab by clicking the "Save" button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column; however, this action WILL NOT save any changes made to the tab you are navigating away from.

Required fields are highlighted in <u>red</u> and must be filled in before the new **Post Doctoral Posting** can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check Circle** also appears next to tabs that do not contain any required fields:

Tab list	Home	Postings Hiring Proposals	My Profile	Help				
				Linc Butler, you have 0 messages.	Supervisor	C logout		
Postings / I st Doctoral / Post Doctoral Rese	earch Associate (TLB40) (Draft) / Edit	t: Posting Details						
Editing Posting	Posting Details		Sav	e and Next button	Sav	ve Next >>		
Posting Details	Ar Chack spalling							
Position Funding Infor	▼ <u>Check spenning</u> ▼			h - <b>N</b>	in the left band on it.			
Supplemental Questions	Proceed through all sections	completing all necessary infor	creen, then click t mation. To submi	he Next button or select the page t the Posting to Human Resource	e in the left hand navig s, you must go to the	pation menu. Posting		
Applicant Documents	Summary Page by clicking on the Next button until you reach the Posting Summary Page or select Posting Summary Page from the left navigation menu. Once a summary page appears, hover your mouse over the grange Action button for a list of possible approval step options.							
References	* Required Information							
Search Committee	Classification Information							
Ranking Criteria	HELP TEXT: If the details t	below are incorrect, please m	ake the appropr	iate Classification selection usi	ng the "Classificatior	n' Tab on the		
Posting Documents	left side menu while modify	ving the Position.			5			
Summary	Position/Classification Title	Post Doc Research Associate						
	Job Code	81069						
Blue Check Circle	Classification Type	Post Doctoral						
	Minimum Experience/Education							

### <u>Create New Post Doctoral Posting from an Existing Posting – Posting</u> <u>Details Tab</u>

Since you are creating a new **Post Doctoral Posting** from a prior posting, many of the fields will already be filled in with information copied from the prior posting. Follow the instructions at the top of the page to complete any remaining required fields, then click the Next button to save changes and navigate to the next tab:

	Home Postings	Hiring Proposals	My Profile	Help		
				Linc Butler, you have 0 messages	Supervisor	C logou
Postings / Post Doctoral / Post Doctoral Re	esearch Associate (TLB40) (Draft) / Edit: Posting	Details				
Editing Posting	Posting Details		Save a	and Next buttons.	Save	Next >>
Posting Details						
Position Funding Infor						
Supplemental Questions	For the section of th	e information on this scree ng all necessary informati	n, then click ti on. To submit	the Next button or select the pag the Posting to Human Resource	e in the left hand navigation es, you must go to the <b>Post</b>	i menu. ting
Applicant Documents	Summary Page by clicking on the Ne navigation menu. Once a summary pa	ext button until you reach t age appears, hover your n	the Posting Su nouse over the	Immary Page or select Posting S e orange Action button for a list of	Summary Page from the left of possible approval step or	t ptions.
References	* Required Information					
Search Committee	Classification Information					
Ranking Criteria	HELP TEXT: If the details below an	e incorrect, please make	the appropri	iate Classification selection us	ing the "Classification' Tal	b on the
Posting Documents	left side menu while modifying the l	Position.				
Summary	Position/Classification Title Post Doe	c Research Associate				
	Job Code 81069		Fie	elds from the prior	<sup>·</sup> posting will be	;
	Classification Type Post Do	ctoral	со	pied in to your ne	w posting.	
	Minimum Experience/Education					

Position Overview				
Primary Purpose of Position Primary Function of Organizational Unit	Test	Position Overview and Position Information: Continue to enter posting information into any empty fields as needed.		
Position Information				
* Position Title	Post Doctoral Research Associate (TLB40)	)		
* Working Title		This field is required.		
Position Number	999999		Pequired fields will be	
* JCAT	12345		highlighted in RED.	
Approved Salary	\$40,000			
* Salary Range	Enter salary to be advertised amount or a c	This field is required.	ith education and experience"	
* FLSA	Exempt			
* Appointment Type	Time Limited - Full-time			
<ul> <li>If Time Limited, Appointment Length</li> </ul>	08/08/2014 Please indicate budget end date. If funded	from more than one fund indicate ear	liest end date. This field cannot be left blank.	
FTE				

You can indicate other users you would like to have **Supervisor** and / or **Applicant Reviewer** access to the posting by searching for their name in the Supervisor and Applicant Reviewer fields. Indicate the proposed **Open Date** and **Date Desired for Closing or Initial Review (minimum 30 days)**, which will define the number of days applicants can view and apply for the posting. The minimum allowable posting period for

Post Doctoral positions is thirty (30) calendar days, however, a Post Doctoral posting can be posted as open until filled. Select the appropriate **Fast Find** category for the posting to ensure it is included in the correct pre-defined search when an applicant clicks on the corresponding Fast Find button through the applicant portal. Choices are Administrators and Research, Faculty, Post Doctoral, Temporary Staff, and Staff:



Include details regarding any special advertising requests, such as posting the position on additional job posting websites or in specific print media outlets, in the **Advertising Summary** field. A link to the job posting on the North Carolina A&T State University applicant portal will be included in any special advertising. The **Pass Message** and **Fail Message** fields contain template notifications that will be sent to applicants who are screened out of the posting through **Supplemental Questions**. Once all fields on the Posting Details Tab are complete, click the Next button to save your changes and move to the next tab. You can also click the "Save" button if you wish to save your changes and keep working on the current tab:

Advertising Summary		Include any special advertising request information.
	Please list additional external advertising sources if different than standard at Standard sources include: NC Employment Security Commission & UNC Get	dvertising sources. neral Administration
<ul> <li>Pass Message</li> </ul>	Thank you for your interest in this position. The screening and selection process is currently underway and will continue until a successful candidate is chosen. Should review of your qualifications result in a decision to pursue your candidacy, you will be contacted.	Template applicant e-mail notifications.
* Fail Message	Thank you for your interest in this position. Based on your responses to the questions on the employment application, you do not meet the minimum qualifications for this position. Please do not let this discourage you from applying for other positions that interest you.	
	Save and N	lext buttons.

### <u>Create New Post Doctoral Posting from an Existing Posting – Position</u> <u>Funding Information Tab</u>

Funding Source information from the prior posting will copy over into the fields in the Funding Source Details section of this tab, and you can make edits as necessary. **PLEASE NOTE:** The annual amount budgeted must support the hiring range indicated on the Posting Details Tab.

If you are unsure of what fund to use, the most up to date information may be found in **Banner Finance** on these forms:

- 1) FTVORGN- Provides a list of Org Codes
- 2) FTVFUND- Provides a list of Funds
- 3) FTVACCT- Provides a list of Accounts

These forms show listings of all active funds. For additional help, refer to the Banner Training Guide.

If the position has more than one funding source, click on the **Add Funding Source Details Entry** button and **"Save"** until all sources have been entered. **PLEASE NOTE:** Each time you add an additional entry, you will need to **scroll down below the last saved entry** to enter a new funding source. Once all funding sources have been added, click Next>>> to move to the next tab:

Funding Source Details			
Indicate the funding source must equal the requested	e(s) for this position. Click on "Add Funding Source salary.	Details Entry" to enter budget and other required codes. Select "SAVE" after each	entry. Please note that the annual amount budgeted
If the position has more the below the last saved entry	an one funding source, continue to select "Add Fur to enter a new funding source.	iding Source Details Entry" and "Save" until all sources are entered. Each time you	add an additional entry, you will need to scroll down
State Appropriated * Funding / Non-State Appropriated Funding	State Appropriated Funding	Funding information	
If non-state, select source of funding	Please select	will be copied in from	
If other, designate source		the prior posting,	
* Budget Code	16070 (State)	which you can edit as	
* Fund	111111 Format: 6 digit number #######	necessary.	
• Org	11111 Format: 5 digit number ######		
* Account	11111 Format: 5 digit number ######		<b>IMPORANT NOTE:</b>
* Program	111 Format: 3 digit number ###		Remember to click
Date Funds End			funding source is
* Annual Amount	\$45,000	Click here to add a funding source. If	entered
* Percentage of FTE	1.0	the position has more than one funding	
Remove Entry?     Add Funding Source Details E	ntry	source, continue to click here until all funding sources are entered.	Save <> Prev Next>>

## <u>Create New Post Doctoral Posting from an Existing Posting –</u> <u>Supplemental Questions Tab</u>

In the **Supplemental Questions** tab, you can identify screening questions related to an applicant's education and experience that must be answered as part of the application process. To add supplemental questions to your posting, click on the button labeled **"Add a Question"**. A pop up section will appear where you can add an existing question or submit a new one. Once done, click on the Next>>> button to save changes and proceed to the next tab:

Editing Posting	Supplemental Questions		Save <> Prev Next		
Posting Details	Adding New Posting Questions: Click on the button labele	d "Add a Question". A pop up section will appear wh	ere you can add an existing		
Position Funding Infor	question or create a new one.				
Supplemental Questions	Adding Existing Posting Questions: There are two ways to search for approved posting questions to add to the job being posted. You can filter using the key word search or filter by question category				
Applicant Documents	Assign Points or Disgualifying Responses: Click on the guestion that has been added and a drondown menu will appear where points and				
References	disqualifying responses can be associated to the posting of	question.	an appear anere pointo ana		
Search Committee	Posting Question Options: Once questions have been add	ded to the posting, you will see a column of checkbox	es to the left of each question;		
Ranking Criteria	checking these boxes will make a question required.				
Posting Documents	Included Supplemental Questions	Click to add supplements	Add a questi		
Summary	Position Required Category Qu		Statu		
		questions.			

Adding Existing Posting Questions: There are two ways to search for approved posting questions to add to the job being posted: by key word search or by question category. To add an existing question, click the check box next to the question you wish to add.

**Submitting New Posting Questions:** To submit a new question for review and approval, click on the button labeled "Add a Question". When the **Available Supplemental Questions** box opens, click on the **"Add a New One"** link in the bottom right hand corner.

Add	gory: Any Category	Question	•	Filter supplemental question by keyword or category.
	Uncategorized	How did you hear about this employment op	portunity?	, ,
	Experience	Do you have at least one year of responsible experience?	e payroll or financial and stati	stical record keeping
	Education	Do you have a high school diploma or equiv	alent?	
	Experience	Do you have HR experience?		
	Education	Do you have a High School diploma?		V
	Education	Do you have a Master's Degree?		
	Education	Do you have a Master's Degree?		n
	Experience	How many years of Accounting experience of	la uau hava in a hiahas advas	tion action?
	Education	Do you have a High School diploma?	Click to submit a cust	om supplemental
	Experience	Do you have at least 4 years of experience?	question for review a	ind approval.
	Education Experience	Do you have a High School diploma? Do you have at least 4 years of experience?	Click to submit a cust question for review a	om supplemental and approval.

Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear where points and disqualifying responses can be associated to the posting question.

**Posting Question Options:** Once questions have been added to the posting, you will see a column of checkboxes to the left of each question; checking these boxes will make a question required.

Position	Required	Category	Question			Status	
1		Uncategorized	How did you hear about th	is employment opportunity?		active	
2		Experience	Do you have at least one y keeping experience?	ear of responsible payroll or financial and s	statistical record	active	×
3		Education	Do you have a High Scho		1	active	×
4		Experience	How many years of Accou	Assign points to answers.	ucation setting?	active	×
			Possible Answers: Predef	ined Options	Disqualifying		
Ľ	Click to ma required.	ake questions	1. 0 years 2. 1-3 years 3. 4-5 years 4. 5+ years				
eorde	r question	s.		Click to assign disqualifying	answers.		

### <u>Create New Post Doctoral Posting from an Existing Posting – Applicant</u> <u>Documents Tab</u>

In the **Applicant Documents** tab, Applicant documents can be included in the application process by selecting **Included** to make the documents optional and **Required and Included** to make the document(s) mandatory to complete the application process. Documents attached by the applicant during the application process will be accessible for viewing during applicant review. Once done, click on the Next>>> button to save changes and proceed to the next tab:

liting Posting	Click Included to make uploading a documen	e t optional.	Click <u>both</u> Included <u>and</u> Required to make uploading a document required
Posting Details	<ul> <li>Included to make the document(s) r</li> </ul>	ro	
Position Funding Infor	Orden Name	handatory to complete t	Desvice do
Supplemental Questions	Order Name	Included?	Required?
Applicant Documents	1 Resume		
References			
Search Committee	2 Cover Letter		
Ranking Criteria		_	
Posting Documents	3 Curriculum Vitae		
Summary	4 Teaching Philosophy		
	5 Letter Of Reference 1		
	6 Letter Of Reference 2		
	7 Letter Of Reference 3		

#### <u>Create New Post Doctoral Posting from an Existing Posting – References</u> / Letters of Recommendation Tab

In the **References / Letters of Recommendation** tab, you can indicate whether or not you wish to require applicants to submit references with their application. You can also indicate the minimum and maximum number of references you would like applicants to submit, and the cutoff date by which reference information must be submitted: 174

Postings / Post Doctoral / Post Doctoral Re	search Associate (TLB40) (Draft) / Edit: References
Editing Posting	References Save << Prev Nex
Posting Details  Position Funding Infor  Supplemental Questions  Applicant Documents  References  Search Committee  Ranking Criteria  Posting Documents	<ul> <li>Check spelling </li> <li>Accept References: Please indicate whether or not you wish to require applicants to submit references with their application.</li> <li>Minimum Requests: Please indicate the minimum number of references you would like applicants to submit.</li> <li>Maximum Requests: Please indicate the maximum number of references you would like applicants to submit.</li> <li>Cutoff Date: Please indicate the date by which reference information must be submitted.</li> <li>* Required Information</li> <li>References</li> </ul>
Summary Reference information may not be submitted after this date.	Accept References Minimum Requests Maximum Requests Cutoff Date

# <u>Create New Post Doctoral Posting from an Existing Posting – Search</u> <u>Committee Tab</u>

Search Committees are advisory in nature and serve the purpose of recruiting a qualified applicant pool, reviewing their credentials, and recommending acceptable candidates to the hiring manager. Search Committees can consist of University employees both internal and external to the hiring unit, as well as individuals external to the University who represent key stakeholders.

In the **Search Committee** tab, you can assign search committee members who will have access to review application information for a specific posting. Search committee members can view applications, applicant documents, and evaluate / rank applicants based upon ranking criteria you establish as part of the posting. Requests to add search committee members will be reviewed and approved by the Division of human Resources (DHR) once the posting request is routed to DHR for approval. Upon DHR approving a search committee member's access, the search committee member will receive an e-mail notification with instructions on how to access the online posting and related application information:

Editing Posting	Search Committee		Save << Prev Next >			
Posting Details	Search Committees are advisory in pat	ure and convertible numbers of recruiting a qualified applicant pool, reviewing the	oir crodontials, and			
Position Funding Infor	recommending acceptable candidates to the hiring manager. Search Committees can consist of University employees both internal and external to the hiring unit, as well as individuals external to the University who represent key stakeholders.					
Supplemental Questions						
Applicant Documents	Search Committee Members	Search Committee Members				
References/Letters of	No Search Committee Members have been assigned to this Posting yet.					
Search Committee	Dearch					
Ranking Criteria	Search					
Posting Documents	Find a User to assign as a Search Com	Find a User to assign as a Search Committee Member.				
Summary						
	First Name					
	Last Name	To search for a pre-approved search				
	Email Address	committee member, enter the name and				
		diak the Secret button				

After searching for a pre-approved search committee member, click on the **Add Member** button to add them to your search committee. You can also make a search committee member the chair of the search committee by clicking on the check box next to **"Make Member the Committee Chair"**:

Search Committee Membe	rs
No Search Committee Members h	Click the check box to assign the
Search	search committee member as the committee chair.
Find a User to assign as a Search	Committee Memer.
Name Email Address	Add Member
Lonnie Crotts emailaddress@zed.zed	Add Member Make Member The Committee Chair
<b>-</b>	
First Name Lonnie	
Last Name Crotts	Click the Add Member button to add
Email Address	the search committee member you searched for.
Search	

To create an account for a new search committee member, enter in the committee member's name, current e-mail address, and desired username, then click on the **Submit** button:

New Search Committee Member							
Request that someone be granted access to the system for the purpose of serving as a Search Committee Member.							
Required fields are indicated with an asterisk (*).							
Account Information							
Please enter the following information to create an account for a	new Search Committee Member.						
* Last Name							
* Email							
* Username							
Submit	To create an account for a new search committee member, complete the fields and click submit.	<pre></pre>					

If the requested search committee member is already an assigned user of the PeopleAdmin system, their user account information will be displayed, and you can add them to your search committee by clicking on the **Add User** button:

Mat					
Username	ambraun				
First Name	Amy				
Last Name	Braun	Click the Add User button to add the new			
Email Droformed Crean	emailaddress@zed.zed	search committee member in a pending			
Preferred Group	b Employee	status Access will be reviewed and			
Add User		approved by DHP			
Clear Matching I	leore	approved by DRK.			
Clear Matching C	15615				
New Search C	committee Member				
Request that some	eone be granted access to th	he system for the nurnose of serving as a Search Committee Membe	r		
ricquest that some	some be granted decess to th	is system for the pulpose of serving us a search committee member			
Required fields are	e indicated with an asterisk (	*).			
Account Informa	ation				
Please enter the	following information to cre	eate an account for a new Search Committee Member			
* First Nam	e Amy				
* Last Nam	e Braun				
* Email	ambraun@ncat.edu				
* Username	e ambraun				
Submit					
			Save	<< Prev	Next >>

## <u>Create New Post Doctoral Posting from an Existing Posting – Ranking</u> <u>Criteria Tab</u>

**Ranking Criteria** can be used by search committees during the applicant review process to rank applicants based upon job-related experience and education factors. This optional tool can be helpful in identifying the most qualified candidates in an applicant pool. Ranking criteria are not presented to the applicant:

Editing Posting	Ranking Criteria	Save << Prev Next >			
Posting Details	Ranking Criteria can be used used by experience and education factors. Thi	search committees during the applicant review process to rank applicants based upon job-related s optional tool can be helpful in identifying the most qualified candidates in an applicant pool. Ranking			
Position Funding Infor	criteria are not presented to the applicant.				
Supplemental Questions	Adding New Ranking Criteria: Click on the button labeled "Add a Criterion". A dialog box will appear where you can add an existing criterion by				
Applicant Documents	checking the box in the "Add" column	or submit a new one for approval.			
S	Cubmitting New Depking Criterie: Tex				
	Submitting New Ranking Chiena. To s	ubmit a new ranking criterion for review and approval, click on the button labeled Add a Criterion". When			
References/Letters of	the Available Evaluative Criteria box o	ubmit a new ranking criterion for review and approval, click on the button labeled. Add a Criterion", when pens, click on the "Add a new one" link in the bottom right hand corner.			
<ul> <li>References/Letters of</li> <li>Search Committee</li> </ul>	the Available Evaluative Criteria box c	ubmit a new ranking criterion for review and approval, click on the button labeled. Add a Criterion", when pens, click on the "Add a new one" link in the bottom right hand corner.			
<ul> <li>References/Letters of</li> <li>Search Committee</li> <li>Ranking Criteria</li> </ul>	the Available Evaluative Criteria Included Evaluative Criteria Category Description	ubmit a new ranking criterion for review and approval, click on the button labeled. Add a Criterion', whe pens, click on the "Add a new one" link in the bottom right hand corner.  Add a Criterio  Add a Criterio  Status			
<ul> <li>References/Letters of</li> <li>Search Committee</li> <li>Ranking Criteria</li> <li>Posting Documents</li> </ul>	Included Evaluative Criteria Category Description	ubmit a new ranking criterion for review and approval, click on the button labeled. Add a Criterion", whe pens, click on the "Add a new one" link in the bottom right hand corner.  Click to add ranking criteria.  Status			

To add ranking criteria, click on the button labeled **"Add a Criterion"**. A dialog box will appear where you can add an existing criterion by checking the box in the "Add" column or submit a new one for approval. To submit a new ranking criterion for review and approval, click on the button labeled **"Add a Criterion,"** then click on the **"Add a new one"** link in the bottom right hand corner of the dialog box that opens:

Category: Any Add Category	Keyword:     Description		Search for ranking criteria b keyword or category.
Uncategoriz	ed Rank Experience - 5 is Possible Answers: 1. 1 2. 2 3. 3 4. 4 5. 5	s the highest Indicate the appli- that allows an app	cant workflow state plicant to be ranked.
	Applicant workflow	state Under Review by HR	
Uncategoriz	Applicant workflow and the candid	state Under Review by HR	Click to submit a custom ranking
Uncategoriz Uncategoriz	Applicant workflow seed Please rate the candid ed Teaching experience i	state Under Review by HR dates experience related to the n a university	Click to submit a custom ranking criterion for review and approval.

Editing Posting	Ranking Crite	ria	Click Save or Ne	ext to m		Save	e <<	Prev
Posting Details	Ranking Criteria ca	n be used used by search c			applican	ts based up	on job-	related
Position Funding Infor	criteria are not pres	ented to the applicant.	to the next tab.		didates	in an applic	cant poo	ol. Ranking
Supplemental Questions	Adding New Rankir	ng Criteria: Click on the butto	n labeled "Add a Criterion". A	dialog box wi	II appear where you	ı can add aı	n existir	ng criterion
	CDECKING the box in	checking the box in the "Add" column or submit a new one for approval.						
Applicant Documents			1					
<ul> <li>Applicant Documents</li> <li>References/Letters of</li> </ul>	Submitting New Ra the Available Evalu	nking Criteria: To submit a n ative Criteria box opens, clicl	ew ranking criterion for review k on the "Add a new one" link i	and approva	I, click on the buttor right hand corner.	n labeled "A	Add a Ci	riterion". W
<ul> <li>Applicant Documents</li> <li>References/Letters of</li> <li>Search Committee</li> </ul>	Submitting New Ra the Available Evalu	nking Criteria: To submit a n ative Criteria box opens, clicl <b>/e Criteria</b>	ew ranking criterion for review k on the "Add a new one" link i	and approva in the bottom	I, click on the buttor right hand corner.	n labeled "A	Add a Ci	riterion". W Add a Crit
Applicant Documents     References/Letters of     Search Committee     Ranking Criteria	Submitting New Ra the Available Evalu Included Evaluativ Category	nking Criteria: To submit a n ative Criteria box opens, clici <b>ve Criteria</b> Description	ew ranking criterion for review k on the "Add a new one" link i	and approva in the bottom Weight	I, click on the buttor right hand corner. Workflow State	n labeled "A Status	Add a Ci	riterion". W Add a Crit
Applicant Documents     References/Letters of     Search Committee     Ranking Criteria     Posting Documents	Submitting New Ra the Available Evalu Included Evaluativ Category Uncategorized	nking Criteria: To submit a n ative Criteria box opens, clici ve Criteria Description Teaching experience in a t	ew ranking criterion for review k on the "Add a new one" link i university	and approva in the bottom Weight	I, click on the buttor right hand corner. Workflow State Under Review by HR	n labeled "A Status active	Add a Ci	riterion". W
<ul> <li>Applicant Documents</li> <li>References/Letters of</li> <li>Search Committee</li> <li>Ranking Criteria</li> <li>Posting Documents</li> </ul>	Submitting New Ra the Available Evalu Included Evaluativ Category Uncategorized Uncategorized	nking Criteria: To submit a n ative Criteria box opens, clici re Criteria Description Teaching experience in a Please rate the candidates	ew ranking criterion for review k on the "Add a new one" link i university s experience related to the job.	and approva in the bottom Weight	II, click on the buttor right hand corner. Workflow State Under Review by HR Under Review by HR	n labeled "A Status active active	Add a Ci	riterion". W

### <u>Create New Post Doctoral Posting from an Existing Posting – Posting</u> <u>Documents Tab</u>

The **Posting Documents Tab** allows you to upload documents as attachments that will route with the posting request through the approval workflow. Attachments can be uploaded as follows:

- **Upload New:** Choose this option if you want to upload a file from your computer.
- Create New: Choose this option if you want to create a new file to attach using the PeopleAdmin editor.
- Choose Existing: Choose this option if you want to attach a file that has already been uploaded into PeopleAdmin as part of another action.

Excel and Word documents may be attached. PDF conversion must be completed for the document to be valid when applicable:

Editing Posting	Posting Documents	Save << Prev Next
Posting Details	To add a document to the posting, hover over the blue Action text link to the right of the document	ent name.
Position Funding Infor	Documents can be uploaded by browsing for the document or a document can be written or pre-	eviously selected. Document types that are
Supplemental Questions	supported as attachment include .doc, .docx, .pdf, .tdf dx_txt_tiff_tif_ipeg_ipe_ipg_pg_xt converted to .pdf for security.	le and view All documents uploaded will be
Applicant Documents	PDF conversion must be completed for the docume Click "Actions", then see	elect Upload New,
References/Letters of	Document Type Name Status (Actions) Create New, or Choose	e Existing in order
Search Committee	Marketing Plan Actions to upload an attachme	ent.
Ranking Criteria	Print Ad Text Upload New	
Posting Documents	Create New Choose Existing	Save << Prev Next
Summary	Complete this page by cl	licking

## <u>Create New Post Doctoral Posting from an Existing Posting – Summary</u> <u>Tab</u>

The **Summary Tab** allows you to perform a final review all of the posting information you've entered on the previous tabs prior to sending the request to the next step in the approval workflow. Please review the details of the posting summary carefully before continuing.

The Blue Circle Check appears by those tabs for which all required information has been entered:

Posting	stings / Post Doctoral / Post Doctoral Research Associate (TLB40) (Draft) / Summary					
	Posting: Post Doctoral Res (Post Doctoral) Edit Current Status: Draft Position Type: Post Doctoral SectionUnit: VC for Human Resources	earch Associate (TLB40) Sreated by: Linc Butter Swner, Linc Butter	Take Action On Posting •         *       See how Posting looks to Applicant			
ſ	Summary History Settings	Hiring Proposals Associated Position Description				
	Please review the details of the pos To take the action, select the appro- you are ready to submit your postin To edit the posting, click on the Edi make necessary corrections before Posting Details Edit Classification Information	ing carefully before continuing. viriate Workflow Action by hovering over the orange "Take Action on this Posting" button. You may add a Comment to the posting and also add this posting to your Wate a, click on the Submit button on the popup box. Link next to the Section Name in the Summary Section. This will take you directly to the Posting Page to Edit. If a section has an orange icon with an exclamation poin moving to the next step in the workflow. Click "Edit" to make edits to a tab. are incorrect, beese make the appropriate classification selection using the classification tao on the left spin menu while modifying the Position.	<b>h List</b> . In the popup box that appears. When t, you will need to review this section and			
В	lue Circle Check	Post Doc Research Associate 81069				
	Classification Type Minimum Experience/Education	Post Doctoral				

An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save"**, and then return to the **Summary Tab** by clicking on the link in the left column:

Position Funding Information Edit	Click "Edit" to make edits to a tab.	
Budget Advisory Approval		l
Orange Circle EPA and SPA positi deration of the Commentation Point	ons that are funded in whole or in part by general state fun nittee's review process, state below what mission specific,	ds requires approval by A&T's Budget Advisory essential, and / or key objectives will not be met if the
Mission Specific, Essential and/or Key Objectives not Met without position		

Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example, the appropriate routing action is **"Send to Department Head (Move to Department Head)"**:

	<b>People</b> Admin
AAT STATE UNIVERSITY Watch List	APPLICANT TRACKING
Home Postings Hiring Proposals   My Profile Help	
Linc Butler, you have 0 messages. Supervisor	C logout
Postings / Post Doctoral / Post Doctoral Research Associate (TLB40) (Draft) / Summary	
<ul> <li>Posting: Post Doctoral Research (Post Doctoral) Edit Current Status: Draft</li> <li>Position Type: Post Doctoral Section/Unit: VC for Human Resources</li> <li>Summary History Settings Hiring Pr</li> </ul>	l I) Iove to
Please review the details of the posting carefully before continuing.	
To take the action, select the appropriate <b>Workflow Action</b> by hovering over the orange "Take Action on this Posting" button. You may add a Comment to and also add this posting to your <b>Watch List</b> . in the popup box that appears. When you are ready to submit your posting, click on the <b>Submit</b> button on th box.	o the posting ne popup
To edit the posting, click on the Edit link next to the Section Name in the Summary Section. This will take you directly to the Posting Page to Edit. If a san orange icon with an exclamation point, you will need to review this section and make necessary corrections before moving to the next step in the work	section has flow.

You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send the action to the next level in the approval workflow, click the **"Submit"** button:

Take Action	
Send to Department Head (move to Department Head)	
Comments (optional)	Comments are optional and can be
	viewed by the next level approver in the History tab.
Add this pending request to your watch list?	Adding the action to your Watch List allows you to easily track and monitor the action's progress.
Submit Cancel	

If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation:

"Fund" is required and All required fields must be set before transitioning.		$\otimes$
NORTH CAROLINA A&T STATE UNIVERSITY	Watch List APPLICANT TRACKING	3 •
Red bar indicating the required fields that need to be completed before submitting the request to the next step in the workflow.	Linc Butler, you have 0 messages. Supervisor 💌 C	logout
· ·	Take Action On Posting	_
Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

(	Posting was successfully transitioned			8
	ART STATE UNIVERSITY	Watch List APPLICANT TRACKING Home Postings Hiring Proposals   My Profile Help Ing the Pending ioned and See how Posting looks to Applicant		
	Home Postings Hiring Proposals   My Profile Help			
	Linc Butler, you have 0 message	s. Supervisor	▼ Ċ	logout
	Green confirmation bar indicating the Pending			T TRACKING
	Request was successfully transitioned and			
	added to your Watch List.			
	Current Status: Department Head	osting looks to A	Applicant	

The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

# <u>Create New Post Doctoral Posting from an Existing Posting - Saving to</u> <u>Return to a Pending Request Later</u>

On the **Summary Tab** is an important menu item which should be selected if you need to stop a work session on the posting before submitting it to the next level for approval. Following this step will ensure that all your work is saved when you open the request for completion.

- 1) Click the "Save" button located in either the top or bottom right corner
- 2) Select "Summary" from the Tab List (illustrated above)
- 3) Select "Keep Working on this Posting"

NORTH CAROLINA					Inbox	PeopleAdmin
A&I STATE UNIVERSITY					Watch List	APPLICANT TRACKING
	Home Postin	gs Hiring Proposals	My Profile	Help		
				Linc Butler, you have 0 messages.	Supervisor	r C
ngs / Post Doctoral / Post Doctoral Research As	ociate (TLB40) (Draft) / Summary					
Posting: Post Doctoral Res	earch Associate (TLB	40)		Take Action On F	Posting v	
Current Status: Draft				Keep working o	on this Posting	9
Position Type: Post Doctoral	Created by: Linc Butler			Canceled (mov Send to Depart	e to Canceleo ment Head (r	d) nove to
Resources	Jwner: Linc Butier			Department He	ad) `	
Summary History Settings	Hiring Proposals Associate	d Position Description				
Please review the details of the pos	ting carefully before continuing					
To take the action, select the appro and also add this posting to your <b>W</b> box.	priate Workflow Action by hov atch List. in the popup box that	ering over the orange "Ta t appears. When you are	ke Action on this ready to submit y	s Posting" button. You may add a your posting, click on the <b>Submit</b>	Comment t button on tl	to the posting he popup
To addit the posting, click on the Edi	tinten en de de constinue Manue		771 C			10 A

4) Add any Comments into the window that opens (below) as notes to yourself, if desired.

#### 5) Click "Submit"



The **Posting** can be located when you log into the Applicant Tracking module again as the same **User Type** you used to begin the action. Hover your cursor over the **Postings tab** and click on "**EHRA**" You will then return to the **EHRA Postings view**, which provides a list of all postings based on your active user type, from which you can search for and select this posting and continue.

### **Create New Post Doctoral Posting from a Position Description**

Select **Create from Position Description** if you wish to create a posting using information from a position description that has previously been approved in the PeopleAdmin system.

**PLEASE NOTE:** If the position classification and/or the position description details have changed, you must start a Modify Position action in the Position Management module prior to posting the position.

Choosing the **Create from Position Description** option copies information from an existing position description into a new posting:



After clicking on Create from Position Description, you will be taken to the Post Doctoral Position Descriptions view, where you can search position descriptions by any number of criteria, including but not limited to position title, posting number, position number, department name, or supervisor name. Searches are fully customizable by position attributes, and you can save custom searches for use again later. If you need assistance in finding the desired position description, please contact the Classification and Compensation Analyst in the Division of Human Resources:

NORTH CAROLINA AGT STATE UNIVERSITY							Inbox P Watch List	eopleAdmin PPLICANT TRACKING
stings / Post Doctoral / Create from Post Doctoral Positio	Position Description		Home Postings Hiring Po	roposals   My Profile F	Active user t Supervisor.	ype is	Supervisor	▼ ¢
Open Saved Search + Add Colt Departm	Search: umn: Add Column AD Administration AD Administration AVC of Facilities - Office AVC of Pacence Series 8	ting B	Search Hide search options	Searches position saved for	are custom attributes au r later use.	izable by nd can be		
List of current position desc	t / pending F riptions by a	Post Doctoral active user typ	pe.				Actio dow	ons drop n menu.
_	Rost Doctoral Resition D	esc 🔇						
Ad hoc urch	Vestoral Resition Descript	iona" (2 Itoms Found)						
Ad hoc unch	Position Number	tions" (2 Items Found) Employee First Name	Employee Last Name	Position/Classification Title	Department	Supervisor	Status	(Actions)
Ad hoc urch C Search: "Post E Working Position Title Post Doctoral Research Associate	Position Descript Position Number 010002	tions" (2 Items Found) Employee First Name	Employee Last Name	Position/Classification Title Post Doc Research Associate	Department Bioenergy Center	Supervisor Human Resources Consultant (Amy Braur	Status	(Actions)

Once you locate the position description you wish to create from, you can select it by moving your cursor over that position description's corresponding Actions drop down menu located in the far right column and clicking on Create From. This drop down menu will also give you the option of View if you wish to view the information associated with a particular position description prior to selecting Create From:



By clicking Create From, the New Posting form will appear. This is where you can update the working title of the position for the purpose of posting, and view Organizational Unit information to confirm accuracy. You can also provide Special Offline Application Instructions in the field provided if necessary. Once all information is entered and confirmed on the **New Posting** page, click on the orange

**Create New Posting** button to begin updating posting information:

Postings / Post Doctoral / New Posting  New Posting  · Required Information		Create new posting button.	Create New Posting Cancel
Position Title	Post Doctoral Research Associate (TLB40)	,	
Organizational Unit Division/School/College *	VC for Human Resources	Confir	m Organizational Unit
Department *	VC for Human Resources	inform	ation.
Section/Unit *	VC for Human Resources		
Online Applications			
Special offline application instructions	Inclue	de special	
	offlin instru	e application uctions if	Create new posting button.
	neces	ssary.	Create New Posting Cancel

After clicking on the "Create New Posting" button, you will then be taken to the Posting Details tab, the first information tab that must be completed before the new Post Doctoral Posting can be sent to the next step in the approval workflow. Each information tab is listed on the Edit Posting page in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while all other tabs will appear as blue links.

You can save the changes you've made to the active tab you're working on and navigate to the next tab in the list simultaneously by clicking the Next>>> button located in both the top and bottom right corners of the page. You can save the active tab you're working on and stay on the same tab by clicking the "Save" button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column; however, this action WILL NOT save any changes made to the tab you are navigating away from.

Required fields are highlighted in <u>red</u> and must be filled in before the new **Post Doctoral Posting** can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check Circle** also appears next to tabs that do not contain any required fields:

Tab list	Home F	Postings Hiring Proposals	My Profile	Help		
	Home       Postings       Hiring Proposals       My Profile       Help         Linc Butler, you have 0 messages.       Supervisor       I logout         I Doctoral / Post Doctoral Research Associate (TLB40) (Draft) / Edit: Posting Details       I optication       Image: Supervisor       Image: Sup					
Postings / I st Doctoral / Post Doctoral Rese	arch Associate (TLB40) (Draft) / Edit	t: Posting Details				
Editing Posting	Posting Details		Sav	e and Next button	c S	ave Next >>
Posting Details			547		3.	
Position Funding Infor	▼ <u>Check spenning</u> ▼					
Supplemental Questions	Proceed through all sections	completing all necessary informa-	ation. To submit	the Next button or select the page t the Posting to Human Resource	s, you must go to the	Posting
Applicant Documents	Summary Page by clicking or navigation menu. Once a sum	In the Next button until you react mmary page appears, hover your	i the Posting Si mouse over th	ummary Page or select Posting S e orange Action button for a list o	ummary Page from t f possible approval s	Save Next >> d navigation menu. to the <b>Posting</b> from the left oval step options. ication' Tab on the
References	* Required Information					
Search Committee	Classification Information		osals       My Profile       Help         Linc Buttler, you have 0 messages.       Supervisor       I logout         Save and Next buttons.       Save       Next>>>         this screen, then click the Next button or select the page in the left hand navigation menu.       information. To submit the Posting to Human Resources, you must go to the Posting ou reach the Posting Summary Page or select Posting Summary Page from the left ver your mouse over the orange Action button for a list of possible approval step options.         ase make the appropriate Classification selection using the "Classification' Tab on the ate			
Ranking Criteria	HELP TEXT: If the details b	pelow are incorrect, please ma	ke the appropr	riate Classification selection usi	ng the "Classificatio	on' Tab on the
Posting Documents	left side menu while modifyi	ing the Position.			0	
Home       Postings       Hiring Proposals       My Profile       Help         Linc Butler, you have 0 messages.       Supervisor       C         Postings / Int Dectoral Research Associate (TLB40) (Draft) / Edit: Posting Details       Inc Butler, you have 0 messages.       Supervisor       C         Editing Posting       Posting Details       Save and Next buttons.       Save Next         Posting Details       Check spelling       Save and Next buttons.       Next>         © Position Funding Infor       O supplemental Questions       Summary Page or select Posing to Human Resources, you must go to the Posting Summary Page by Cicking on the Next button or select the page in the left hand navigation menu.         Proceed through all sections completing all necessary information.       To submit the Posting Summary Page or select Posting Summary Page Posticking on the Next button until you reach the Posting Decuments         @ Ranking Criteria       Heile Pitteria       Postion Postion Postion.         Posting Documents       Postion Postion.       Postion Postion.         Blue Check Circle       Noimmary       Post Dock Research Associate       Job Code       81069 <t< th=""><th></th></t<>						
	Job Code	81069				visor C logout
Blue Check Circle	Classification Type	Post Doctoral				
	Minimum Experience/Education					

# <u>Create New Post Doctoral Posting from a Position Description – Posting</u> <u>Details Tab</u>

Since you are creating a new **Post doctoral Posting** from an approved position description, many of the fields will already be filled in with information copied from the position description. Follow the instructions at the top of the page to complete any remaining required fields, then clice button to save changes and navigate to the next tab:

	Home Postings	Hiring Proposals	My Profile	Help	
				Linc Butler, you have 0 messages	. Supervisor 🔽 C logou
Postings / Post Doctoral / Post Doctoral R	s / Post Doctoral / Post Doctoral Research Associate (TLB40) (Draft) / Edit: Posting Details  Posting Posting Details  Position Funding Infor  Supplemental Questions Applicant Documents References Search Committee Ranking Criteria Posting Documents Summary  Posting Documents Summary Classification Information HELP TEXT: If the details below are incorrect, plead left side menu while modifying the Position.  Position/Classification Type Post Doctoral	Details			
Editing Posting	Home       Postings       Hiring Proposals         atting Posting       Posting Details         Posting Details       Posting Details         Position Funding Infor       Supplemental Questions         Applicant Documents       References         Search Committee       Ranking Criteria         Posting Documents       Classification Information         Summary       Pistion Classification         Posting Documents       Posting Decails (Classification Type         Posting Documents       Posting Classification         Posting Documents       Posting Classification         Summary       PostionClassification         PostionClassification       Post Doc Research Associate         Job Code       81069         Classification Type       Post Doctoral         Minimum       Experience/Education	Save a	and Next buttons.	Save Next >>	
Posting Details					
Linc Butter, you have 0 messages.       Supervisor       Image: Control of the control of th					
Hone       Postings       Hing Proposals       My Pro         ngs / Post Doctoral / Post Doctoral Research Associate (TLB40) (Draft) / Edit: Posting Details	en, then click ti ition. To submit	he <b>Next</b> button or select the page t the Posting to Human Resource	e in the left hand navigation menu. es, you must go to the <b>Posting</b>		
Applicant Documents	Summary Page by clicking on the Ne navigation menu. Once a summary pa	ext button until you reach age appears, hover your	the Posting Su mouse over the	ummary Page or select Posting S e orange Action button for a list o	Summary Page from the left of possible approval step options.
References	* Required Information	5 11 7 7		5	
Search Committee	Classification Information				
Ranking Criteria	HELP TEXT: If the details below an	e incorrect please mak	e the appropri	iate Classification selection usi	ing the "Classification' Tab on the
Posting Documents	rost Doctoral / Post Doctoral Research Associate (TLB40) (Draft) / Edit: Posting Details         rig Posting         riting Details         riting Documents         rich Committee         riking Criteria         ting Documents         rimary         rimary         Job Code       81069         Classification Type         Post Doctoral         Minimum         Experience//Education				
Summary	Position/Classification Title Post Doe	c Research Associate	<b></b>	lds from the appr	avad position
	Job Code 81069			ends from the appr	
	Classification Type Post Doc	ctoral	ae	scription will be co	spied in to your new
	Minimum Experience/Education		ро	sting.	

Position Overview			
Primary Purpose of Position Primary Function of Organizational Unit	Test	Position Overview and Continue to enter post any empty fields as ne	l Position Information: ting information into eded.
Position Information			
* Position Title	Post Doctoral Research Associate (TLB40)	)	
* Working Title		This field is required.	
Position Number	999999		Dominal fields will be
* JCAT	12345		highlighted in RED.
Approved Salary	\$40,000		
* Salary Range	Enter salary to be advertised amount or a d	This field is required.	ith education and experience"
* FLSA	Exempt		
* Appointment Type	Time Limited - Full-time		
* If Time Limited, Appointment Length	08/08/2014 Please indicate budget end date. If funded	from more than one fund indicate ear	rliest end date. This field cannot be left blank.
FTE			

You can indicate other users you would like to have **Supervisor** and / or **Applicant Reviewer** access to the posting by searching for their name in the Supervisor and Applicant Reviewer fields. Indicate the proposed **Open Date** and **Date Desired for Closing or Initial Review (minimum 30 days)**, which will define the number of days applicants can view and apply for the posting. The minimum allowable posting period for

Post Doctoral positions is thirty (30) calendar days, however, a Post Doctoral posting can be posted as open until filled. Select the appropriate **Fast Find** category for the posting to ensure it is included in the correct pre-defined search when an applicant clicks on the corresponding Fast Find button through the applicant portal. Choices are Administrators and Research, Faculty, Post Doctoral, Temporary Staff, and Staff:



Include details regarding any special advertising requests, such as posting the position on additional job posting websites or in specific print media outlets, in the **Advertising Summary** field. A link to the job posting on the North Carolina A&T State University applicant portal will be included in any special advertising. The **Pass Message** and **Fail Message** fields contain template notifications that will be sent to applicants who are screened out of the posting through **Supplemental Questions**. Once all fields on the Posting Details Tab are complete, click the Next button to save your changes and move to the next tab. You can also click the "Save" button if you wish to save your changes and keep working on the current tab:

	Advertising Summary		*			Includ adver inforn	le any special tising request nation.	t	
		Please list additional external advertising sources if different than s Standard sources include: NC Employment Security Commission &	tano & UN	lard adver IC Genera	rtising s al Admir	ources. nistration			
*	Pass Message	Thank you for your interest in this position. The screening and selection process is currently underway and will continue until a successful candidate is chosen. Should review of your qualifications result in a decision to pursue your candidacy, you will be contacted.	*		Te	mplate	e applicant e-	mail	
*	Fail Message	Thank you for your interest in this position. Based on your responses to the questions on the employment application, you do not meet the minimum qualifications for this position. Please do not let this discourage you from applying for other positions that interest you.	*						
		Save	an	d Nex	t but	tons.	Save	Next >>	

# <u>Create New Post Doctoral Posting from a Position Description – Position</u> <u>Funding Information Tab</u>

Funding Source information from the approved position description will copy over into the fields in the Funding Source Details section of this tab, and you can make edits as necessary. **PLEASE NOTE:** The annual amount budgeted must support the hiring range indicated on the Posting Details Tab.

If you are unsure of what fund to use, the most up to date information may be found in **Banner Finance** on these forms:

- 1) FTVORGN- Provides a list of Org Codes
- 2) FTVFUND- Provides a list of Funds
- 3) FTVACCT- Provides a list of Accounts

These forms show listings of all active funds. For additional help, refer to the Banner Training Guide.

If the position has more than one funding source, click on the **Add Funding Source Details Entry** button and **"Save"** until all sources have been entered. **PLEASE NOTE:** Each time you add an additional entry, you will need to **scroll down below the last saved entry** to enter a new funding source. Once all funding sources have been added, click Next>>> to move to the next tab:

Funding Source Details			
Indicate the funding source must equal the requested s	e(s) for this position. Click on "Add Funding Source salary.	Details Entry" to enter budget and other required codes. Select "SAVE" after each	n entry. Please note that the annual amount budgeted
If the position has more that below the last saved entry	an one funding source, continue to select "Add Fur to enter a new funding source.	nding Source Details Entry" and "Save" until all sources are entered. Each time you	add an additional entry, you will need to scroll down
State Appropriated * Funding / Non-State Appropriated Funding	State Appropriated Funding	Funding information	
If non-state, select source of funding	Please select	will be copied in from	
lf other, designate source		the approved position	
* Budget Code	16070 (State)	nding source, continue to select "Add Funding Source Details Entry" and "Save" until all sources are entered. Each time you add an additional entry, you will need to scroll down a new funding source. propriated Funding select select select select funding information will be copied in from the approved position description, which you can edit as necessary. 6 digit number ##### 5 digit number ###### 5 digit number ###### Click here to add a funding source. If the position has more than one funding	
* Fund	111111 Format: 6 digit number #######	can edit as necessary.	
• Org	11111 Format: 5 digit number ######		
* Account	11111 Format: 5 digit number ######		<b>IMPORANT NOTE:</b>
* Program	111 Format: 3 digit number ###		Remember to click "Save" after each
Date Funds End	Account       Image: Select and provided for the select and provided for t		
* Annual Amount	\$45,000	on "Add Funding Source Details Entry" to enter budget and other required codes. Select "SAVE" after each entry. Please note that the annual amount budgeted timue to select "Add Funding Source Details Entry" and "Save" until all sources are entered. Each time you add an additional entry, you will need to scroll down will be copied in from the approved position description, which you can edit as necessary. # Image: Click here to add a funding source. If the position has more than one funding source is entered. Click here to add a funding source. If the position has more than one funding source is entered.	
* Percentage of FTE	1.0	the position has more than one funding	t and other required codes. Select "SAVE" after each entry. Please note that the annual amount budgeted d "save" until all sources are entered. Each time you add an additional entry, you will need to scroll down rmation d in from d position which you ecessary.
Remove Entry?     Add Funding Source Details Entry	ntry	source, continue to click here until all	
		funding sources are entered.	Save << Prev Next>>

# <u>Create New EHRA Posting from a Position Description – Supplemental</u> <u>Questions Tab</u>

In the **Supplemental Questions** tab, you can identify screening questions related to an applicant's education and experience that must be answered as part of the application process. To add supplemental questions to your posting, click on the button labeled **"Add a Question"**. A pop up section will appear where you can add an existing question or submit a new one. Once done, click on the Next>>> button to save changes and proceed to the next tab:

Editing Posting	Supplemental Questions			Save <> Prev Next >
Posting Details	Adding New Posting Questions: Click on the b	outton labeled "Add a	a Question". A pop up section will appear where	you can add an existing
Position Funding Infor	question or create a new one.			
Supplemental Questions	Adding Existing Posting Questions: There are using the key word search or filter by guestion	two ways to search	for approved posting questions to add to the job	being posted. You can filter
Applicant Documents	Assign Points or Disgualifying Responses: Cli	ick on the question t	nat has been added and a drondown menu will a	nnear where points and
References	disqualifying responses can be associated to	the posting question		ppear where points and
Search Committee	Posting Question Options: Once questions ha	we been added to th	e posting, you will see a column of checkboxes t	to the left of each question;
Ranking Criteria	checking these boxes will make a question re-	quired.		
Posting Documents	Included Supplemental Questions		Click to add supplemental	Add a questi
Summary	Position Required Category	Question		Statu
	-		questions.	

Adding Existing Posting Questions: There are two ways to search for approved posting questions to add to the job being posted: by key word search or by question category. To add an existing question, click the check box next to the question you wish to add.

**Submitting New Posting Questions:** To submit a new question for review and approval, click on the button labeled "Add a Question". When the **Available Supplemental Questions** box opens, click on the **"Add a New One"** link in the bottom right hand corner.

	Add a	Question					×
L	Avai	ilable Suppl	lemental Que	stions			
Į.	Categ	gory: Any	Keyword	:			Filter supplemental questions by keyword or category.
	Add	Uncategorized	How did you hear	about this emplo	ovment opp	ortunity?	S
IS		Experience	statistical record keeping				
		Education	Do you have a hig	h school diplom	a or equival	ent?	
		Experience	Do you have HR e	experience?			
		Education	Do you have a Hig	gh School diplom	na?		V
		Education	Do you have a Ma	ster's Degree?			
		Education	Do you have a Ma	ster's Degree?			n
		Experience	How many years	of Accounting ex	perience do	you have in a higher	education setting?
		Education	Do you have a Hig	gh School diplom	na?	Click to submit a	a custom supplemental
		Experience	Do you have at lea	ast 4 years of ex	perience?	question for rev	iew and approval.
	Dipla	aying <b>all 10</b>					
С	lick ch	eck box to a	dd an		r	Can't find the on	e you want? Add a new one
e	xisting	g supplement	al question.		Click Su finishe	ubmit when d.	Submit Cancel

Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear where points and disqualifying responses can be associated to the posting question.

**Posting Question Options:** Once questions have been added to the posting, you will see a column of checkboxes to the left of each question; checking these boxes will make a question required.

Position	Required	Category	Question			Status	
1		Uncategorized	How did you hear about th	is employment opportunity?		active	
2		Experience	Do you have at least one y keeping experience?	rear of responsible payroll or financial and	statistical record	active	•
3		Education	Do you have a High Scho		٦	active	×
		Experience	How many years of Accou	Assign points to answers.	ucation setting?	active	×
			Possible Answers: Predef	ined Options	Disgualifying		
	Click to ma required.	ake questions	1. 0 years 2. 1-3 years 3. 4-5 years 4. 5+ years				
eorde	r auestion	s.		Click to assign disqualifying			

# <u>Create New Post Doctoral Posting from a Position Description –</u> <u>Applicant Documents Tab</u>

In the **Applicant Documents** tab, Applicant documents can be included in the application process by selecting **Included** to make the documents optional and **Required and Included** to make the document(s) mandatory to complete the application process. Documents attached by the applicant during the application process will be accessible for viewing during applicant review. Once done, click on the Next>>> button to save changes and proceed to the next tab:

diting Posting	Click Included to make uploading a document o	ptional.	Click <u>both</u> Included <u>and</u> Required to make uploading a document required.
Posting Details	Included to make the document(s) man	ro datory to complete t	ce he ap cation process.
Position Funding Infor	Order Name	Included?	Required?
Supplemental Questions		Included?	
Applicant Documents	1 Resume		
References			
Search Committee	2 Cover Letter		
Ranking Criteria			
Posting Documents	3 Curriculum Vitae		
Summary	4 Teaching Philosophy		
	5 Letter Of Reference 1		
	6 Letter Of Reference 2		
	7 Letter Of Reference 3		

## <u>Create New Post Doctoral Posting from a Position Description –</u> <u>References / Letters of Recommendation Tab</u>

In the **References / Letters of Recommendation** tab, you can indicate whether or not you wish to require applicants to submit references with their application. You can also indicate the minimum and maximum number of references you would like applicants to submit, and the cutoff date by which reference information must be submitted:

stings / Post Doctoral / Post Doctoral Re	search Associate (TLB40) (Draft) / Edit: References
Editing Posting	References Save << Prev Next
Posting Details	<sup>™</sup> Check spelling ▼
<ul> <li>Position Funding Infor</li> <li>Supplemental Questions</li> </ul>	Accept References: Please indicate whether or not you wish to require applicants to submit references with their application.
Applicant Documents	Minimum Requests: Please indicate the minimum number of references you would like applicants to submit.
Search Committee     Ranking Criteria	Cutoff Date: Please indicate the date by which reference information must be submitted. * Required Information
Posting Documents Summary	References     Indicate Yes or No.
eference nformation may ot be submitted	Minimum Requests Maximum Requests Cutoff Date
fter this date.	Save << Prev Next >

# <u>Create New Post Doctoral Posting from a Position Description – Search</u> <u>Committee Tab</u>

Search Committees are advisory in nature and serve the purpose of recruiting a qualified applicant pool, reviewing their credentials, and recommending acceptable candidates to the hiring manager. Search Committees can consist of University employees both internal and external to the hiring unit, as well as individuals external to the University who represent key stakeholders.

In the **Search Committee** tab, you can assign search committee members who will have access to review application information for a specific posting. Search committee members can view applications, applicant documents, and evaluate / rank applicants based upon ranking criteria you establish as part of the posting. Requests to add search committee members will be reviewed and approved by the Division of human Resources (DHR) once the posting request is routed to DHR for approval. Upon DHR approving a search committee member's access, the search committee member will receive an e-mail notification with instructions on how to access the online posting and related application information:

Editing Posting	Search Committee Save <- Prev Next >			
Posting Details	Search Committees are advisory in nature and serve the number of recruiting a qualified applicant pool, reviewing their credentials, and			
Position Funding Infor	recommending acceptable candidates to the hiring manager. Search Committees can consist of University employees both internal and externa to the hiring unit, as well as individuals external to the University who represent key stakeholders.			
Supplemental Questions				
Applicant Documents	Search Committee Members			
References/Letters of	No Search Committee Members have been assigned to this Posting yet.			
Search Committee				
Ranking Criteria	Search			
Posting Documents	Find a User to assign as a Search Committee Member.			
Summary				
	First Name			
	Last Name			
	Email Address To search for a pre-approved search			
	Search committee member, enter the name and			

After searching for a pre-approved search committee member, click on the **Add Member** button to add them to your search committee. You can also make a search committee member the chair of the search committee by clicking on the check box next to **"Make Member the Committee Chair"**:

Search Committee Memb	pers		
No Search Committee Members	s have been a	Click the check hox to assign the	
Search		search committee member as the committee chair.	
Find a User to assign as a Sear	ch Committee	e Memer.	
Name Email Address	Add Memb	er 🕂	
Lonnie Crotts emailaddress@zed.z	ed Add Mem	iber 🔲 Make Member The Committee Chair	
First Name Lonnie			
Last Name Crotts	Click th	e Add Member button to add	
Email Address	the sea searche	rch committee member you ed for.	
Search			

To create an account for a new search committee member, enter in the committee member's name, current e-mail address, and desired username, then click on the **Submit** button:

oose of serving as a Search Committee Member.	
a new Search Committee Member.	
To create an account for a new search committee member, complete	<< Prev Next >>
	To create an account for a new search committee member, complete

If the requested search committee member is already an assigned user of the PeopleAdmin system, their user account information will be displayed, and you can add them to your search committee by clicking on the **Add User** button:

Mat	tching User				
Username	ambraun				
First Name	Amy				
Last Name	Braun	Click the Add User button to add the new			
Email Droformed Crean	emailaddress@zed.zed	search committee member in a pending			
Preferred Group	<b>p</b> Employee				
Add User		approved by DHP			
Cloar Matching I	leore	approved by DRK.			
Clear Matching C	13613				
New Search C	committee Member				
Request that some	eone be granted access to th	ne system for the purpose of serving as a Search Committee Membe	r		
Required fields are	e indicated with an asterisk (	*).			
Account Informa	ation				
Please enter the	following information to cre	eate an account for a new Search Committee Member			
* First Nam	e Amy				
* Last Nam	e Braun				
* Email	ambraun@ncat.edu				
* Usernam	e ambraun				
Submit					
			Save	<< Prev	Next >>

# <u>Create New Post Doctoral Posting from a Position Description – Ranking</u> <u>Criteria Tab</u>

**Ranking Criteria** can be used by search committees during the applicant review process to rank applicants based upon job-related experience and education factors. This optional tool can be helpful in identifying the most qualified candidates in an applicant pool. Ranking criteria are not presented to the applicant:

Editing Posting	Ranking Criter	ia		Save << Prev Next	
<ul> <li>Posting Details</li> <li>Position Funding Infor</li> </ul>	Ranking Criteria can experience and edu criteria are not prese	n be used used by search comr cation factors. This optional too ented to the applicant.	nittees during the applicant review process to rank applic I can be helpful in identifying the most qualified candidat	ants based upon job-related es in an applicant pool. Ranking	
Supplemental Questions	Adding New Ranking Criteria: Click on the button labeled "Add a Criterion". A dialog box will appear where you can add an existing criterion by				
Applicant Documents	- checking the box in the "Add" column or submit a new one for approval.				
	O L STE N. D	L'ORIN TO LOR	and the second		
<ul> <li>Applicant Documents</li> <li>References/Letters of</li> </ul>	Submitting New Rar the Available Evalua	nking Criteria: To submit a new ative Criteria box opens, click o	ranking criterion for review and approval, click on the but n the "Add a new one" link in the bottom right hand corne	tton labeled "Add a Criterion". Whe er.	
<ul> <li>Applicant Documents</li> <li>References/Letters of</li> <li>Search Committee</li> </ul>	Submitting New Rar the Available Evalua Included Evaluative	nking Criteria: To submit a new ative Criteria box opens, click o e <b>Criteria</b>	ranking criterion for review and approval, click on the but n the "Add a new one" link in the bottom right hand corne	tton labeled "Add a Criterion". Whe er. Add a Criteri	
<ul> <li>Applicant Documents</li> <li>References/Letters of</li> <li>Search Committee</li> <li>Ranking Criteria</li> </ul>	Submitting New Rar the Available Evalua Included Evaluative Category	nking Criteria: To submit a new ative Criteria box opens, click o e Criteria Description	ranking criterion for review and approval, click on the but n the "Add a new one" link in the bottom right hand corne Click to add ranking crite	tton labeled "Add a Criterion". Whe r. Add a Criter Status	
<ul> <li>Applicant Documents</li> <li>References/Letters of</li> <li>Search Committee</li> <li>Ranking Criteria</li> <li>Posting Documents</li> </ul>	Submitting New Rar the Available Evalua Included Evaluative Category	nking Criteria: To submit a new ative Criteria box opens, click o e <b>Criteria</b> Description	ranking criterion for review and approval, click on the but n the "Add a new one" link in the bottom right hand corne Click to add ranking crite	tton labeled "Add a Criterion". Whe r. Add a Criteri Status	

To add ranking criteria, click on the button labeled **"Add a Criterion"**. A dialog box will appear where you can add an existing criterion by checking the box in the "Add" column or submit a new one for approval. To submit a new ranking criterion for review and approval, click on the button labeled **"Add a Criterion,"** then click on the **"Add a new one"** link in the bottom right hand corner of the dialog box that opens:

Add Category	Keyword:     Description		Search for ranking criteria b keyword or category.
Uncategorize	A Rank Experience - 5 is Possible Answers: 1. 1 2. 2 3. 3 4. 4 5. 5 Applicant workflow st	the highest Indicate the applic that allows an app tate Under Review by HR	cant workflow state plicant to be ranked.
Uncategorize	ed Please rate the candida	ites experience related to th	Click to submit a custom ranking

Editing Posting	Ranking Criter	ria	Click Save or Ne	vt to m		Save	e <<	Prev Ne
Posting Details	Ranking Criteria car	n be used used by search c			applicant	s based up	on job-i	related
Position Funding Infor	experience and edu criteria are not pres	ucation factors. This optiona ented to the applicant.	to the next tab.		didates i	n an applic	ant poo	I. Ranking
Supplemental Questions	Adding New Rankin	ng Criteria: Click on the butto	n labeled "Add a Criterion". A d	dialog box wi	Il appear where you	can add ar	n existin	g criterion
	checking the box in the "Add" column or submit a new one for approval.							
Applicant Documents	checking the box in							
<ul> <li>Applicant Documents</li> <li>References/Letters of</li> </ul>	Submitting New Rai the Available Evaluation	nking Criteria: To submit a ne ative Criteria box opens, click	ew ranking criterion for review a t on the "Add a new one" link ir	and approva n the bottom	I, click on the button right hand corner.	labeled "A	Add a Cr	riterion". W
<ul> <li>Applicant Documents</li> <li>References/Letters of</li> <li>Search Committee</li> </ul>	Submitting New Rai the Available Evaluativ	nking Criteria: To submit a ne ative Criteria box opens, click re Criteria	ew ranking criterion for review a c on the "Add a new one" link ir	and approva n the bottom	I, click on the button right hand corner.	labeled "A	Add a Cr	riterion". W Add a Crit
<ul> <li>Applicant Documents</li> <li>References/Letters of</li> <li>Search Committee</li> <li>Ranking Criteria</li> </ul>	Submitting New Rar the Available Evaluation Included Evaluation Category	nking Criteria: To submit a na ative Criteria box opens, click ve Criteria Description	ew ranking criterion for review c on the "Add a new one" link ir	and approva n the bottom Weight	I, click on the button right hand corner. Workflow State	labeled "A	Add a Cr	iterion". W
Applicant Documents References/Letters of Search Committee Ranking Criteria Posting Documents	Submitting New Rai the Available Evaluativ Included Evaluativ Category Uncategorized	nking Criteria: To submit a na ative Criteria box opens, click <b>re Criteria</b> Description Teaching experience in a u	ew ranking criterion for review : c on the "Add a new one" link ir	and approva n the bottom Weight	I, click on the button right hand corner. Workflow State Under Review by HR	Status active	Add a Cr	iterion". W
<ul> <li>Applicant Documents</li> <li>References/Letters of</li> <li>Search Committee</li> <li>Ranking Criteria</li> <li>Posting Documents</li> </ul>	Checking the box in Submitting New Rai the Available Evaluativ Included Evaluativ Category Uncategorized Uncategorized	nking Criteria: To submit a n ative Criteria box opens, click re Criteria Description Teaching experience in a u Please rate the candidates	ew ranking criterion for review : c on the "Add a new one" link ir niversity experience related to the job:	and approva n the bottom Weight	I, click on the button right hand corner. Workflow State Under Review by HR Under Review by HR	Status active active	Add a Cr	iterion". W

# <u>Create New Post Doctoral Posting from a Position Description – Posting</u> <u>Documents Tab</u>

The **Posting Documents Tab** allows you to upload documents as attachments that will route with the posting request through the approval workflow. Attachments can be uploaded as follows:

- **Upload New:** Choose this option if you want to upload a file from your computer.
- Create New: Choose this option if you want to create a new file to attach using the PeopleAdmin editor.
- Choose Existing: Choose this option if you want to attach a file that has already been uploaded 193 into PeopleAdmin as part of another action.

Excel and Word documents may be attached. PDF conversion must be completed for the document to be valid when applicable:

Editing Posting	Posting Documents	Save <> Prev Next >
Posting Details	To add a document to the posting, hover over the blue Action text link to the right of the d	document name.
Position Funding Infor	Documents can be uploaded by browsing for the document or a document can be written	n or previously selected. Document types that are
Supplemental Questions	supported as attachment include .doc, .docx, .pdf, .rff_ttx_txt_tiff_tif_ipeg_ipg_ipg_n	be will be and we have a second will be
Applicant Documents	PDF conversion must be completed for the docume Click "Actions", the	en select Upload New,
References/Letters of	Document Type Name Status (Actions) Create New, or Cho	oose Existing in order
Search Committee	Marketing Plan Actions to upload an attack	hment.
Ranking Criteria	Print Ad Text Upload New	
Posting Documents	Create New Choose Existing	Save <> Prev Next >
-	Complete this page	by clicking

# <u>Create New Post Doctoral Posting from a Position Description –</u> <u>Summary Tab</u>

The **Summary Tab** allows you to perform a final review all of the posting information you've entered on the previous tabs prior to sending the request to the next step in the approval workflow. Please review the details of the posting summary carefully before continuing.

The Blue Circle Check appears by those tabs for which all required information has been entered:

Postings	ostings / Post Doctoral / Post Doctoral Research Associate (TLB40) (Draft) / Summary							
	Posting: Post Doctoral Rese (Post Doctoral) Edit Current Status: Draft Position Type: Post Doctoral CO Section/Unit: VC for Human Resources	earch Associate (TLB40) Take Action On Positing						
	Summary History Settings	Hiring Proposals Associated Position Description						
	Please review the details of the post To take the action, select the approp you are ready to submit your posting To edit the posting, click on the Edit make necessary corrections before in Posting Details Edit Classification Information	ting carefully before continuing.						
BI	ue Circle Check	are incorrect, please make the appropriate classification selection using the "classification" rad on the left side menu while modifying the Position. Post Doc Research Associate 61069						
	Classification Type Minimum Experience/Education	Post Doctoral						

An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save"**, and then return to the **Summary Tab** by clicking on the link in the left column:

Position Funding Information Edit	Click "Edit" to make edits to a tab	
Budget Advisory Approval	Click Eult to make eults to a tab.	
Orange Circle EPA and SPA posi deration of the Com	tions that are funded in whole or in part by general state fun mittee's review process, state below what mission specific,	ds requires approval by A&T's Budget Advisory essential, and / or key objectives will not be met if the
Mission Specific, Essential and/or Key Objectives not Met without position		

Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on**"

**Pending Request**" button and selecting the appropriate routing action. In this example, the appropriate routing action is **"Send to Department Head (Move to Department Head)**":

NORTH CAROLINA A&T STATE UNIVERSITY		(Inbox) PeopleAdmin Watch List APPLICANT TRACKING
	Home Postings Hiring Proposals   My Profile	Нер
		Linc Butler, you have 0 messages. Supervisor 💽 C logout
Postings / Post Doctoral / Post Doctoral Research Associate (TLB)         Posting: Post Doctoral Research Associate (TLB)         (Post Doctoral)       Edit         Current Status: Draft         Position Type: Post Doctoral       Created by         Section/Unit: VC for Human       Owner: Lin         Resources       Summary         History       Settings	Click on "Take Action On Pending Request", then select approver to move the request to the next step in the approval workflow.	Take Action On Posting  WORKFLOW ACTIONS Keep working on this Posting Canceled (move to Canceled) Send to Department Head (move to Department Head)
Please review the details of the posting carefu To take the action, select the appropriate <b>Wor</b> and also add this posting to your <b>Watch List</b> . box.	lly before continuing. <b>kflow Action</b> by hovering over the orange "Take Action on this f n the popup box that appears. When you are ready to submit yo	Posting" button. You may add a Comment to the posting ur posting, click on the <b>Submit</b> button on the popup
To edit the posting, click on the <b>Edit</b> link next t an orange icon with an exclamation point, you	o the Section Name in the Summary Section. This will take yo will need to review this section and make necessary corrections	u directly to the <b>Posting Page</b> to <b>Edit</b> . If a section has before moving to the next step in the workflow.

You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send the action to the next level in the approval workflow, click the **"Submit"** button:



If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation:

"Fund" is required and All required fields must be set before transitioning.		$\otimes$
North Carolina Act State University	Watch List APPLICANT TRACKING	
Red bar indicating the required fields that	Linc Butler, you have 0 messages. Supervisor	logout
request to the next step in the workflow.	Take Action On Posting V	

Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

(	Posting was successfully transitioned			8
	ACT STATE UNIVERSITY	Watch List	APPLICANT TRACKING	
	Home Postings Hiring Proposals   My Profile Help			
	Linc Butler, you have 0 message	s. Supervisor	▼ C	logout
	Green confirmation bar indicating the Pending			
	Request was successfully transitioned and			
	added to your Watch List.			
	Current Status: Department Head	osting looks to A	Applicant	

The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

## <u>Create New Post Doctoral Posting from a Position Description - Saving</u> to Return to a Pending Request Later

On the **Summary Tab** is an important menu item which should be selected if you need to stop a work session on the posting before submitting it to the next level for approval. Following this step will ensure that all your work is saved when you open the request for completion.

- 1) Click the "Save" button located in either the top or bottom right corner
- 2) Select "Summary" from the Tab List (illustrated above)
- 3) Select "Keep Working on this Posting"

NORTH CAROLINA A&T STATE UNIVERSITY					Inbox Watch List	PeopleAdmin
	Home Posting	gs Hiring Proposals	My Profile	Help	Watch Eist	
				Linc Butler, you have 0 messages.	Supervisor	• C
stings / Post Doctoral / Post Doctoral Resear	ch Associate (TLB40) (Draft) / Summary					
Posting: Post Doctoral (Post Doctoral) Edit Current Status: Draft Position Type: Post Doctoral Section/Unit: VC for Human Resources	Research Associate (TLB4 Created by: Linc Butler Owner: Linc Butler	40)		Take Action On I WORKFLOW ACTI Keep working C Canceled (mov Send to Depart Department He	Posting v ONS on this Posting re to Canceled tment Head (n ead)	a d) nove to
Summary History Setting	gs Hiring Proposals Associated	d Position Description				
Please review the details of th	e posting carefully before continuing.					
To take the action, select the and also add this posting to yo box.	appropriate Workflow Action by how our Watch List. in the popup box that	ering over the orange "Ta appears. When you are	ke Action on this ready to submit y	Posting" button. You may add a vour posting, click on the <b>Submit</b>	Comment t button on th	to the posting the popup
To edit the posting, click on th an orange icon with an exclan	e Edit link next to the Section Name nation point, you will need to review th	in the Summary Section	<ol> <li>This will take y essary correction</li> </ol>	ou directly to the <b>Posting Page</b> as before moving to the next step	to <b>Edit</b> . If a so in the work	section has flow.

- 4) Add any Comments into the window that opens (below) as notes to yourself, if desired.
- 5) Click "Submit"

	L
ary	Take Action X
or (TLI	Keep working on this Posting
	Enter comments if desired.
utler	-
	Add this posting to your watch list?
Submit	when complete. Submit Cancel
iore cont	inuina

The **Posting** can be located when you log into the Applicant Tracking module again as the same **User Type** you used to begin the action. Hover your cursor over the **Postings tab** and click on "**EHRA**" You will then return to the **EHRA Postings view**, which provides a list of all postings based on your active user type, from which you can search for and select this posting and continue.

#### **Applicant Review**

**IMPORTANT NOTE:** Prior to beginning applicant review, you must switch your user type to **Applicant Reviewer**. If you do not have the Applicant Reviewer user type in your drop down menu, contact a <u>Recruitment Coordinator</u>. To view applicants who have applied to a posting, go to the **Postings** tab and click on the position type in the drop down list that matches the posting you wish to view: **SHRA**, **EHRA**, **or Post Doctoral**. Since the **Applicant Review** process is identical regardless of position type, we will be using an **SHRA** posting for the purpose of this User Guide. The only notable difference in how applications are routed is:

- Applications for SHRA postings route to DHR first for initial screening to ensure State minimum education and experience requirements are met prior to being routed to the hiring
- Applications for EHRA and Post Doctoral postinggeroute directly to the hiring manager and are not pre-screened by DHR.

North Carolina A&T State University				Inbox Watch List	PeopleAdmin Applicant tracking
In the Po click SHI current	ostings tab, RA to view / pending SHF	SPA EPA Post Doctoral	Active user type is Applicant Reviewer.	Applicant	Reviewer 💽 C logout
Displaying items for group "A	Applicant Reviewer".	s (10+) Special Handling Lists (0)	ystem	Shortcuts	
Job Title	Туре	Current State	Owner	Muliala	
				Useful Links Training Videos (Go here for helpful videos) the use of PA7.)	deos for staff trainin1997

You will then be taken to the **SHRA Postings** view, which provides a list of all current/pending SHRA postings initiated based on your active user type as follows:

Active User Type	Positions in Position Descriptions List
Supervisor	Current / pending postings for positions that are direct reports to the Supervisor only.
Department Head	Current / pending postings for all positions that report to the department the Department Head is assigned to.
Dean / Vice Chancellor	Current / pending postings for all positions within the School, College, or Division the Dean / Vice Chancellor is assigned to.

#### **Applicant Review – Postings View**

In the **SHRA Postings** view, you can search postings by any number of criteria, including but not limited to position title, posting number, position number, department name, supervisor name, or workflow state. Searches are fully customizable by position and posting attributes, and you can save custom searches for use again later:

NORTH CAROLINA A&T STATE UNIVERSITY						Inbox Peop Watch List APPL	IeAdmin CANT TRACKING ▼
stings / SPA SPA Postings		Home	Postings Hiring Proposals   My Prof	Active use Applicant I	r type is Reviewer.	Applicant Reviewe	C logo
Open Saved Search y Search:		Search Mor	e search options	arches are c	ustomizable	by	
List of current SHRA postings	/ pending by active		pc sa	osition attrib ved for later	utes and can ruse.	n be	Actions
List of current SHRA postings	/ pending by active per found)	Position Number	Department	osition attrib ved for later	outes and can r use.	Last Updated	Actions (Actions)
List of current SHRA postings	/ pending by active personal posting Number SPA048	Position Number TLB11	Department Employee Reliations	Active Applications	r use. Workflow State	Last Updated August 08, 2013 at 01:37 pm	Actions (Actions) Actions v
List of current SHRA postings Sur Search "Closed" (VI Working Title Employee Relations Counselor (TLB11) Employee Relations Counselor (TLB13)	/ pending by active personal sPA048 sPA045	Position Number TLB11 TLB13	Department Employee Relations Employee Relations	Active Applications	workflow State Closed	Last Updated August 06, 2013 at 01:37 pm August 06, 2013 at 10:30 am	Actions (Actions) Actions • Actions •
List of current SHRA postings Search. "Closed" 2/ Working Title Employee Relations Counselor (TLB13) Employee Relations Counselor (TLB13) Human Resources Special	/ pending by active ms Found) Posting Number SPA045 SPA045 SPA045	Position Number TLB11 TLB13 000066	Department Employee Relations Employee Relations Student & Foreign National Employment	Active Applications	vutes and can ruse. Vorkflow State Closed Closed	Last Updated August 08, 2013 at 01:37 pm August 08, 2013 at 01:37 pm August 08, 2013 at 05:25 am	Actions (Actions) Actions • Actions •
List of current SHRA postings	/ pending by active per- spada spada spada spada spada spada spada	Position Number TLB11 TLB13 000066 000051	Department Employee Relations Employee Relations Student & Foreign National Employment Classification & Compensation	Active Applications	Vorkflow State Closed Closed Closed	Last Updated August 08, 2013 at 01:37 pm August 08, 2013 at 01:37 pm August 08, 2013 at 00:52 am August 00, 2013 at 00:52 m	Actions (Actions) Actions • Actions • Actions •
List of current SHRA postings Sur Search: "Closed" (201 Working Title Employee Relations Counselor (TLB1) Employee Relations Counselor (TLB13) Human Resources Specialist Administrative Support Assoc Rescutatent Assistant - 1	/ pending by active percent sPaus sPaus sPaus sPaus sPaus sPaus	Position Number TLB11 TLB13 000066 000051 008	Department Employee Relations Employee Relations Student & Foreign National Employment Classification & Compensation Recuritment and Retention	Active Applications	Vutes and can ruse. Vorkflow State Closed Closed Closed Closed	Last Updated August 08, 2013 at 01.37 pm August 08, 2013 at 10.30 am August 09, 2013 at 09.52 am August 09, 2013 at 09.10 am August 00, 2013 at 09.10 am	Actions (Actions) Actions + Actions + Actions + Actions +
List of current SHRA postings Sat Search: "Closed" (2) Working Title Employee Relations Counselor (TLB1) Employee Relations Counselor (TLB1) Human Resources Specials Administrative Support Assoc Recutationed Assistant - 1 Human Resources Specials	/ pending by active spatial sp	Position Number TLB11 TLB13 000066 000051 008 LC0040	Department Employee Relations Student & Foreign Mational Employment Classification & Compensation Recruitment and Retention Recruitment and Retention	Active Applications	Vorkflow State Closed Closed Closed Closed Closed	Last Updated August 06, 2013 at 01:37 pm August 06, 2013 at 01:37 pm August 06, 2013 at 01:52 am August 06, 2013 at 05:52 am August 06, 2013 at 05:69 pm August 06, 2013 at 01:45 pm	Actions (Actions) Actions + Actions + Actions + Actions + Actions +
List of current SHRA postings	/ pending by active Petropy active SPA048 SPA048 SPA045 SPA012 SPA012 SPA014 SPA041 SPA039	Position Number TLB11 TLB13 000066 000051 008 LC0040 TLB11	Department Employee Relations Employee Relations Student & Foreign National Employment Classification & Compensation Recruitment and Retention Recruitment and Retention Employee Relations	Active Applications	Vorkflow State Closed Closed Closed Closed Closed Closed Closed Closed Closed	Last Updated August 60, 2013 at 01:37 pm August 60, 2013 at 01:37 pm August 60, 2013 at 00:52 am August 60, 2013 at 00:52 am August 60, 2013 at 00:61 am August 60, 2013 at 10:42 pm	Actions (Actions) Actions v Actions v Actions v Actions v Actions v Actions v
List of current SHRA postings SHRA postings Star Search: "Closed" (21) Working 116 Employee Relations Counselor (TLB1) Employee Relations Counselor (TLB1) Human Resources Specialist Administrative Support Assoc Recruitment Assistant-1 Human Resources Specialist Employee Relations Counselor (TLB1) Employee Relations Counselor (TLB1)	/ pending by active per- spads spads spads spads spads spads spads spads spads spads spads	Position Number TuB11 TuB13 000065 0000051 008 LC0040 TuB11 TuB10	Department Employee Relations Employee Relations Student & Foreign National Employment Classification & Compensation Recultment and Retention Recultment and Retention Employee Relations Employee Relations	Active Applications	Vorkflow State Closed Closed Closed Closed Closed Closed Closed Closed Closed	Last Updated August 08, 2013 at 01.37 pm August 08, 2013 at 01.37 pm August 08, 2013 at 0.52 am August 00, 2013 at 0.54 am August 00, 2013 at 0.56 pm August 00, 2013 at 01.45 pm August 00, 2013 at 01.45 pm August 05, 2013 at 02.58 pm	Actions (Actions) Actions • Actions • Actions • Actions • Actions • Actions • Actions •
List of current SHRA postings Sak Search: "Closed" 24 Working Title Employee Relations Counselor (TLB1) Human Resources Specialet Administrative Support Assoc Recultment Assistant - 1 Human Resources Specialet Employee Relations Counselor (TLB1) Employee Relations Counselor (TLB1) Employee Relations Counselor (TLB1) Employee Relations Counselor (TLB1) Employee Relations Counselor (TLB1)	/ pending by active spat	Position Number TLB11 TLB13 000056 000051 008 LC00040 TLB11 TLB10 TLB10 TLB19	Department Employee Relations Student & Foreign Mational Employment Classification & Compensation Recultiment and Retention Recultiment and Retention Employee Relations Employee Relations	Active Applications	Vorkflow State Closed Closed Closed Closed Closed Closed Closed Closed Closed Closed	Last Updated August 06, 2013 at 01:37 pm August 06, 2013 at 01:37 pm August 06, 2013 at 05:52 am August 06, 2013 at 05:52 am August 06, 2013 at 05:62 pm August 06, 2013 at 01:45 pm August 06, 2013 at 01:45 pm August 05, 2013 at 02:58 pm	Actions (Actions) Actions + Actions + Actions + Actions + Actions + Actions + Actions + Actions +
List of current SHRA postings SBU Search "Closed" (2) Working Titl Employee Relations Counselor (TLB1) Human Resources Specialist Administrative Support Assoc Recrutiment Assistant - 1 Human Resources Specialist Employee Relations Counselor (TLB1) Employee Relations Counselor (TLB1)	/ pending by active SPA048 SPA045 SPA045 SPA012 SPA012 SPA027 SPA027 SPA024 SPA014 SPA039 SPA039 SPA039 SPA035	Position Number TLB11 TLB13 000066 000051 008 LC0040 TLB11 TLB10 TLB9 TLB8	Department Employee Relations Employee Relations Classification & Compensation Recruitment and Retention Recruitment and Retention Employee Relations Employee Relations Employee Relations Employee Relations	Active Applications	Vorkflow State Closed Closed Closed Closed Closed Closed Closed Closed Closed Closed Closed Closed	Last Updated August 00, 2013 at 01:37 pm August 00, 2013 at 01:37 pm August 00, 2013 at 00:52 pm August 00, 2013 at 00:52 pm August 00, 2013 at 00:10 pm August 00, 2013 at 00:45 pm August 00, 2013 at 00:45 pm August 00, 2013 at 00:258 pm August 00, 2013 at 00:258 pm August 00, 2013 at 00:258 pm August 00, 2013 at 00:30 pm	Actions (Actions) Actions + Actions + Actions + Actions + Actions + Actions + Actions + Actions + Actions +

You can also view the workflow state of current / pending postings and see how many active applicants have applied to each posting:

North Carolina A&T State University						Inbox Peop Watch List APPL	IeAdmin ICANT TRACKING
		Home	Postings Hiring Proposals   My Profi	le Help			
					Linc Butler,	you have 0 messages. Applicant Reviewe	r 🔹 Ç
ostings / SPA							
SPA Postings							
Open Saved Search • Search:		Number o have app	of active applicants lied to each posting	that g.	Current w each post	vorkflow state o ing.	f
Ad hoc Search Closed	8			T			
<ul> <li>Saved Search: "Closed" (21 Items</li> <li>Working Title</li> </ul>	Found)	Position Number	Department	Active Applications	Workflow State	Last Undated	(Actions)
Employee Relations Counselor (TLB11)	SPA048	TLB11	Employee Relations	10	Closed	August 08, 2013 at 01:37 pm	Actions
Employee Relations Counselor (TLB13)	SPA045	TLB13	Employee Relations	1	Closed	August 08, 2013 at 10:30 am	Actions
Human Resources Specialist	SPA012	000066	Student & Foreign National Employment	0	Closed	August 08, 2013 at 09:52 am	Actions
Administrative Support Assoc	SPA027	000051	Classification & Compensation	1	Closed	August 08, 2013 at 09:10 am	Actions v
Recruitment Assistant - 1	SPA044	008	Recruitment and Retention	1	Closed	August 07, 2013 at 05:06 pm	Actions
Illumon Deseurose Consistist	SPA041	LC0040	Recruitment and Retention	3	Closed	August 06, 2013 at 01:45 pm	Actions

Once you identify the posting you would like to begin reviewing applicants for, go to the **Actions** button in the far right-hand column and select **"View Applicants"**:

Closed									
Ad hoc Search (2 Items Found) Save this search?									
Posting Number	Position Number	Department	Active Applications	Workflow State	Last Updated	(Actions)			
SPA039	TLB11	Employee Relations	1	Closed	August 06, 2013 at 10:42 am	Actionsv			
SPA048	TLB11	Employee Relations	10	Closed	August 08, 2013 at 01:37 pm GENERAL	Actions			
					View Posti View Appli TRACKING Stop Wate	ing icants			
	Closed Cound) Save this se Posting Number SPA039 SPA048	Closed Cound) Save this search?  Posting Position Number SPA039 TLB11 SPA048 TLB11	Closed         Cound)       Save this search?         Posting Number       Position Number       Department         SPA039       TLB11       Employee Relations         SPA048       TLB11       Employee Relations	Closed         Posting Number       Position Number       Active Applications         SPA039       TLB11       Employee Relations       1         SPA048       TLB11       Employee Relations       10	Closed         Posting Number       Position Number       Active Applications       Workflow State         SPA039       TLB11       Employee Relations       1       Closed         SPA048       TLB11       Employee Relations       10       Closed	Closed         Posting Number       Position       Department       Active Applications       Workflow State       Last Updated         SPA039       TLB11       Employee Relations       1       Closed       August 06, 2013 at 10:42 am         SPA048       TLB11       Employee Relations       10       Closed       August 08, 2013 at 10:37 pm         GENERAL       View Appli       Tune Active Relations       10       Closed       Pm         View Appli       Tracking Stop Wate       Stop Wate       Stop Wate       Stop Wate       Stop Wate			

#### **Applicant Review – Applicants Tab**

You will then be taken to the **Applicants** tab of the posting where you will see a list of all the applicants who have applied to the posting. In this view, you can search for applicants by keyword, and searches can be customized and saved for later use. You can also access any attached applicant documents by clicking on the document you wish to view in the **Documents** column. To view an applicant's application information, click on the name of an applicant.

	nployee Relations C	ounselor (TLB11) (Closed	I) / Applicant Review						
Postin (SPA) Current St Position Tj Section/Ur	g: Employed latus: Closed /pe: SPA lift: Employee Relat	Created by Created by Owner: Re	Inselor (TLB11 /: Linc Butler ccruitment	)			★ See how Posting I A Print Preview Print Preview	looks to Applicant plicant View)	
Summary	History	Applicants Repo	rts Hiring Propos	als Associated Position Description					
ist of a	all appl	icants bv	name						
click	to view	applicati	ion	Search More search options	Search appl	icants	View attac	hed	
ntorm	ation.				by keyword		applicant d	locume	ents.
Activ									
Actionsphile	ants	0							
e eved	ants I Search: <b>"Activ</b>	Applicants" (10 I	tems Found)						Actions
First Name	ants I Search: "Activ Last Name	Applicants" (10 I Workflow State (Internal)	tems Found) Last Updated	Are you a layoff candidate with the State of N.C. eligible for RIF priority reemployment consideration as described by GS 126?	Are you currently employed by the state of North Carolina?	Do you wish to claim veteran's preferance?	Are you a veteran or spouse of a disabled veteran?	Documents	Actions (Actions)
First Name	I Search: <b>"Activ</b> Last Name Split	Workflow     State (Internal)     Under Review by     Dept/Committee	Last Updated August 08, 2013 at 01:32 pm	Are you a layoff candidate with the State of N.C. eligible for RIF priority reemployment consideration as described by GS 1267	Are you currently employed by the state of North Carolina? No	Do you wish to claim veteran's preferance?	Are you a veteran or spouse of a disabled veteran?	Documents Resume	Actions (Actions) Actions •
First Name Lickety	I Search: <b>"Activ</b> Last Name Split Smith	Workflow State (Internal) Under Review by Dept/Committee Under Review by Dept/Committee	Lems Found) Last Updated August 08, 2013 at 01:32 pm August 08, 2013 at 01:32 pm	Are you a layoff candidate with the State of N.C. eligible for RIF priority reemployment consideration as described by GS 1267	Are you currently employed by the state of North Carolina? No No	Do you wish to claim veteran's preferance?	Are you a veteran or spouse of a disabled veteran?	Documents Resume	Actions (Actions) Actions • Actions •
First Name Lickety Gabbie	I Search: "Activ Last Name Split Smith Union	Workflow     State (Internal)     Under Review by     Dept/Committee     Under Review by     Dept/Committee     Under Review by     Dept/Committee	Lems Found) Last Updated August 08, 2013 al 01:32 pm August 08, 2013 al 01:32 pm August 08, 2013 al 01:32 pm	Are you a layoff candidate with the Slate of N.C. eligible for RIF priority reemployment consideration as described by GS 1267	Are you currently employed by the state of North Carolina? No No No	Do you wish to claim veteran's preferance?	Are you a veteran or spouse of a disabled veteran?	Documents Resume	Actions (Actions) Actions • Actions •
First Name     Lickety     Gabbie     Lola	ants I Search: "Activ Last Name Split Smith Union Fairweather	Workflow     State (Internal)     Under Review by     Dept/Committee     Under Review by     Dept/Committee     Under Review by     Dept/Committee     Under Review by     Dept/Committee     Under Review by	Lems Found) Last Updated August 08, 2013 at 01:32 pm August 08, 2013 at 01:32 pm August 08, 2013 at 01:32 pm August 08, 2013 at 01:32 pm	Are you a layoff candidate with the State of N.C. eligible for RIF priority reemployment consideration as described by GS 1267	Are you currently employed by the state of North Carolina? No No No No	Do you wish to claim veteran's preferance?	Are you a veteran or spouse of a disabled veteran?	Documents Resume	Actions (Actions) Actions • Actions • Actions •

When you click on the name of an applicant, you will be taken to the **Job Application** view, where you can view all submitted information the applicant has provided, including personal information, educational history, employment history, reference information, answers to supplemental questions, and attached applicant documents. You can also view the posting the applicant applied to, preview the application, and evaluate the applicant by clicking on the links located in the top right-hand corner just below the orange **Take Action On Job Application** button. :

Postings	1 1 Employee Relations Counselor (TLB1	1) (Closed) / Applicant Review / B	Pruce Campbell Under Review by Dept/Committee			Search Results: Previous   Next
	Job application: Bruce Campbell (SPA) Current Status: Under Review by Dept/Committee Application form: Application		Applicant name and workflow status.		Take Action on Job Application button	Take Action On Job Application ▼
	Full name: Bruce Campbell Address: 107 Elm St. Greensboro , NC United States of America	Created by: Bruce Campbell Owner: Applicant Reviewer		J		Evaluate Applicant
	Username: bcampbell Email: tblate@sediad Phone (Pirmary): 336-336 Phone (Secondary): 336-8356 Phone (Secondary): 336-8356 Phone (Secondary): 336-8356 Phone (Secondary): 336-8356 Section/Unit: Employee Relations Summary Recommendations (0 of 2) © Personal Information	) History Reports				Click to View Posting Applied To, Preview Application, or Evaluate Applicant.
	Contact Information			Scr	oll to view all	
	First Name Middle Name (enter NMN if no	Bruce		an	dication information	
	middle name)	Campbell				•
	Suffix					
	Last 4 Digits of Social Security Number	5555				
	Address1	107 Elm St.				
	Address2					

At the bottom of the **Job Application** view, you can view attached applicant documents. You can also view the application as a pdf, or view the application and all attached applicant documents as one pdf:

Required Documents		Any required a			
No required documents add	led.				
Optional Documents		Any optional ap			
Document Type Na	ime				
Resume Re	esume 07-23-13 12:38	:42 (21.7 KB)	PDF complete		
Cover Letter -					
Curriculum Vitae -			-		
Recommendation Docum	ients				
No recommendations subm	itted.				
PDF Documents					
Document Type	4				
Application		Click to view as	a pdf.	Recreate PDF	
Application and attached docur	ments		•	Recreate PDF	

### Applicant Review – Changing the Workflow State for an Applicant

To change the workflow state of an applicant, click on the orange **Take Action On Job Application** button and select the most appropriate action. Changing an applicant's workflow state to **"Interview (move to Interview)"** will also update their status in the list of applicants on the **Applicants** tab:

ostings / / Employee Relations Counselor (	TLB11) (Closed) / Applicant Review / B	Pruce Campbell Under Review by Dept/Committee	Search Results: Previous   Ne
Full name: Bruce Campbell Address: 107 Elm St. Greensboro, NC United States of America	Campbell (SPA) #Committee Created by: Bruce Campbell Owner: Applicant Reviewer	Change the workflow state of an applicant by selecting the most appropriate action in this list.	Take Action On Job Application v         WORKFLOW ACTIONS         Keep working on this Job application         Not Selected for Interview (move to Not Selected for Interview)         Select to Interview (move to Interview)
Username: bcampbell Email: tlbutler@zed.zed Phone (Primary): 336-336-3336 Phone (Secondary): 336-285-2222 Position Type: SPA Section/Unit: Employee Relations			

If you change an applicant's workflow state to **"Not Selected for Interview (move to Not Selected for Interview)"**, you will be <u>required</u> to select the most appropriate non-selection reason for that applicant. Once an applicant's workflow status is changed to **"Not Selected for Interview (move to Not Selected for Interview)"**, the applicant is moved to an inactive status and their name will be removed from the applicant list on the **Applicants** tab:

Take Action	Revi	ake Action 🗙	
Not Selected for Interview (move to Not Selected for Interview)	Not Not Rea	t Selected for Interview (move to t Selected for Interview) ason (required)	Take Action On Job Applic
	Ple	ase select	Preview Application
Reason (required)	npbe Pice iewer Av. Av. Ba- Ex; Ed Ed Re Re Re Pri	Jate select aliability - Unable to contact. aliability - Withdrew from consideration. aliability - Accepted other employment. ckground Check - Candidate did not pass c perience - Does not meet experience and/c perience - Sufficient Experience but less th ucation - Does not meet educational requir ucation - Could perform duties only with ex ferences - Reference information indicates ferences - Reference information indicates ferences - References not compatible with , ferences - References not compatible with a ferences - Reference and compatible with ,	riminal background check process. work history. an selected candidate. ements of the position. ctensive training and orientation period. insufficient education and/or work experien- unacceptable work history. job duties yoff priority.

# Applicant Review – Changing the Workflow States for a Group of Applicants

To change the workflow state for a group of applicants at the same time, go to the **Applicants** tab of the posting and click the Select All check box to select all applicants in the applicant list. Then hover your cursor over the **Actions** button and select **"Move in Workflow"**.

Se	elect Al	l check	box. plicants	s" (10 Items	Found)		Act	ions drop dov	wn	Actions
	First Name	Last Name	Workflow State (Internal)	Last Updated	Are you a layoff candidate with the State of N.C. eligible for RIF priority reemployment consideration as described by GS 126?	Are you currently e the state of Carolina?	me mployed by North	nu. wish to claim veteran's preferance?	a veteran or of a disabled veteran?	GENERAL Evaluate Applicants Download Applicants Evaluations
<b>V</b>	Lickety	Split	Under Review by Dept/Committee	August 08, 2013 at 01:32 pm		No				Review Screening Question Answers Download Screening Question Answers
	John	Smith	Under Review by Dept/Committee	August 08, 2013 at 01:32 pm		No		Aove in	1	Export results BULK Move in Workflow
V	Gabbie	Union	Under Review by Dept/Committee	August 08, 2013 at 01:32 pm		No	Workf	low.		Download Applications as PDF Create Document PDF per
V	Lola	Fairweather	Under Review by Dept/Committee	August 08, 2013 at 01:32 pm		No				Applicant
V	Bruce	Campbell	Under Review by Dept/Committee	August 08, 2013 at 01:32 pm		No		No	No	Actions▼ Resume
<b>V</b>	Beyonce Knowles	Knowles	Under Review by Dept/Committee	August 08, 2013 at 01:32 pm		Yes				Actions▼

First select the appropriate workflow state for the group of applicants in the **"Change for all Applicants"** drop down menu. Changing an applicant's workflow state to **"Interview (move to Interview)"** will also update their status in the list of applicants on the **Applicants** tab:

Postings / / Em	nployee Relations Counselor (TLB11) / Applican	t Review / Bulk Workflow Status Change		
	Editing: Workflow States for 8 Ap	oplicants		
		Change for all applicants	Select a workflow state Select a workflow state Not Selected for Interview	Select appropriate workflow state.
	Applicant	Current State	Interview	Reason
	Lickety Split	Under Review by Dept/Committee	Select a workflow state	🔻
	John Smith	Under Review by Dept/Committee	Select a workflow state	<b>T</b>
	Gabbie Union	Under Review by Dept/Committee	Select a workflow state	🔽
	Lola Fairweather	Under Review by Dept/Committee	Select a workflow state	a 💌
	Bruce Campbell	Under Review by Dept/Committee	Select a workflow state	💌
	Beyonce Knowles Knowles	Under Review by Dept/Committee	Select a workflow state	<b>T</b>
	Katherine Jackson	Under Review by Dept/Committee	Select a workflow state	💌
	Diana Ross	Under Review by Dept/Committee	Select a workflow state	a 💌
	Save changes Or Cancel			

If you change the applicant group's workflow state to **"Not Selected for Interview (move to Not Selected for Interview)"**, you will then be <u>required</u> to select the most appropriate non-selection reason for the applicant group. Once an applicant's workflow status is changed to **"Not Selected for Interview (move to Not Selected for Interview)"**, the applicant is moved to an inactive status and their name will be removed from the applicant list on the **Applicants** tab:

Postings / / E	mployee Relations	Counselor (TLB11) / A	Applicant Review / Bulk Workflow 9	Status Change		
5	Editing: Wo	rkflow States for	r 8 Applicants		Select the appropriate non-selection reason for the applicant group.	
	Change	for all applicants	Not Selected for Interview	Please select Please select Availability - Unabl	e to contact.	
	Applicant Current State		New State	Availability - Withdu Availability - Accep	rew from consideration. ted other employment.	
	Lickety Split	Under Review by Dept/Committee	Not Selected for Interview	Background Check Experience - Applic Experience - Does	- Candidate did not pass criminal background check process. ation shows unacceptable work history. not meet experience and/or competency requirements of the position.	•
	John Smith	Under Review by Dept/Committee	Not Selected for Interview	Experience - Suffic Education - Does n Education - Could	lent Experience but less than selected candidate. lot meet educational requirements of the position. perform duties only with extensive training and orientation period. areas information indicates insufficient education and/or work experience	•
	Gabbie Union	Under Review by Dept/Committee	Not Selected for Interview	References - Refer References - Unab	ence information indicates insolncent euclator and/or work experience ence information indicates unacceptable work history. le to contact. ances not compatible with ich duties	•
	Lola Fairweather	Under Review by Dept/Committee	Not Selected for Interview	Priority Selection -	Selected candidate with layoff priority.	
	Bruce Campbell	Under Review by Dept/Committee	Not Selected for Interview	Please select		•
	Beyonce Knowles Knowles	Under Review by Dept/Committee	Not Selected for Interview	Please select		•

Editing: Workflow S	states for 8 Applicants	Workflow state is updated for a	and non-selection reason Il applicants in the group.	
Change for a	Il applicants Not Selected for	Intervie	Sufficent Experience but less than selected candidate.	
Applicant	Current State	New State	Reason	
Lickety Split	Under Review by Dept/Committee	Not Selected for Interview	Experience - Sufficient Experience but less than selected candidate.	
John Smith	Under Review by Dept/Committee	Not Selected for Interview	Experience - Sufficient Experience but less than selected candidate.	•
Gabbie Union	Under Review by Dept/Committee	Not Selected for Interview	Experience - Sufficient Experience but less than selected candidate.	•
Lola Fairweather	Under Review by Dept/Committee	Not Selected for Interview	Experience - Sufficient Experience but less than selected candidate.	•
Bruce Campbell	Under Review by Dept/Committee	Not Selected for Interview	Experience - Sufficient Experience but less than selected candidate.	
Beyonce Knowles Knowles	Under Review by Dept/Committee	Not Selected for Interview	Experience - Sufficient Experience but less than selected candidate.	
Katherine Jackson	Under Review by Dept/Committee	Not Selected for Interview	Experience - Sufficient Experience but less than selected candidate.	•
Diana Ross	Under Review by Dept/Committee	Not Selected for Interview	Experience - Sufficient Experience but less than selected candidate.	•
Save changes Or Can	cel			

You can also make changes to individual applicants in the list by clicking on the drop down list in the **New** State column and selecting the appropriate workflow state. When finished making updates, click the Save **Changes** button located on the bottom left-hand corner of the page:

	Editing: Workflow S	States for 8	Applicants			
	Change for a	ll applicants	Not Selected for In	terview 💌 Experience -	Sufficient Experience but less than selected candidate.	
	Applicant	Current Sta	ate	New State	Reason	
	Lickety Split	Under Revi	ew by	Not Selected for Interview	Experience - Sufficient Experience but less than selected candidate.	
Cl in st	lick to change Idividual workf tates.	flow	v by v by tee v by tee v by tee	Interview Select a workflow state Not Selected for Interview Interview Not Selected for Interview Not Selected for Interview Interview Interview	Experience - Sufficient Experience but less than selected candidate. Experience - Sufficient Experience but less than selected candidate. Experience - Sufficient Experience but less than selected candidate.	Y
	Diana Ross	Under Revi Dept/Comm	ew by hittee	Not Selected for Interview	Experience - Sufficient Experience but less than selected candidate.	•
	Save changes			e changes.		

#### Applicant Review – Routing your Selected Candidate for Approval

Once you have completed interviews, checked references, and identified a selected candidate, you can then route your selected candidate through the candidate approval workflow within your School, College, or Division to the EEO Approval workflow state. You must first change the workflow state of all nonselected applicants from the workflow state of "Interview" to the workflow state of "Interviewed, Not Hired (move to Interviewed, Not Hired)". To do this, hover your cursor over the Take Action On Job Application button located in the top right-hand corner of the non-selected applicant's Job Application view and select "Interviewed, Not Hired (move to Interviewed, Not Hired)". You will then be required to select the most appropriate non-selection reason for that applicant. Once an applicant's workflow status is changed to "Not Selected for Interview (move to Not Selected for Interview)", the applicant is moved to an inactive status and their name will be removed from the applicant list on the Applicants tab: 203

Click na	me to v	view appl	ication.					Actions
🗆 ı t Name	Last Name	Workflow State (Internal)	Are you a layoff candidate with the State of N.C. eligible for RIF priority reemployment consideration as described by GS 126?	Are you currently employed by the state of North Carolina?	Do you wish to claim veteran's preferance?	Are you a veteran or spouse of a disabled veteran?	Documents	(Actions)
D (John	Smith	Interview	Remaining	No				Actions <b>v</b>
Bruce	Campbell	Interview	Augus applicants are in pm the workflow	No	No	No	Resume	Actions •
Katherine	Jackson		state of Interview.	No				Actions •



		reason is		Interviewed, Not Hired)		
Reason (re	equired)	required.		Reason (required)	🚖 View Posting Ap	oplied To
Please sele	ct III Submit	Cancel	th iewe	Please select Please select Declined Offer - Other employmer Declined Offer - Salary. Interview - Interview showed inco Interview - Interview showed lack Interview - Interview showed lack Interview - Interview showed lack Interview - Interview showed lack Interview - No show. Priority Selection - Selected candid	t. ied. nsistency with application information. of effective communication skills. of sufficient directly related experience and/or ed of understanding of scope of position's duties. date with promotional priority.	lucation.

You can then route the selected candidate to the next step in the candidate approval workflow by hovering your cursor over the **Take Action On Job Application** button located in the top right-hand corner of the selected candidate's Job Application view and selecting the appropriate next step. In this example, the next step in the workflow is **Send to Dean / Vice Chancellor.** You will then be required to enter comments describing why the selected candidate was the most qualified candidate in the applicant pool:



vi	Take Action	×	Revi	Take Action		
Ì	Send to Dean/Vice Chanc to Dean/Vice Chancellor)	cellor (move		Send to Dean/Vice Chancellor (move to Dean/Vice Chancellor) Reason (required)		
	Reason (required)	Selection	pbe	Enter Comments		
	Please select	reasons are required.	reasons are required.	Explanation:		
ver			1	Ţ		
L	Submit	Cancel		Submit Cancel		

Once the selected candidate has been approved by all levels of your School, College, or Division, the next step in the workflow is to route the selected candidate to DHR for **EEO Review** by the Director of Employee Relations and Affirmative Action Officer:

Posting	gs / / Employee Relations Counselor (1	LB11) (Closed) / Applicant Review / Bruce	Campbell Dean/Vice Chancellor		
	Job application: Bruce C Current Status: Dean/Vice Chancellor Application form: Application Full name: Bruce Campbell Address: 107 Elm St. Greensboro , NC United States of America Username: bcampbell Email: tlbutler@zed.zed Phone (Primary): 336-3336 Phone (Secondary): 336-285-2222 Position Type: SPA Section/Unit: Employee Relations	Created by: Bruce Campbell Owner: Dean/Vice Chancellor		Take Action On Job Application V WORKFLOW ACTIONS Keep working on this Job application Return to Interview (move to Interview) Interviewed, Not Hired (move to Interviewed, Not Hired) Send to EEO Review)	



#### **Hiring Proposal**

Once you have been notified that your selected candidate has been moved to the workflow state of **Recommended for Hire** by the Director of Employee Relations and Affirmative Action Officer, you can then start a Hiring Proposal by navigating to the Job Application view for that selected candidate and clicking on the **Start Hiring Proposal** link located on the top right-hand corner of the page:

Postings / / Employe	ee Relations Counselor (TLI	B11) (Closed) / Applicant Review / Bruce	e Campbell Recommend for Hire		
Job appli Current Status Application fo	cation: Bruce Ca s: Recommend for Hire rm: Application	ampbell (SPA)	_	*	View Posting Applied To
Full name: Brue	ce Campbell	Created by: Bruce Campbell			Evaluate Applicant
Address: 107 Elm St.		Owner: Applicant Reviewer			Start Hiring Proposal
Greensboro , I United States	NC of America				our rinning ropodu
Username: bca	ampbell				
Email: tlbutler( Phone (Primary	@zed.zed v): 336-336-3336				
Phone (Second	dary): 336-285-2222				
Position Type: Section/Unit: E	SPA mployee Relations				

Then select the position description you would like to hire the selected candidate into from the list displayed on the Selected Position Description page. You can search for the desired position description by keyword or position attributes including but limited to position title, position number, and position status:

Postings / / Applicant Review / Bruce /	Campbell (Recommend for Hire	) / New Hiring Proposal						
Selected Position Descriptio	n							
<ul> <li>Accounting Manager</li> </ul>								
Position Descriptions								
Open Saved Search •     Search:     Search More search options       SPA Position Descriptions     Image: Comparison option o					bire the position bire the select ate into by key	cted yword.		
Working Position Title	Position Number	Employee First Name	Employee Last Name	Position/Classification Title	Department	Supervisor	Status	(Actions)
Administrative Support Spec	000018	Belinda	Macklin	Administrative Support Spec	HR Systems	Asst VC-Human Resources (Linc Butler)	Active	Actions
O Human Resources Specialist	000025	Ester	Jones	Human Resources Specialist	Benefits	Human Resources Consultant (Nanita Cole)	Active	Actions
Human Resources Consultant	000033	Nanita	Cole	Human Resources Consultant	Benefits	Asst VC-Human Resources (Linc Butler)	Active	Actions
Human Resources Specialist	LC0040	Lonnie	Crotts	Human Resources Consultant	Recruitment and Retention	Asst VC-Human Resources (Linc Butler)	Active	Actions
Human Resources Consultant	000051	Amy	Braun	Human Resources Consultant	Classification & Compensation	Asst VC-Human Resources (Linc Butler)	Active	Actions •
O Human Resources Consultant	000057	Courtney	Carey	Human Resources Consultant	Temporary Employment	Human Resources Consultant (Tammie Hill)	Active	Actions

When you locate the desired position description, select it by clicking the radio button to the left of the **Working Position Title**, then click the **Select Position Description** button located on the bottom left-hand corner of the page:

Postings / / Applicant Review / Bruce Campbell (Recommend for Hire) / New Hiring Proposal									
Selected Position Description									
Accounting Manager									
Position Description	IS								
Search: TLB11     Search More search options       SPA Position Descriptions       Ad hoc Search									
Working Position Title	Position Number	Employee First Name	Employe Last Na	ne Position/Classific	ation Title	Department	Supervisor	Status	(Actions)
© Employee Relations Counselor (TLB11)	TLB11	Then click he	re.	Human Resources	Specialist	Employee Relations	Asst VC-Human Resources (Linc Butler)	Active	Actions
Select Position Description			10.						

## Hiring Proposal – Hiring Proposal Tab

You will then be taken to the **Edit Hiring Proposal** view and can begin completing all required fields on the **Hiring Proposal** Tab. Information from the selected candidate's application, the posting, and the position description will be copied into the **Hiring Proposal** tab. Once all required fields are complete, click **Save** or **Next**:

Editing Hiring Proposal	Hiring Proposal		Sa	ve and Next but	tons.		Save Novtax
Liring Proposal	Fining Proposal				-		Save Next>>
Hiring Proposal Summary	Check spelling						
Thing Toposal Summary	* Required Information						
	Candidate Information						•
	First Name	Bruce		The Selected (	`andida	to's	
	Middle Name	Ashley		application in	anulua formati	on on	
	Last Name	Campbell		application in	im	on	
	Primary Phone	336-336-3336		will be copied	m.		
	Email	tlbutler@zed.zed					-
	Social Security Number	5555					
	Date Of Birth	09/10/1971					
Position Information							
Positon Title	Employee Relations Cou	unselor (TLB11)	Positio	n description		7	
Posting Number	SPA048		inform	ation will be cop	oied in.		
Classification Type	SPA						
Approved Competency Level	Journey						
Primary Purpose of Position	Test						
Approved Salary	\$45,000						
Has the University's EEO Policy been followed in the recommendation of applicants for this position and documentary evidence to support this decision been filed with the Division of Human Resources?	This field is required.		Require	ed field.			
Is this position assigned to the Department of Athletics or involved or associated with athletics, including but not limited to, responsibility for admission, certification of academic standing, evaluation of academic performance and administration of financial aid for student otherea?	No						

Funding Source Detail									
Indicate the funding source(s) for this position. Click on "Add Funding Source Details Entry" to enter budget and other required codes. Select "SAVE" after each entry. Please note that the annual amount budgeted must equal the requested salary.									
If the position has more than one funding source, continue to select "Add Funding Source Details Entry" and "Save" until all sources are entered. Each time you add an additional entry, you will need to scroll down below the last saved entry to enter a new funding source.									
State Appropriated * Funding / Non-State Appropriated Funding	State Appropriated Funding	Funding Source information							
If non-state, select source of funding:	Please select	will be copied in from the							
If other, designate source		be edited.							
Is this position partially or fully funded on ARRA stimulus monies?	No 💌								
* Budget Code	16070 (State)								
* Fund	111111 Format: 6 digit number #######								
* Org	11111 Format: 5 digit number ######								
* Account	11111 Format: 5 digit number ######								
* Program	111 Format: 3 digit number ###								
Date Funds End									
* Annual Amount	\$45,000								
* Percentage of FTE	1.0								
Remove Entry?									
Add Funding Source Detail E	ntry								

H	liring Proposal Information			
*	Reason For Selection of Candidate		This field is re	Include detailed, job-related selection reasons describing why the selected candidate was the most qualified candidate in the applicant pool.
	Start Date		_	
	Actual Starting Salary			
*	Is Background Check Required?	This field is required.	]	
*	Is Background Check Complete?	This field is required.		Ensure all other required fields are
*	Please Provide Any Background Check Detail		This field is rec	quired.
	Hiring Proposal Number			
*	Have references been checked?	Image: Second state         No           This field is required.         Second state		
*	Is Nepotism Certificate Required? If yes, please attach.	Ses ● No This field is required.		
				Save Next >>

#### Hiring Proposal – Hiring Proposal Summary Tab

The **Hiring Proposal Summary Tab** allows you to perform a final review all information you've entered on the previous tab prior to sending the request to the next step in the approval workflow. Please review the details of the posting summary carefully before continuing.

The **Blue Circle Check** appears by those tabs for which all required information has been entered:

SPA / / Bruce Campbell (Recommend for Hire) / Hiring Proposal / Summary							
Hiring Proposal: Bruce Current Status: Draft Position Type: SPA Section/Unit: Employee Relations Applicant: Emroloyee Relations Counselor (TLB1) Summary History Settint	Created by: Linc Butter Owner: Linc Butter	Take Action On Hiring Proposal + WORK-LOWACTIONS Keep working on this Hiring Proposal Send to Department Head (move to Department Head)					
Hiring Proposal Edit     Candidate Information	Click "Edit" to make edits to a t	ab.					
	Bruce						
Blue Circle Check	Ashley						
Last Name	Campbell						
Primary Phone	336-336-3336						
Email	tibutler@zed.zed						
Social Security Numb	<b>ber</b> 5555						
Date Of Birth	09/10/1971						

An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save"**, and then return to the **Hiring Proposal Summary Tab** by clicking on the link in the left column:

Position Funding Information Edit	Click "Edit" to make edits to a tab.	
Budget Advisory Approval		
Orange Circle EPA and deration of Exclamation Point	PA positions that are funded in whole or in part by general state f he Committee's review process, state below what mission specif	unds requires approval by A&T's Budget Advisory c, essential, and / or key objectives will not be met if the
Mission Specific, Essential and/or Key Objectives not Met without position		

Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example, the appropriate routing action is **"Send to Department Head (Move to Department Head)"**:

SPA /	Hiring Proposal: Bruce Campbell (SPA)     Urrent Status: Draft     Position Type: SPA     Section/Unit: Employee Relations     Applicant: Bruce Campbell     Posting: Employee Relations     Counselor (TLB1)     Summary     History     Settings		Click on "Take Action On Hiring Proposal", then select routing action to move the request to the next step in the approval workflow.	Take Action On Hiring Proposal - WORKFLOWACTIONS Keep wording on this Hiring Proposal Send to Department Head (move to Department Head)
	Summary         History         Settings           Hiring Proposal         Edit           Candidate Information			200

You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send the action to the next level in the approval workflow, click the **"Submit"** button:



If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation:

	Reason For Selection of Candidate" is required and All required fields must be set before transitioning	ing. 😵
	Age State University	Watch List APPLICANT TRACKING
	Home Postings Hiring	ing Proposals   My Profile Help
H	Red bar indicating the required fields that	Linc Butler, you have 0 messages. Supervisor
	need to be completed before submitting the	
	request to the next step in the workflow.	Take Action On Hiring Proposal •

Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

1 Hiring Proposal was successfully transitioned	8
NORTH CAROLINA ALT STATE UNIVERSITY	Watch List APPLICANT TRACKING
Home Postings Hiring Proposals   My Profile Help	
Linc Butter	, you have 0 messages. Supervisor 💌 C logout
Green confirmation bar indicating the Pending Request was successfully transitioned and added to your Watch List.	A Print Preview
Applicant: Bruce Campbell Posting: Employee Relations Counselor (TLB11)	

The next level approver (the Department Head in this example) will receive the pending Hiring Proposal request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable). Once the Hiring Proposal has been approved at all levels within your Division, School, or College, the next step in the approval workflow is to route the Hiring Proposal to Recruitment:

NORTH CAROLINA ART STATE UNIVERSITY				0	Inbox PeopleAd Watch List APPLICANT	IMIN I TRACKING 🔻
	Home Postings	Hiring Proposals	My Profile	Help		
				Linc Butler, you have 0 messages.	Dean/Vice Chancellor	C logout
SPA / / Bruce Campbell (Recommend for Hire)  Hiring Proposal: Bruce Current Status: Dean/Vice Chancellor Position Type: SPA Section/Unit: Employee Relations Applicant: Bruce Campbell Posting: Employee Relations Counselor (TLB11)  Summary History Setting  Hiring Proposal Edit	/ Hiring Proposal / Summary Campbell (SPA) Edit Created by: Linc Butler Owner: Dean/Vice Chancellor			Take Action On H WORKFLOW ACTIO Keep working o Proposal Send to Recruit (move to Make	irring Proposal v xrs n this Hiring ment to Make Offer Offer)	

You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send the action to the next level in the approval workflow, click the **"Submit"** button:

	Take Action		
Edi cell	Send to Recruitment to Make Offer (move to Make Offer)	Con viev in tl	nments are optional and can be ved by the next level approver ne History tab.
	Add this hiring proposal to your watch list?		Adding the action to your Watch List allows you to easily track and monitor the action's progress.

If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation:

😮 "Reason For Selection of Candidate" is required and All required fields must be set before transitioning.					
Watch List	APPLICANT TRACKING				
ing Proposals   My Profile Help					
Linc Butler, you have 0 messages. Supervisor	C logout				
Take Action On Hiring Proposal +					
i	ning. Watch List iring Proposals   My Profile Help Linc Butler, you have 0 messages. Supervisor Take Action On Hiring Proposal				

Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

	Hiring Proposal was successfully transitioned		8
	NORTH CAROLINA ART STATE UNIVERSITY	Watch List	APPLICANT TRACKING
	Home Postings Hiring Proposals   My Profile Help		
1		Linc Butler, you have 0 messages. Superviso	logout
	Green confirmation bar indicating the Pending Request was successfully transitioned and added to your Watch List.	A Print Preview	
	Applicant Bruce Campbell Posting: Employee Relations Counselor (TLB1)		

The next level approver (the Department Head in this example) will receive the pending Hiring Proposal request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

### Hiring Proposal - Saving to Return to a Pending Request Later

On the **Summary Tab** is an important menu item which should be selected if you need to stop a work session on the posting before submitting it to the next level for approval. Following this step will ensure that all your work is saved when you open the request for completion.

- 1) Click the "Save" button located in either the top or bottom right corner
- 2) Select "Summary" from the Tab List (illustrated above)
- 3) Select "Keep Working on this Posting"



- 4) Add any Comments into the window that opens (below) as notes to yourself, if desired.
- 5) Click "Submit"

Take Action	×				
Keep working on this Hiring Proposal					
Comments (optional)	Enter comments if desired.				
Add this hiring proposal	to your watch list?				
Submit when complete.					
	Take Action Keep working on this H Comments (optional)				

The **Hiring Proposal** can be located when you log into the Applicant Tracking module again as the same **User Type** you used to begin the action.