PEOPLE ADMIN USER GUIDE

Table of Contents

This table of contents contains links to each section so you can easily navigate directly to a specific section of the user guide without scrolling. Each section heading in the user guide is also linked back to its corresponding entry in the table of contents so you can easily navigate back to the table at any time.

3.Applicant Tracking

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

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

Enter your Username and Password here.

Click here to request a new account or a password reset.

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:
  - A lowercase letter
  - An uppercase letter
  - A numerical digit (1, 2, 3, 4, etc.)
  - Special character (#, $, %, &, etc.)

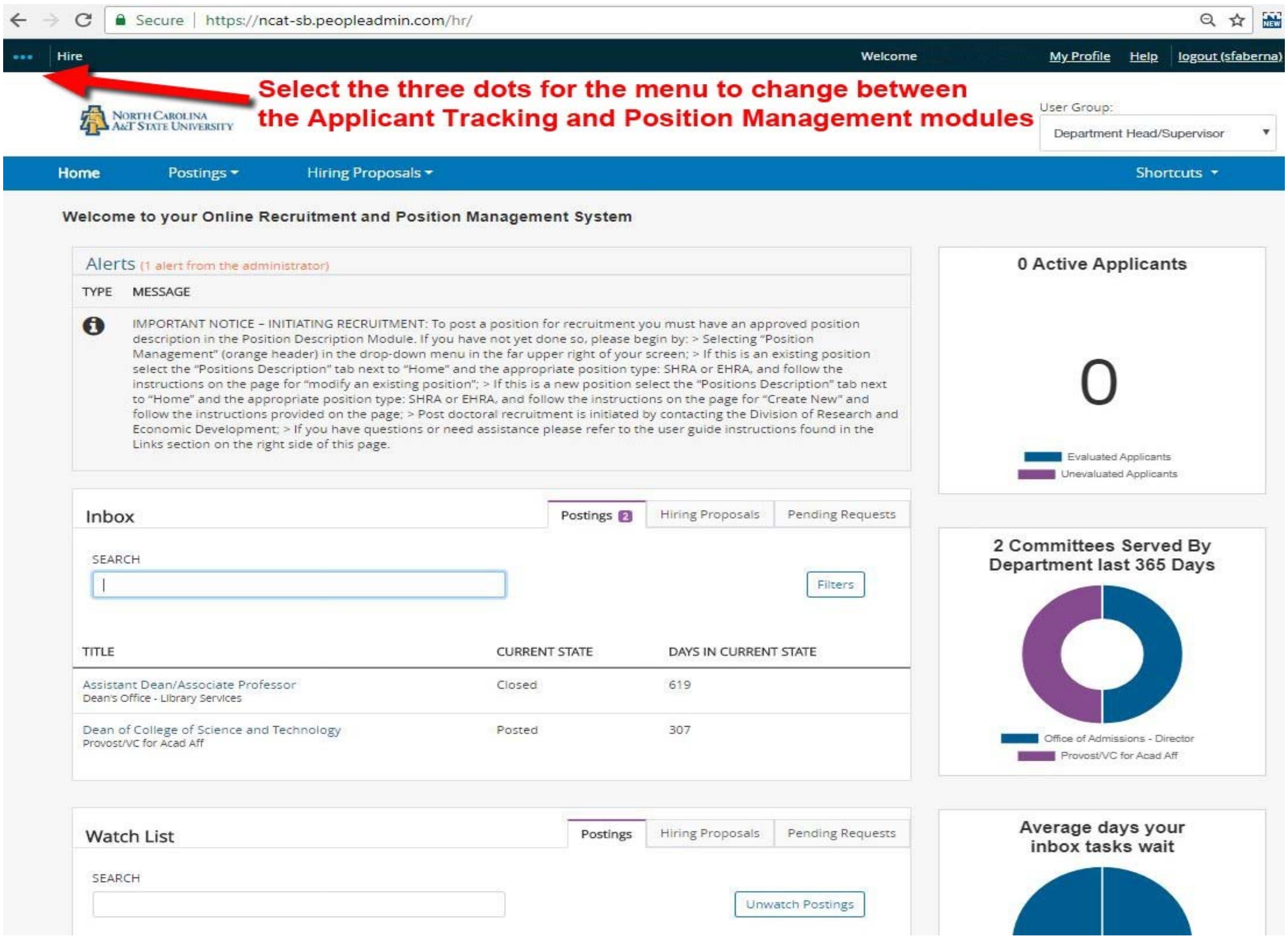
Home Page Elements

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.**



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.

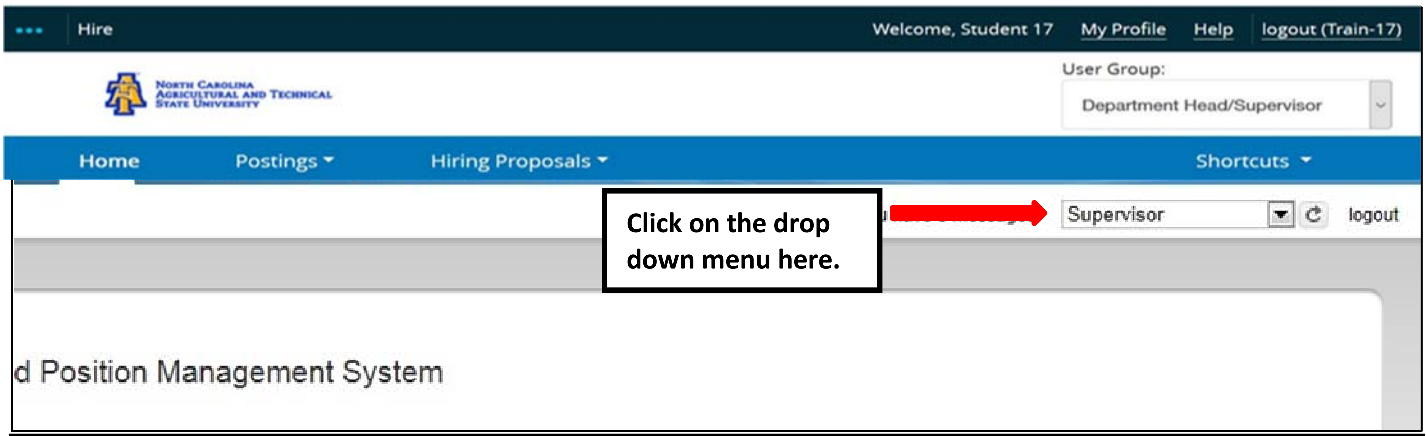
New Watchlist Functionality

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.

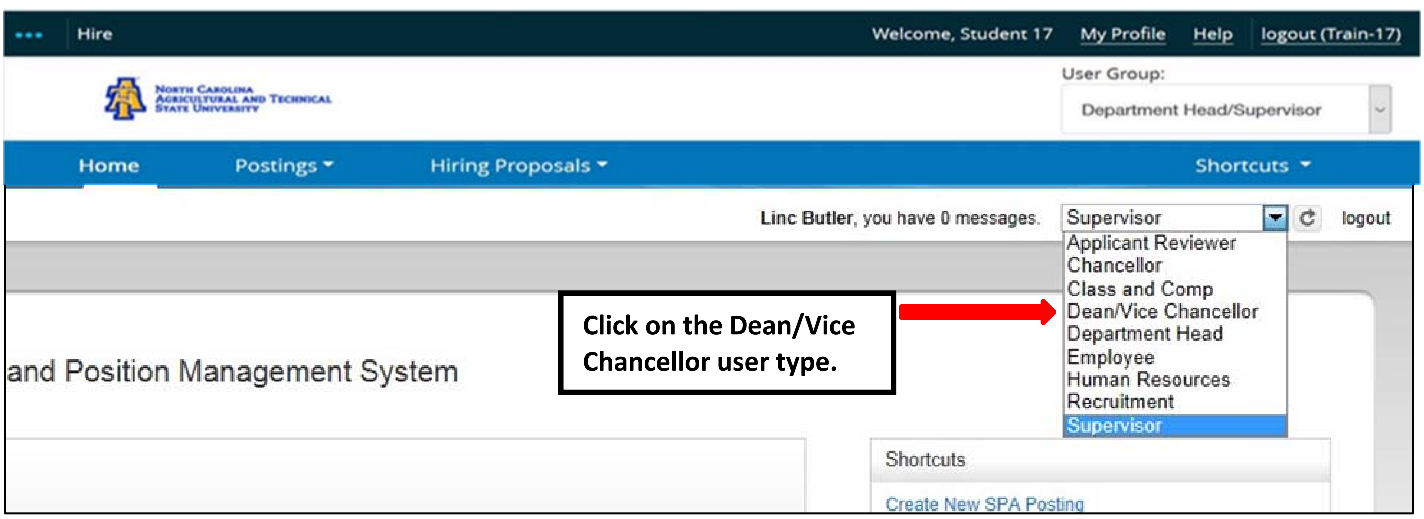
System Basics - Switching Between User Types

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.

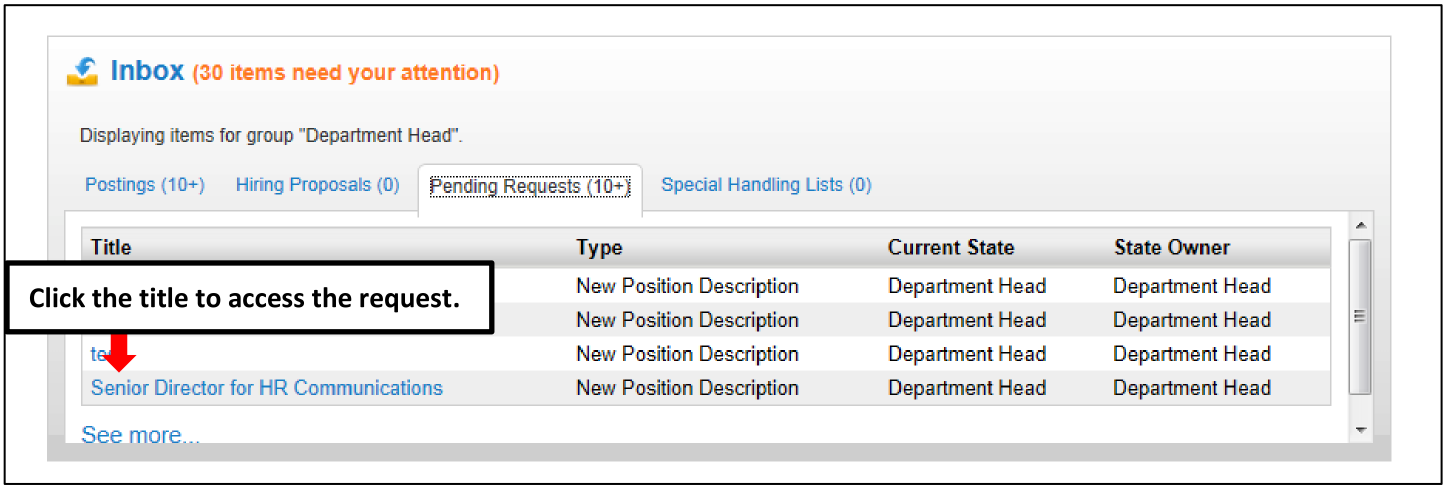
You can switch between assigned user types at any time clicking on the drop down menu located on the top right corner of the page just above the grey bar:



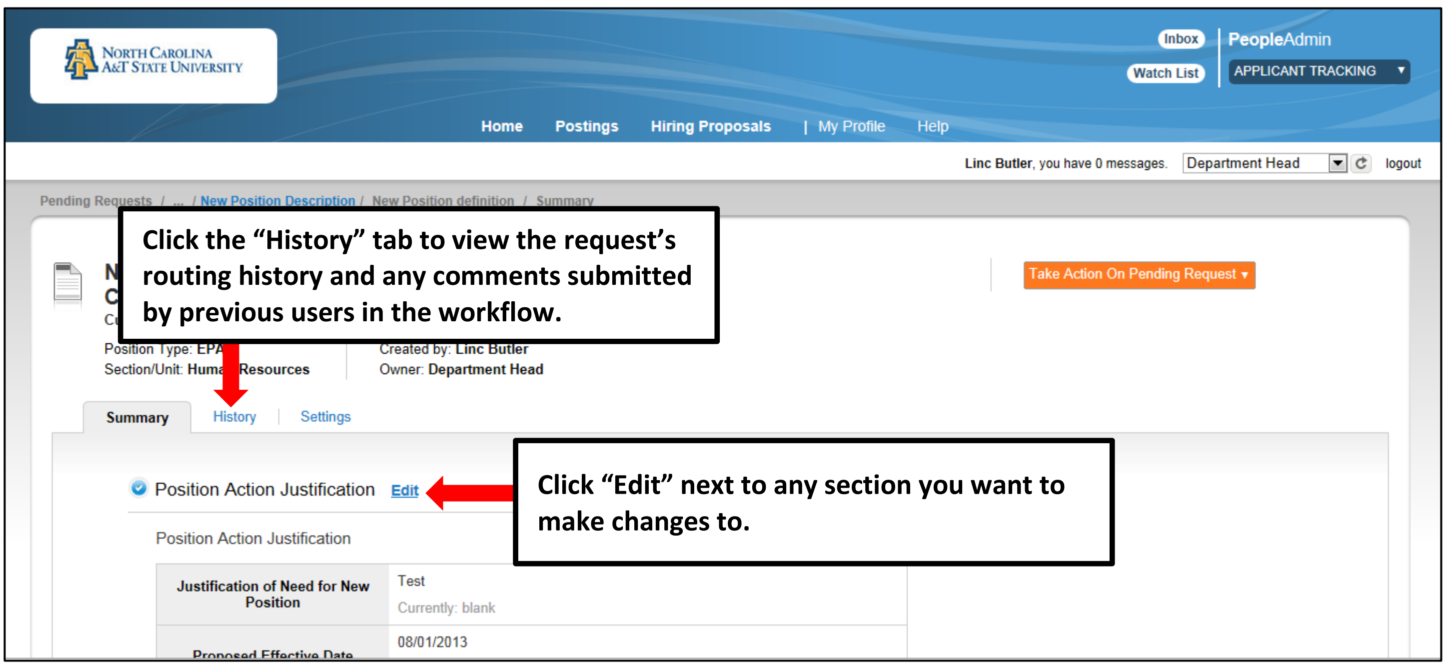
Then select the user type you want to switch to by clicking on that user type.



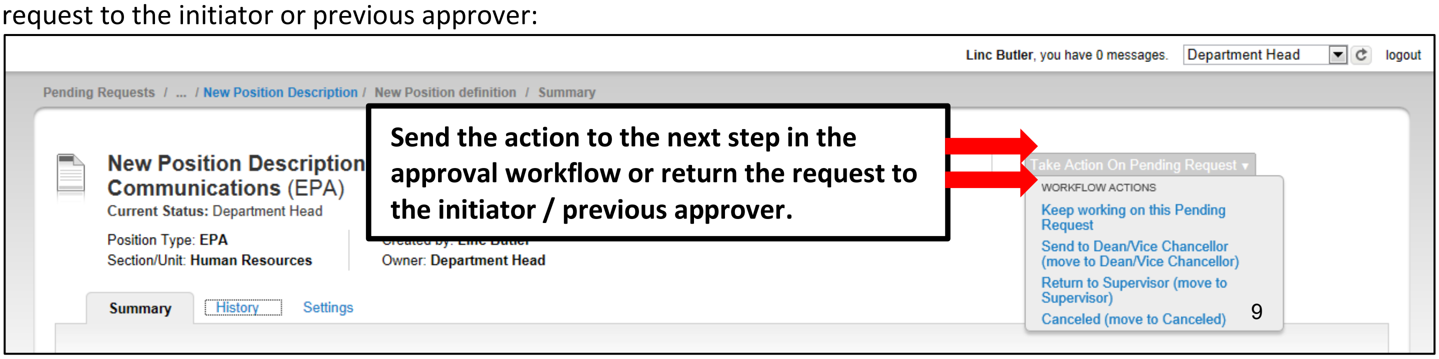
When a request appears in your **Inbox** under the **Pending Requests** tab, you can access the request by clicking on the **Title**:



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:

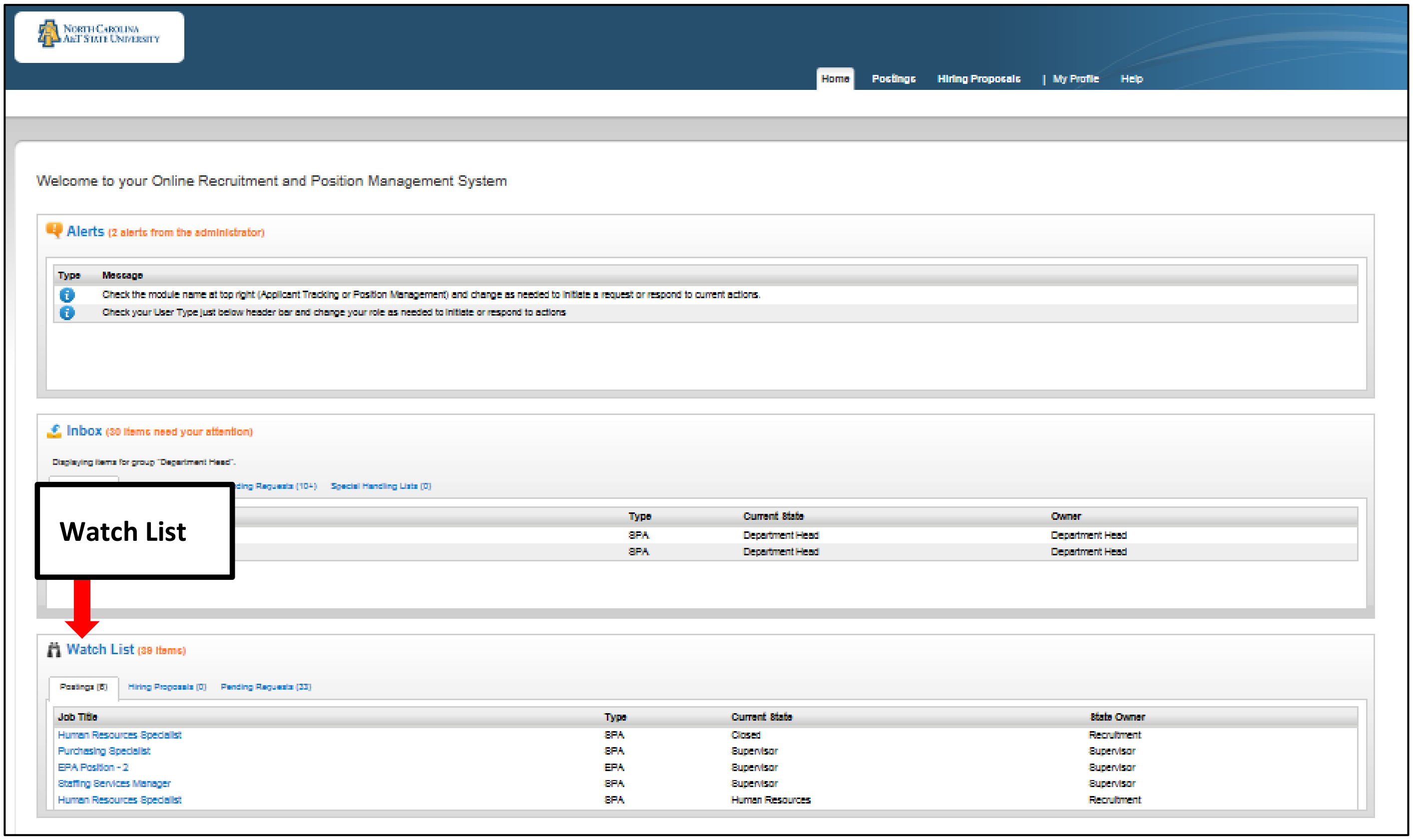


Once the information in the request meets your approval, click the orange **"Take Action on Pending Request"** button in order to send the action to the next step in the approval workflow or to return the request to the initiator or previous approver:

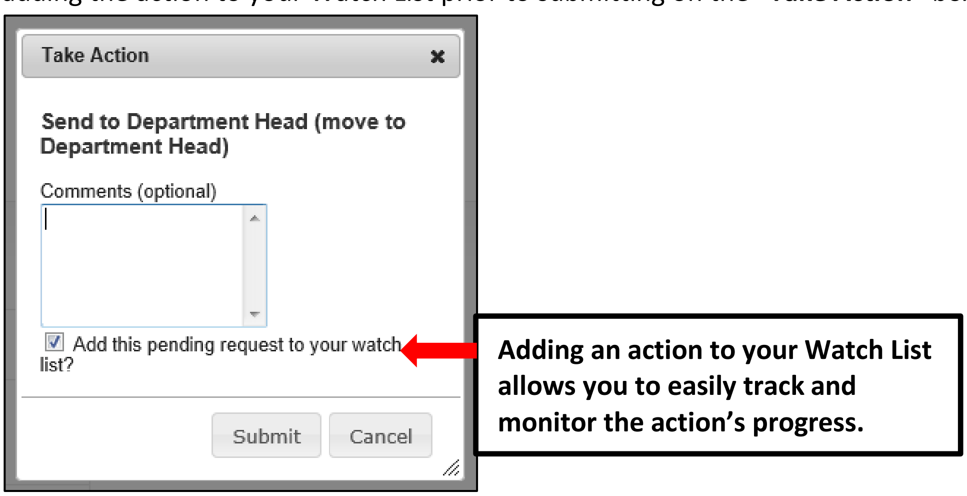


System Basics - Using the Watch List

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:

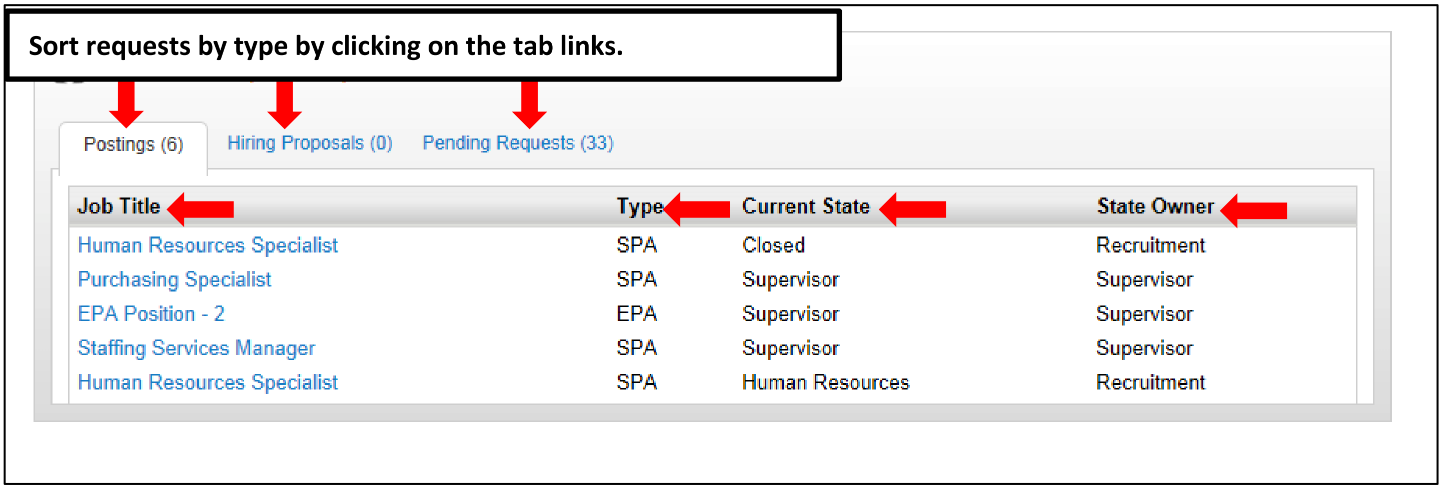


When routing an action to the next step in the approval workflow, you are given the option of adding the action to your Watch List prior to submitting on the **"Take Action"** box that appears:

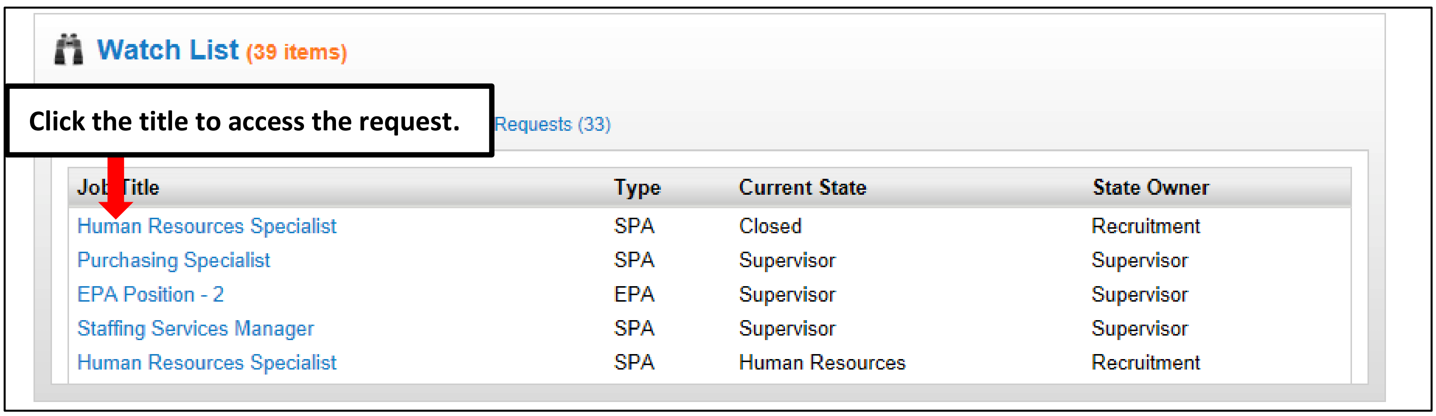


Once an action is added is to your Watch List, you can view requests by type by clicking on the tabs at the top: **Postings, Hiring Proposals, and Pending Requests**. You can also quickly view information about each request in the list**:**

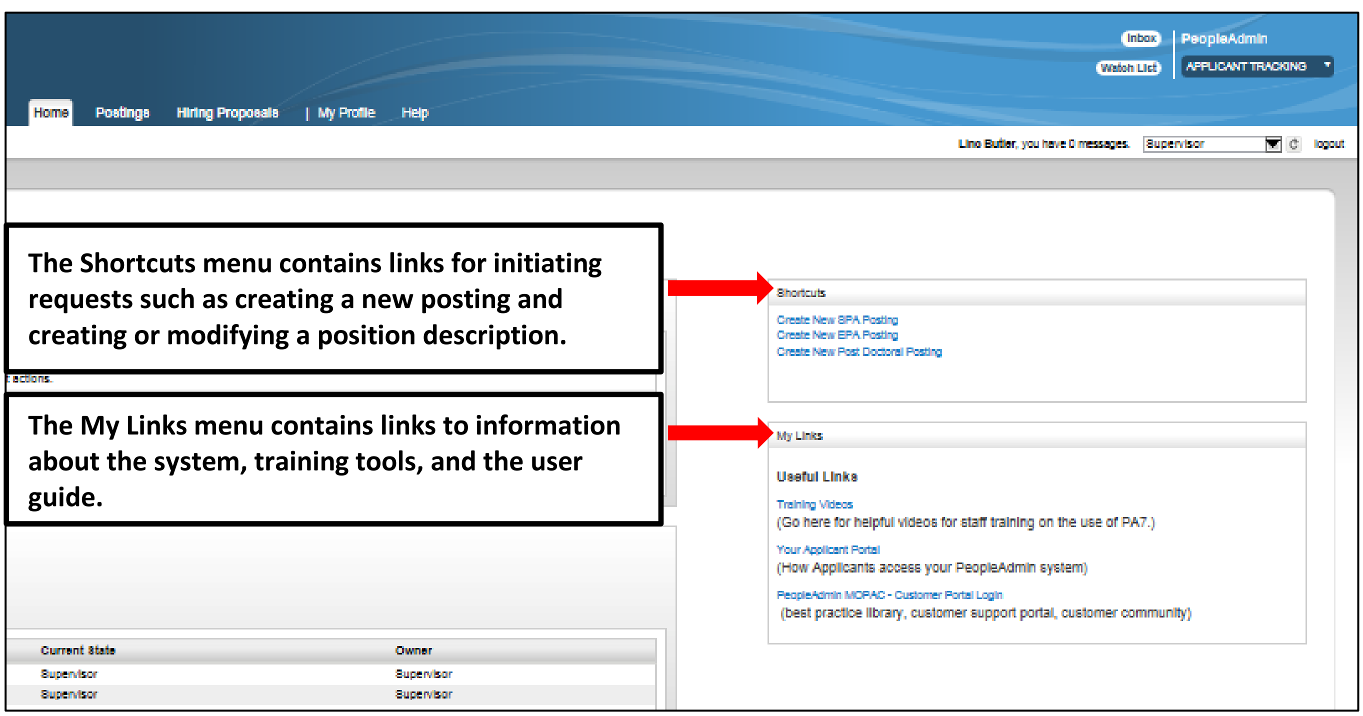
- **Job Title:** Indicates the title of the position related to the request.
- **Type:** Indicates the type of request by position type (EHRA, SHRA, or Post Doctoral).
- **Current State:** Indicates what step of the approval workflow the request is in.
- **State Owner**: Indicates the user that needs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



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:



System Basics - Shortcuts and My Links



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:

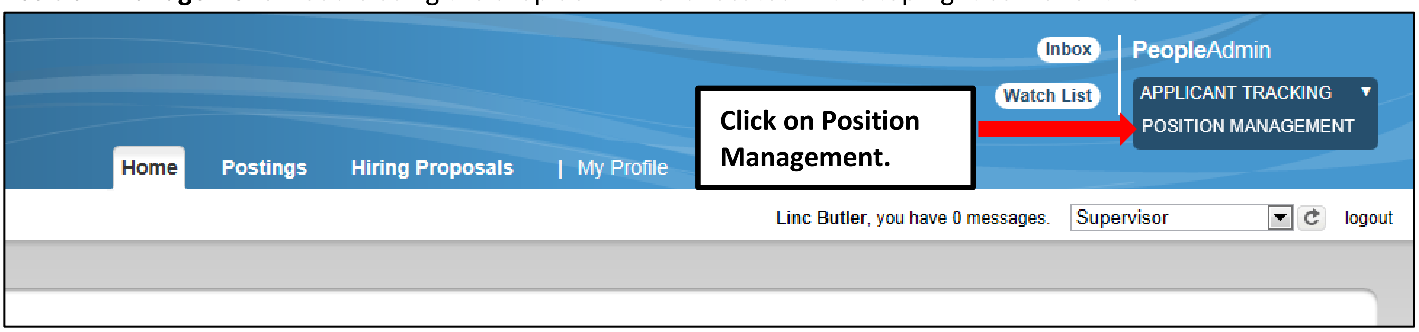
- Create New Position Description
- Modify Position Description

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.

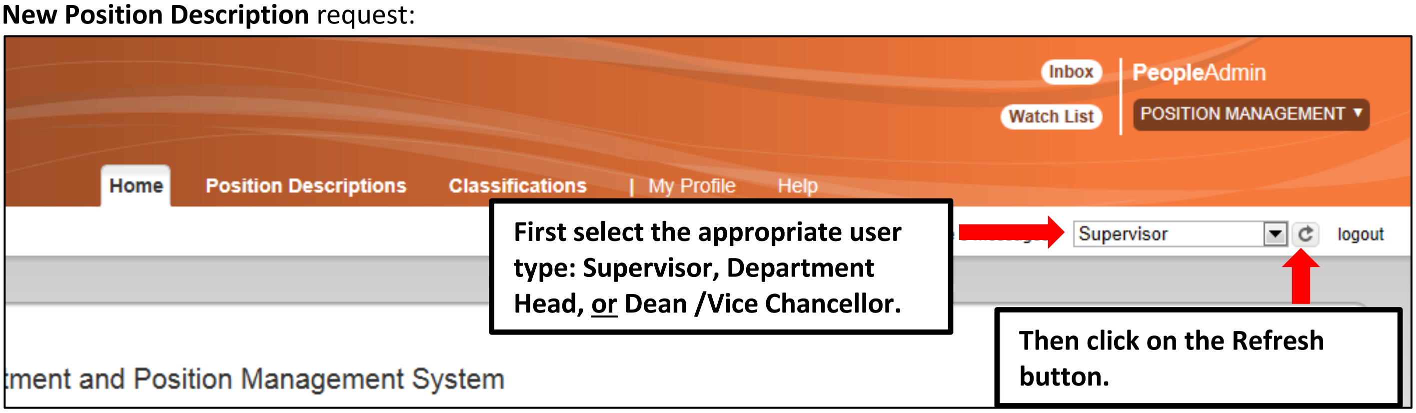
Create New Position Description - SHRA

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.

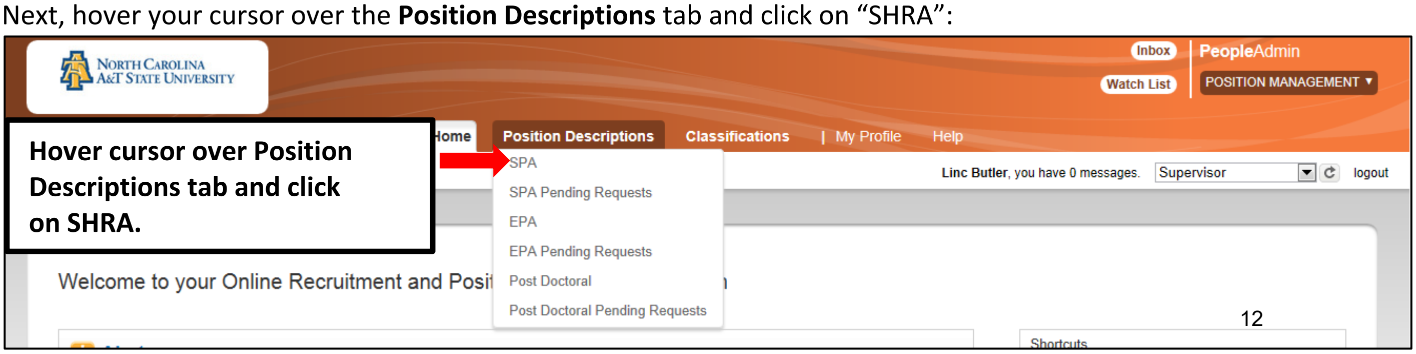
To initiate a **Create New Position Description** request for an SHRA position, first switch to the **Position Management** module using the drop down menu located in the top right corner of the



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 **Create New Position Description** request:



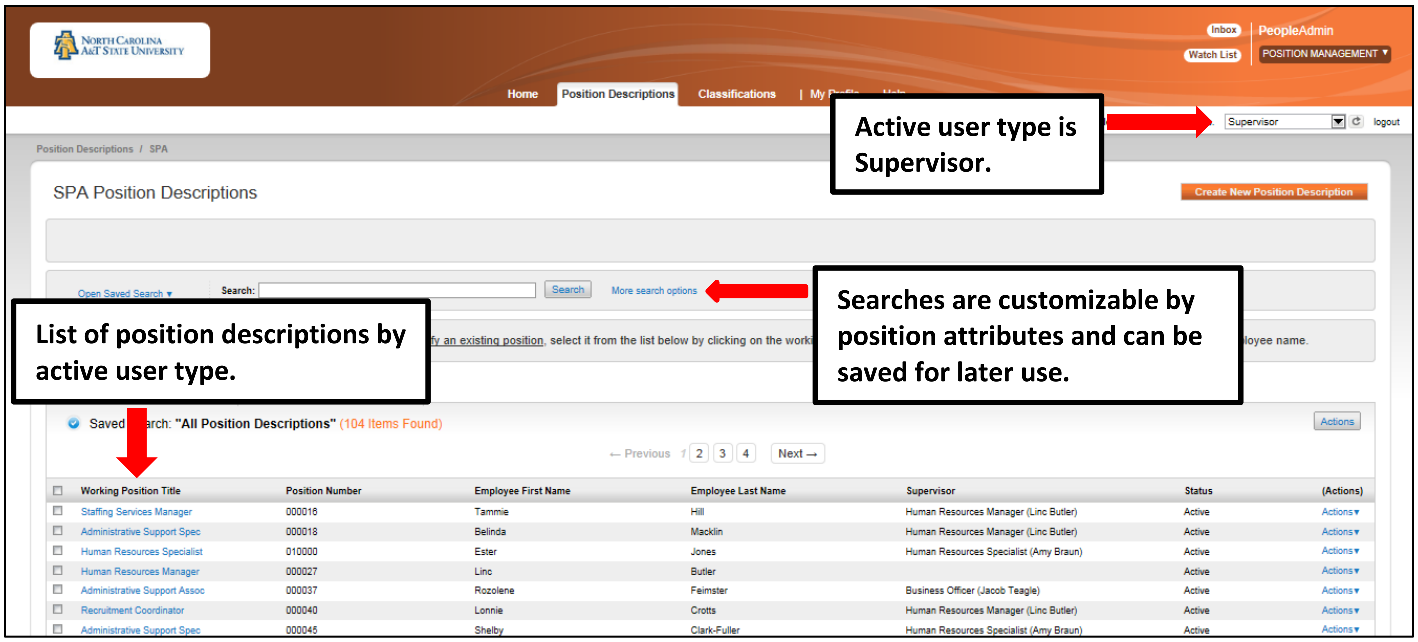
Next, hover your cursor over the **Position Descriptions** tab and click on "SHRA":



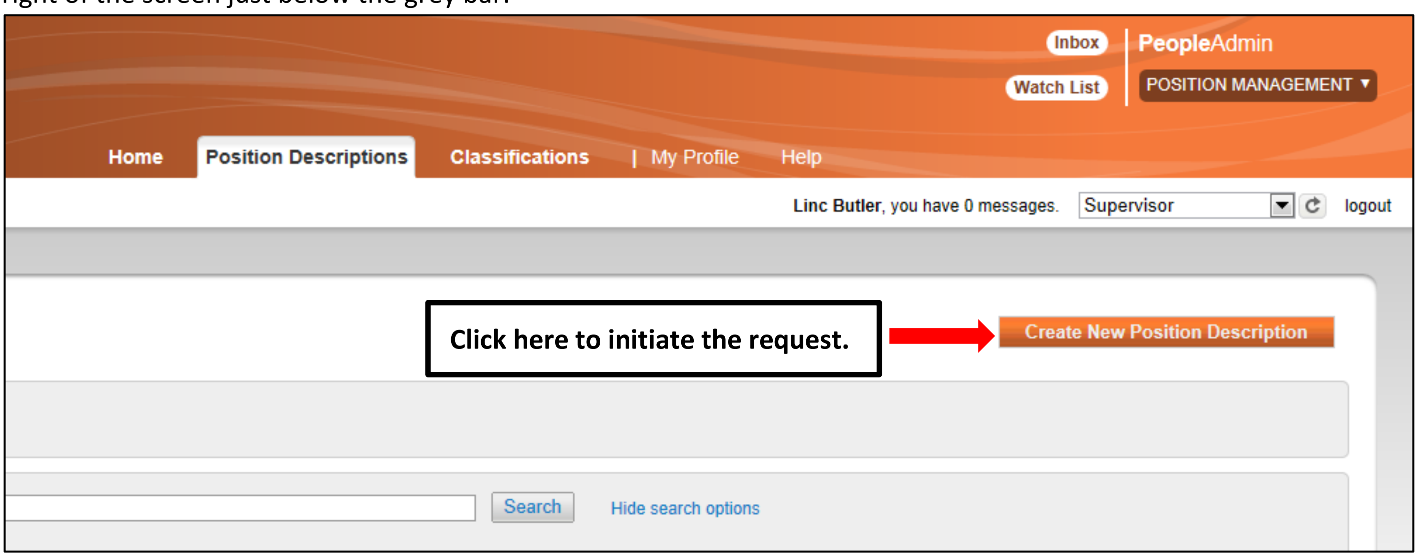
You will then be taken to the **Position Descriptions** view, which provides a list of all position descriptions based on your active user type as follows:

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.

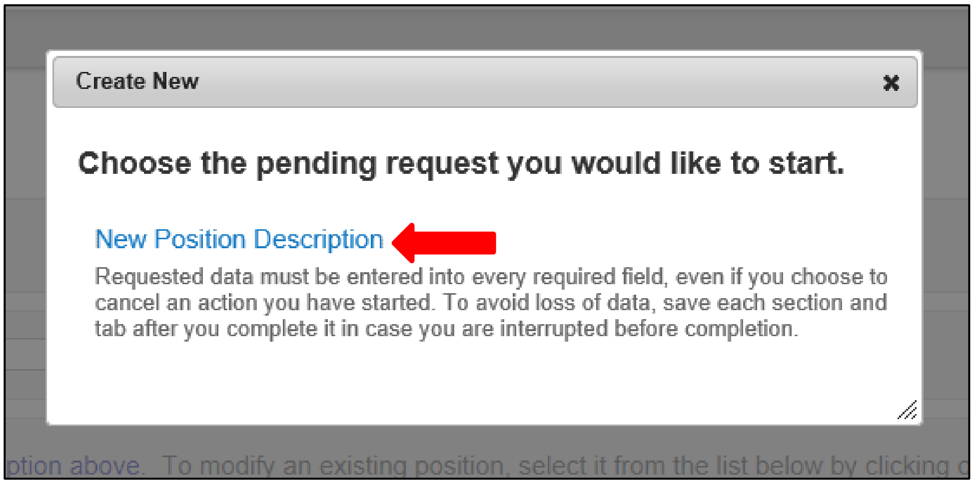
In the **Position Descriptions** view, you can search position descriptions by any number of criteria, including but not limited to position title, position number, employee name, supervisor name, or position status. Searches are fully customizable by position attributes, and you can save custom searches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



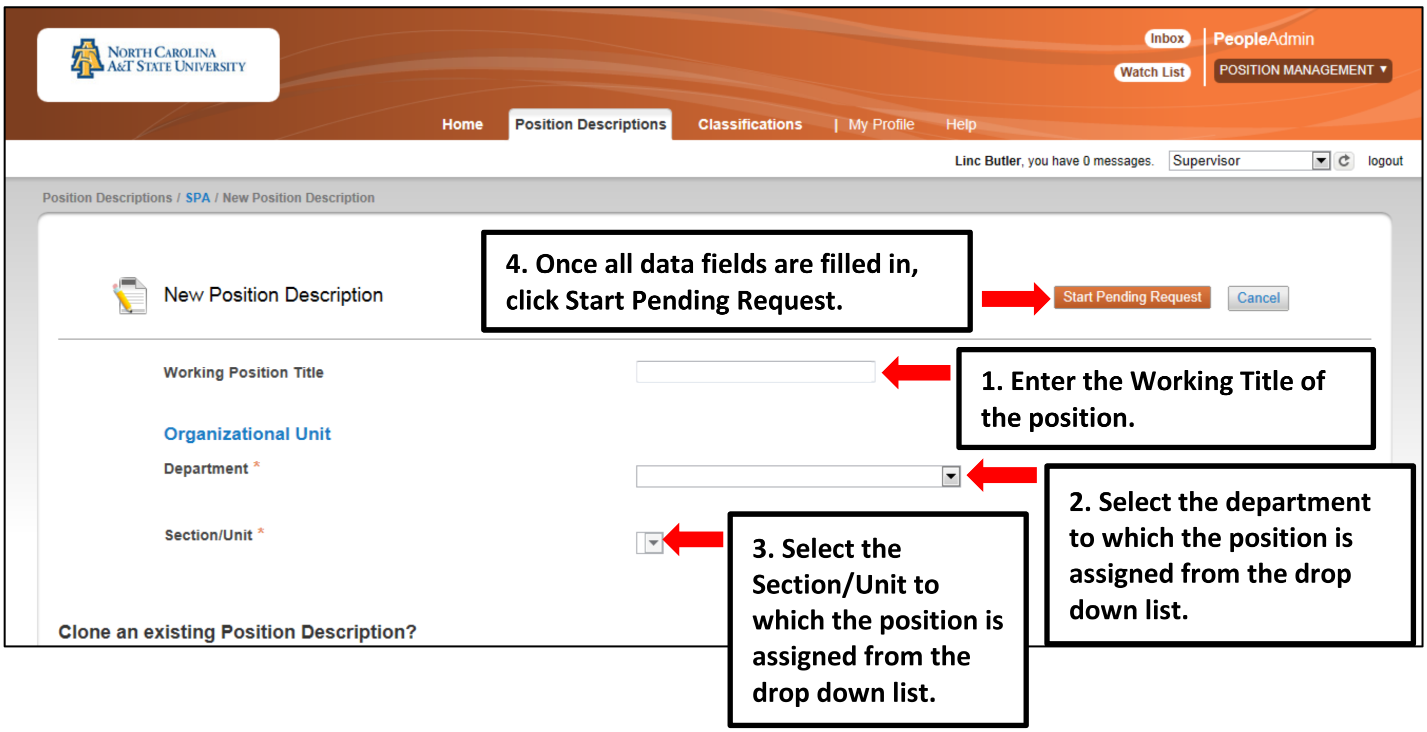
To initiate the request, click on the orange **Create New Position Description** button located on the top right of the screen just below the grey bar:



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:

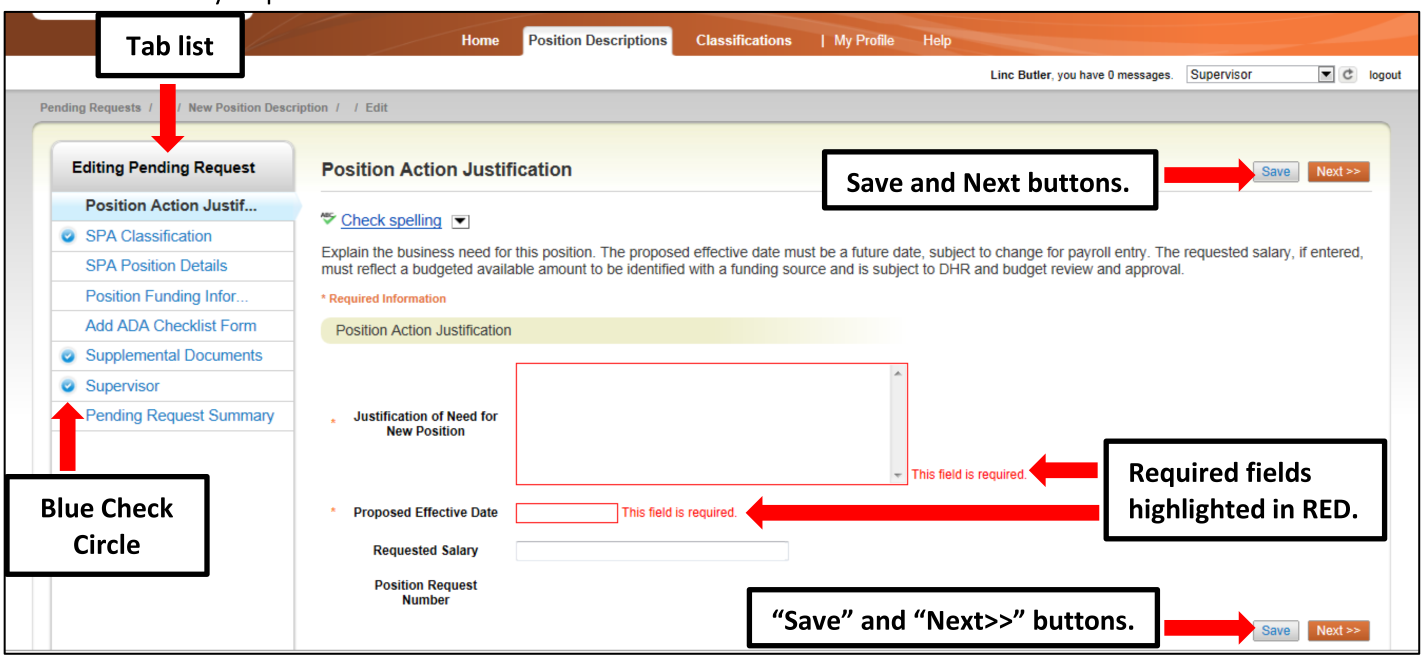


SHRA Create New - Edit Pending Request Page - General Navigation

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.

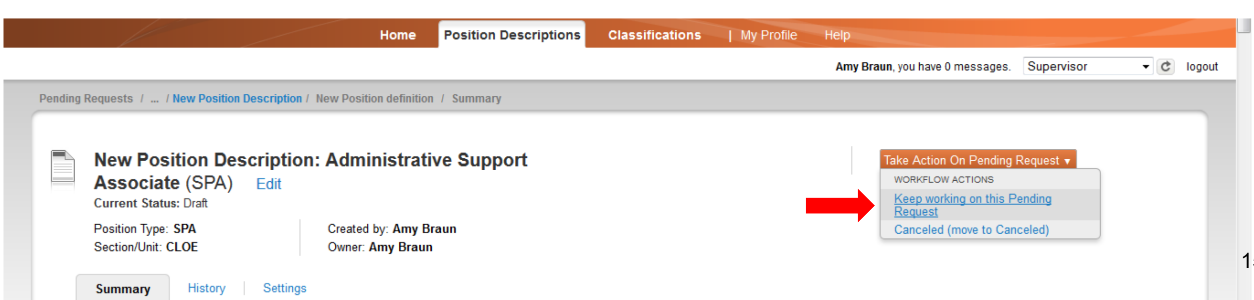
Required fields are highlighted in red and must be filled in before the Position Description can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check Circle** also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



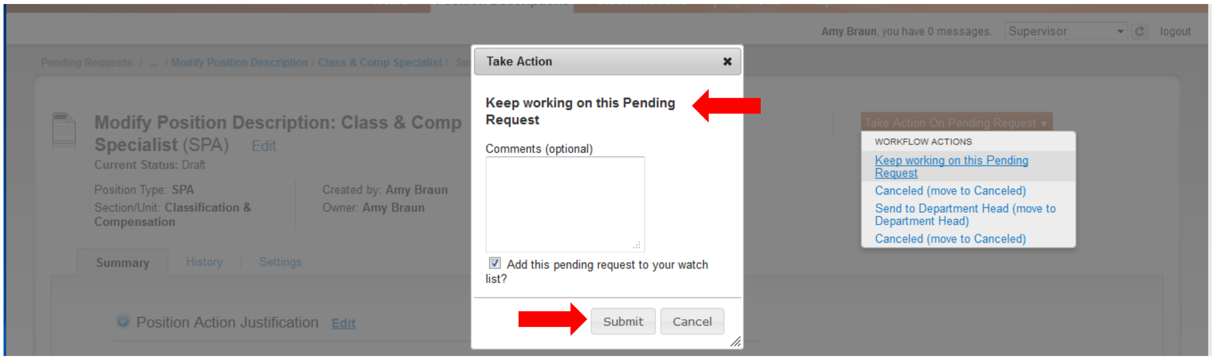
SHRA Create New - Saving to Return to a Pending Request Later

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"



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

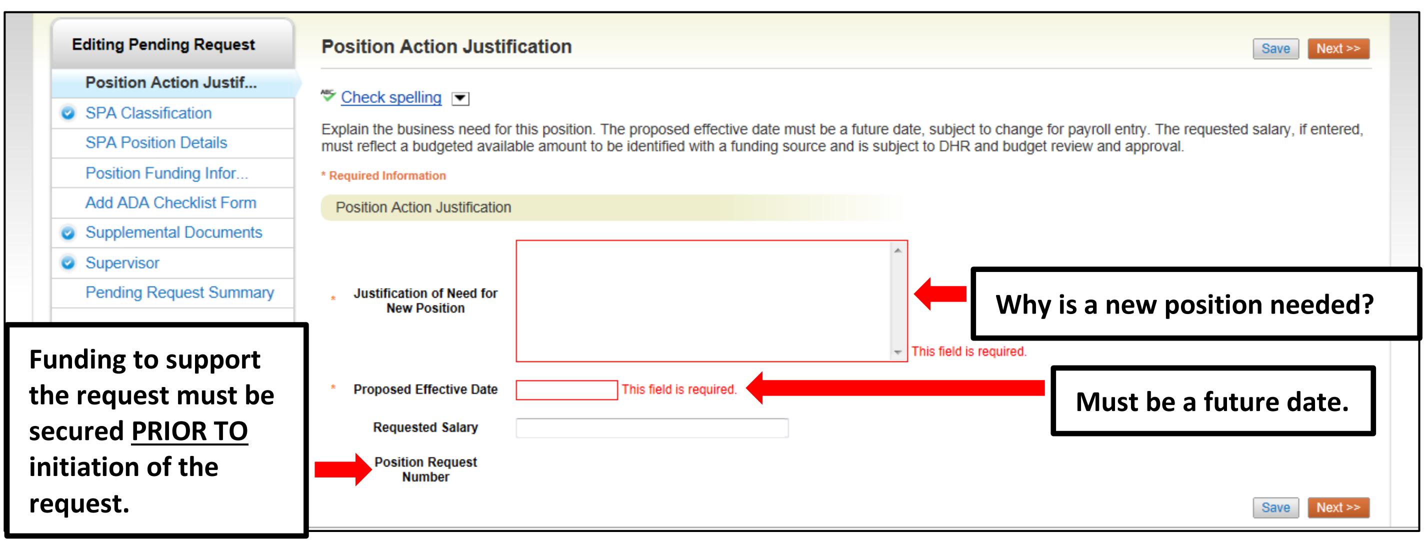


The **Pending Request** on this position description numbers can be located when you log into the Position Description module again as the same **User Type** you used to begin the action. Hover your cursor over the **Position Descriptions tab** and click on "**SHRA Pending Requests**."

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:



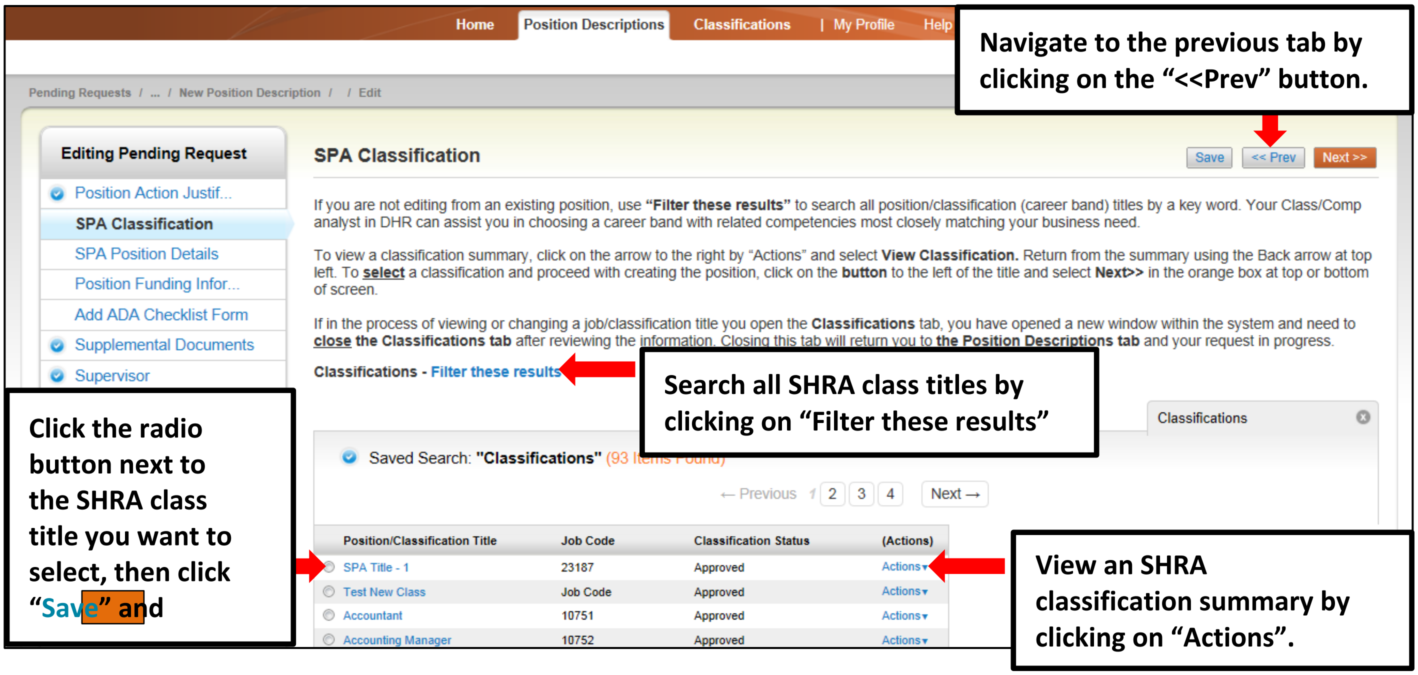
SHRA Create New – Classification Tab

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.

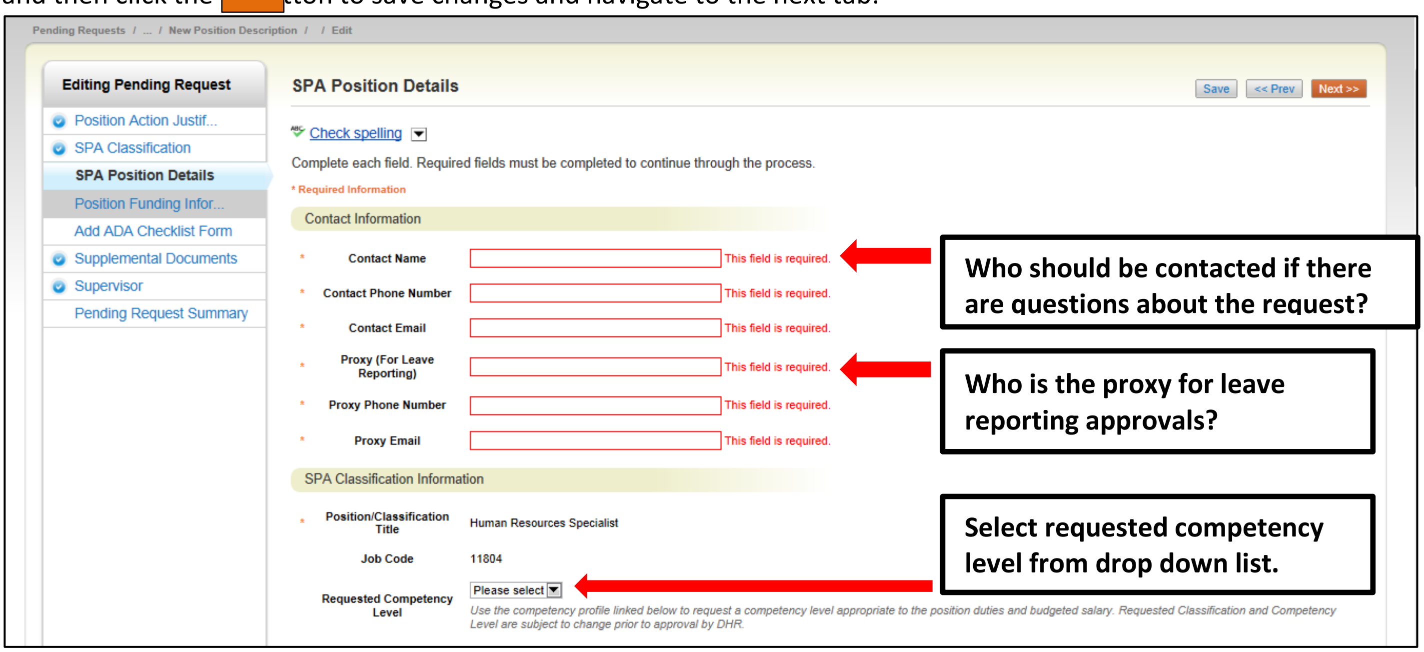
Clicking on the "**Position/Classification Title"** will open the "**View Classification"** page in a new tab within our web browser. After reviewing the classification summary information, you will need to close this tab in order to return to the **SHRA Classification** tab and your request in progress.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

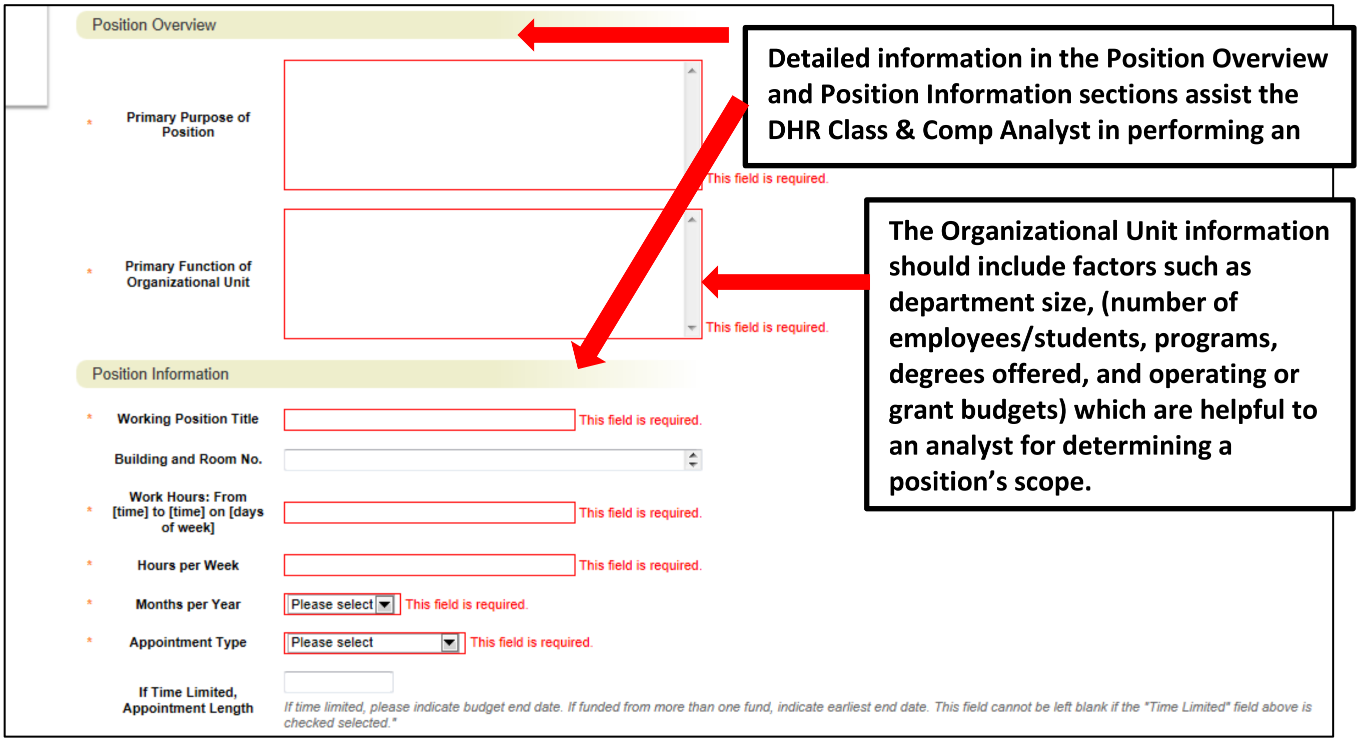
You can navigate to the previous tab by clicking on the grey "**<<Prev**" button located between the **Save** and **Next** buttons on the top right-hand corner of the page:



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:



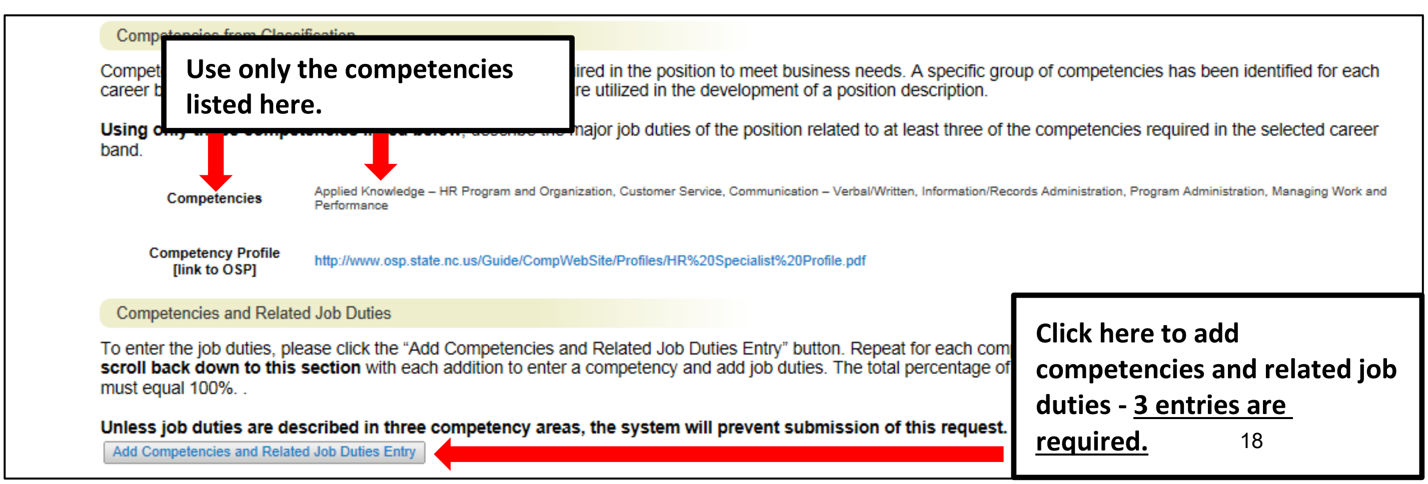


SHRA Create New - Position Details Tab – Competencies and Related Job Duties

The next section of the Position Details tab is used to build **current duties and responsibilities** into the position. It is the *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 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 ***scroll down*** through the other sections again to see then location to add the new entry.



Competencies from Classification

Competencies are knowledge, skills, and abilities that are required in the position to meet business needs. A specific group of competencies has been identified for each career band title. They must be demonstrated on the job and are utilized in the development of a position description.

Using only those competencies listed below, describe the major job duties of the position related to at least three of the competencies required in the selected career band.

Competencies	Applied Knowledge – HR Program and Organization, Customer Service, Communication – Verbal/Written, Information/Records Administration, Program Administration, Managing Work and Performance
Competency Profile [link to OSP]	http://www.osp.state.nc.us/Guide/CompWebSite/Profiles/HR%20Specialist%20Profile.pdf

Competencies and Related Job Duties

To enter the job duties, please click the "Add Competencies and Related Job Duties Entry" button. Repeat for each competency relevant to job functions. You will need to **scroll back down to this section** with each addition to enter a competency and add job duties. The total percentage of time allocated for all the tasks and responsibilities must equal 100%. .

Unless job duties are described in three competency areas, the system will prevent submission of this request.

* **Competency** Please select

Select competency from the drop down list.

* **Describe the specific job duties related to this competency**

Describe specific job duties related to competency.

* **Percentage Of Time**

Indicate percentage of time spent performing duties described.

Remove Entry?

Add Competencies and Related Job Duties Entry

SHRA 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.

Select Yes or No from drop down list.

HELP TEXT: Supervisory positions conduct interviews, make final hiring decisions, provide salary recommendations, monitor and assign work, counsel and discipline employees under direct supervision, develop work plans and conduct performance appraisals for PERMANENT employees. If this position performs ALL of the ABOVE supervisory responsibilities, please indicate the following:

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 Preferences

Information from this section is used to populate the job posting when it is time to recruit.

* **Is this position considered an essential position?** Please select This field is required.

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>>

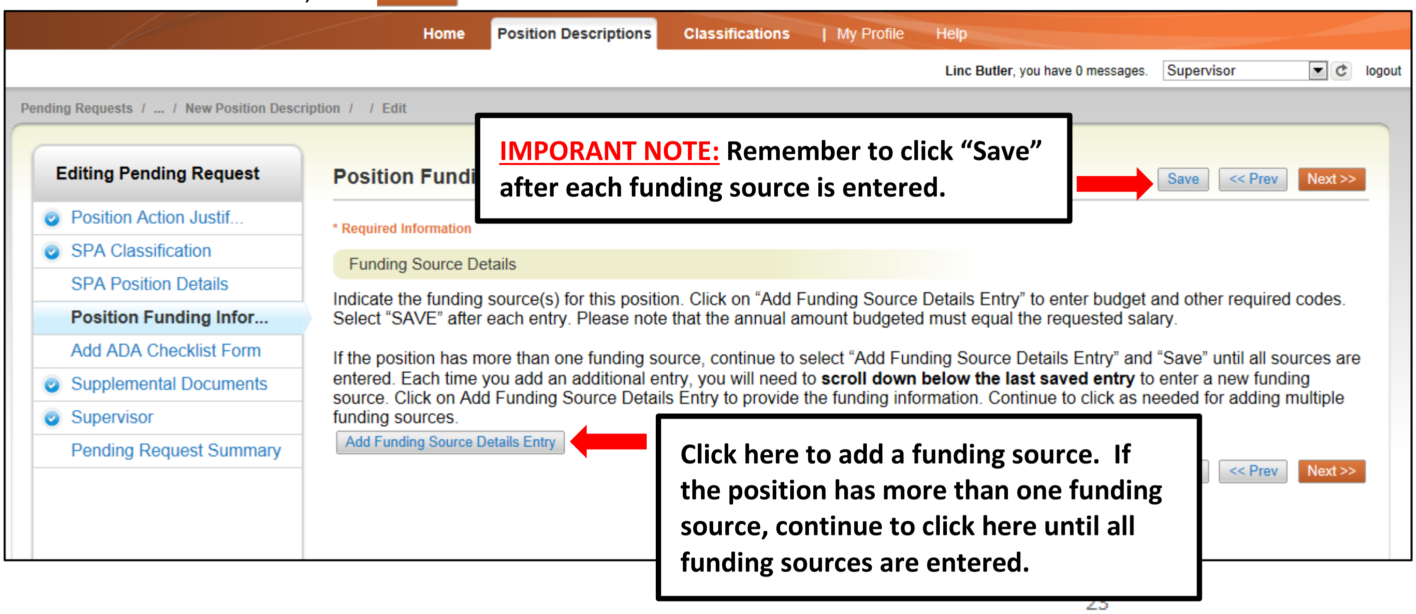
Save | << Prev | Next >>

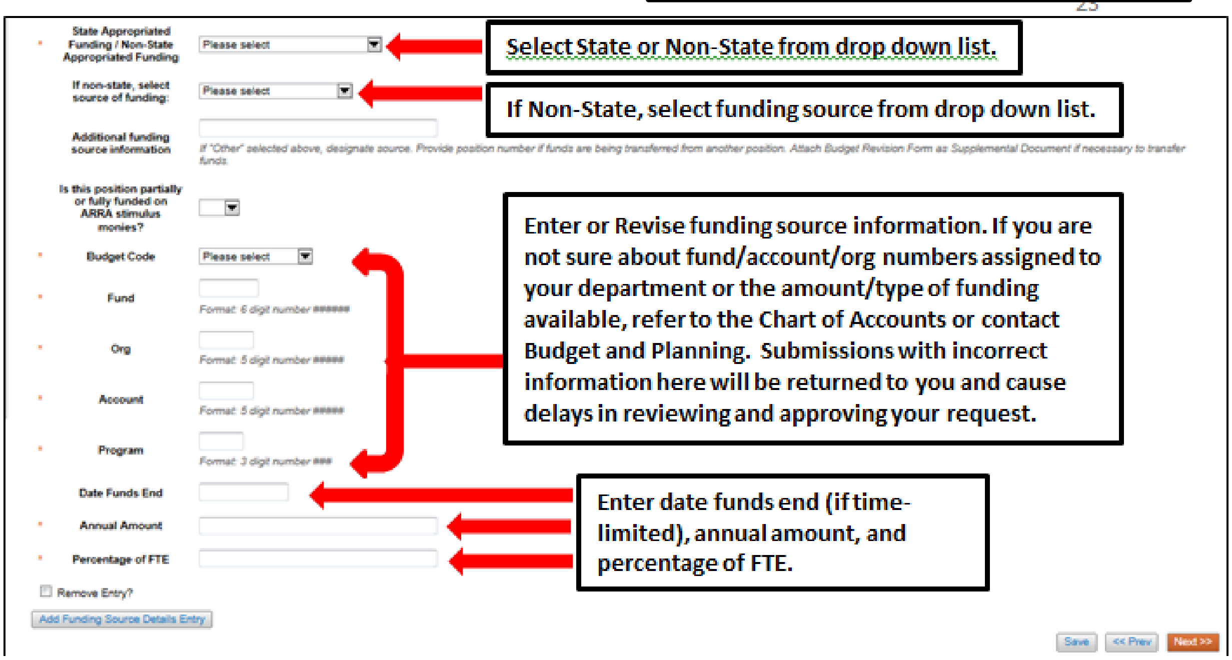
SHRA Create New - Position Funding Information Tab

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:



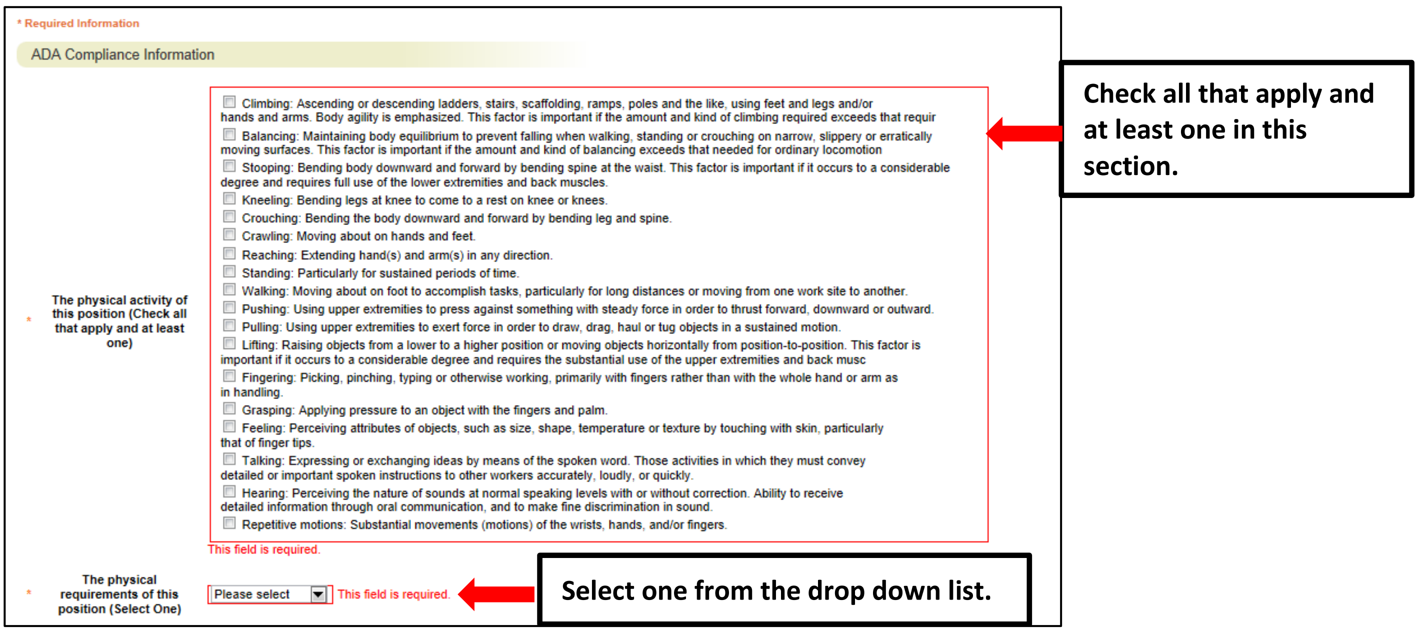


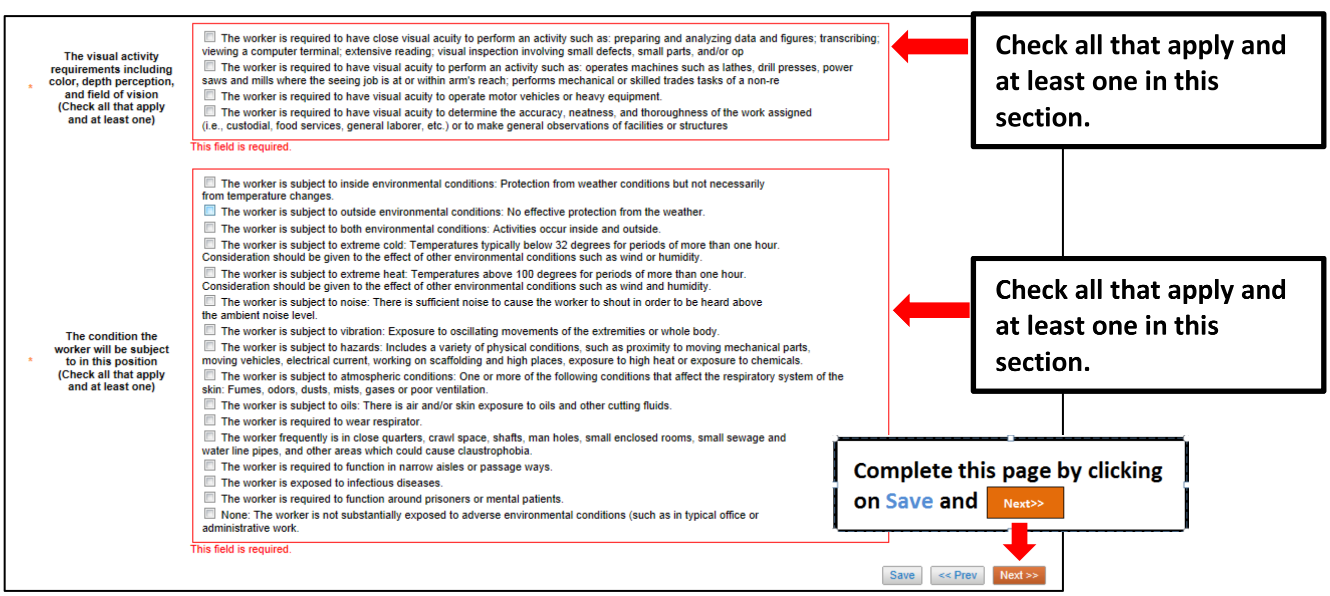
SHRA Create New - Add ADA Checklist Form Tab

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





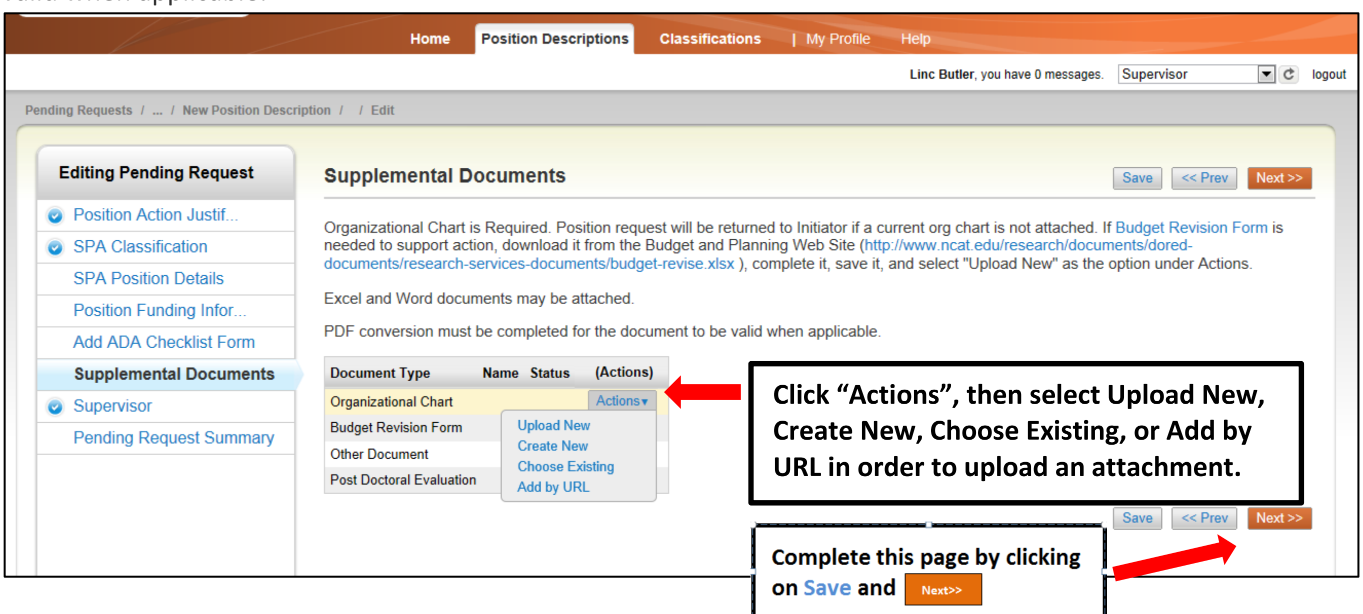
SHRA Create New - Supplemental Documents Tab

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.

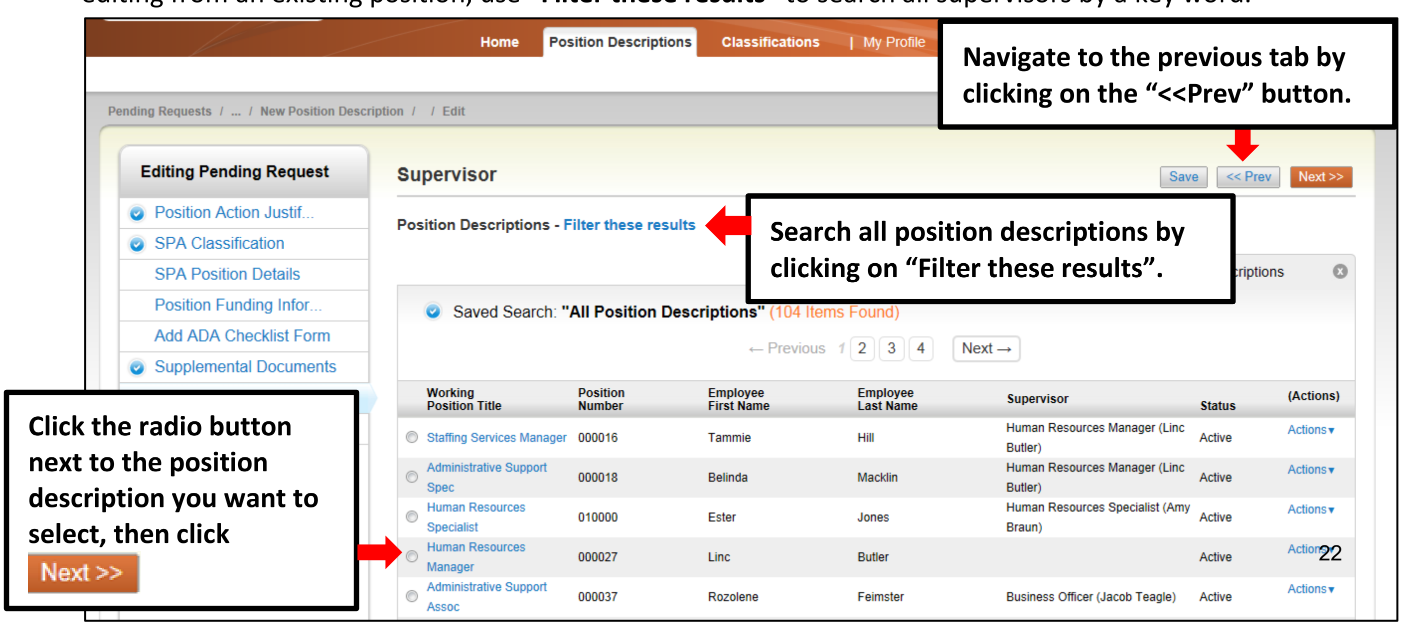
The Organizational Chart is required. Position requests will be returned to the Initiator if a current organizational chart is not attached. If a Budget Revision Form is needed to support the request, you can download it from the Budget and Planning Web Site (http://www.ncat.edu/research/documents/dored-documents/research-services-documents/budget-revise.xlsx),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



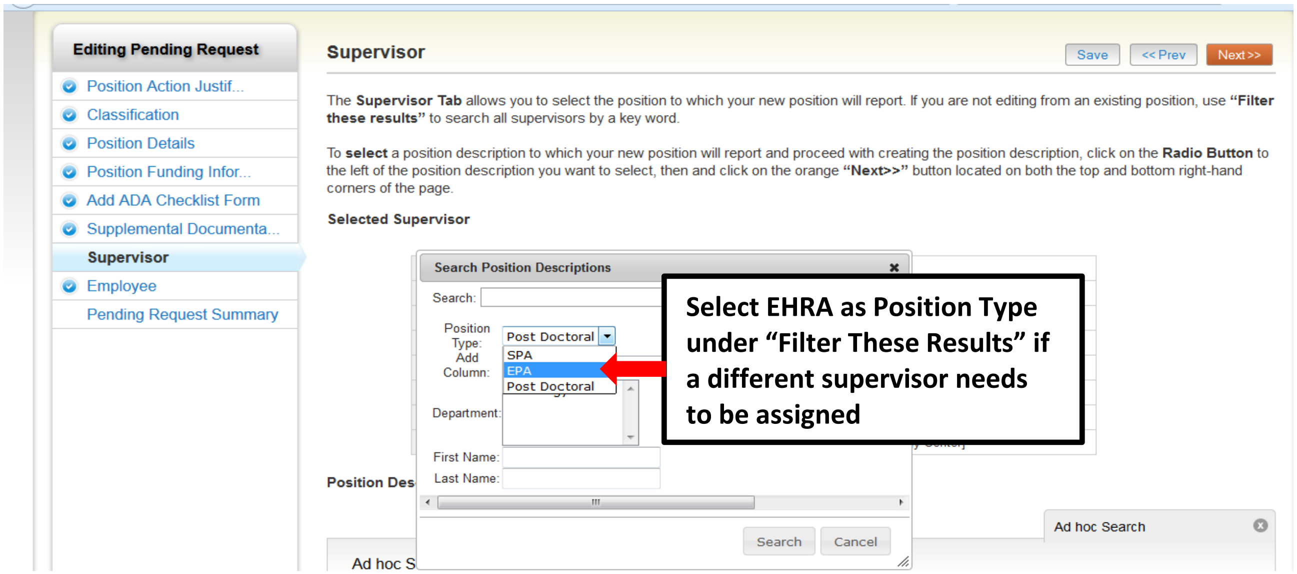
SHRA Create New - Supervisor Tab

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.



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 Next>> 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 *different* Position Type (for example EHRA supervising SHRA), click on "**Filter these results**" and select the Position Type to which the supervisor of the position belongs. Then click on

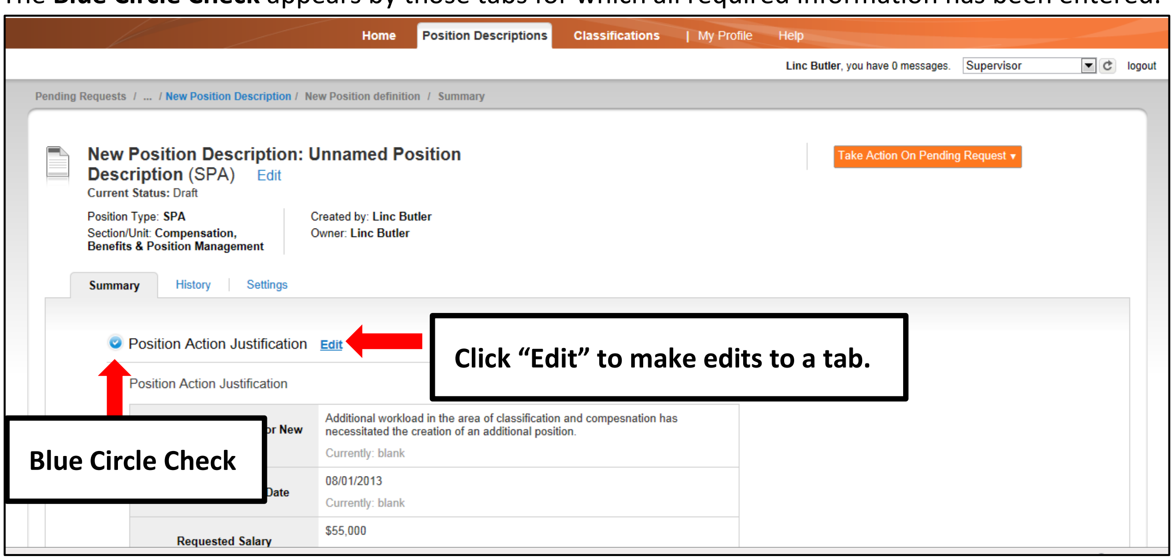


REMEMBER: The positions that appear in this list are also based on your active user type (Supervisor, Department Head, Dean / Vice Chancellor) and the organizational unit to which you are assigned.

SHRA Create New - Pending Request Summary Tab

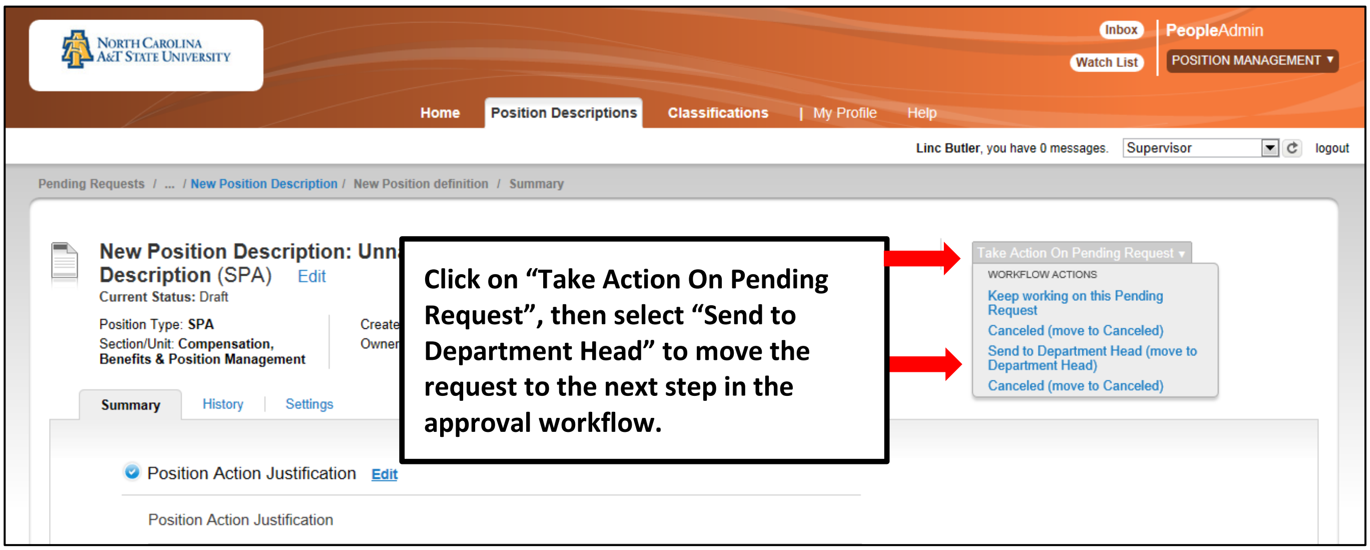
The **Pending Request Summary Tab** allows you to perform a final review all of the position information you've entered on the previous tabs prior to sending the request to the next step in the approval workflow. Please review the details of the position summary carefully before continuing.

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

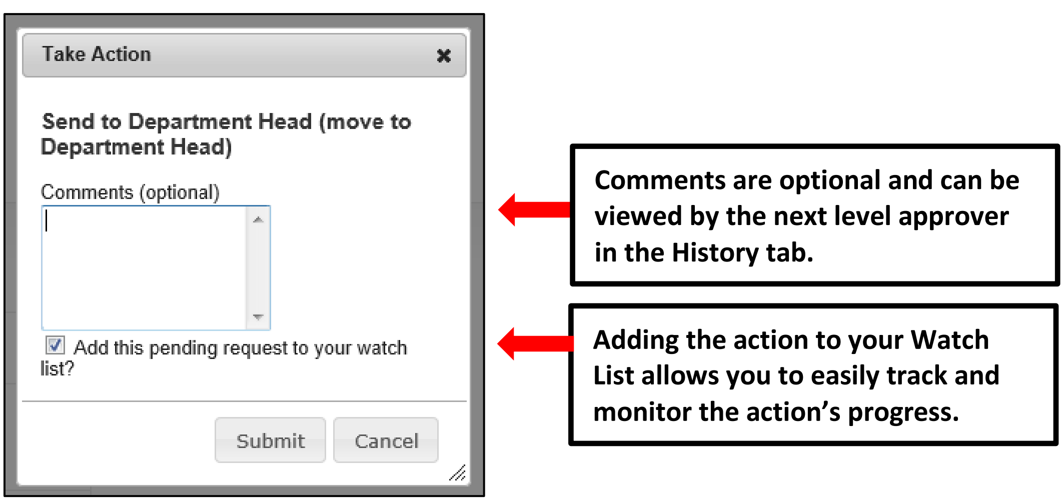


An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save",** and then return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

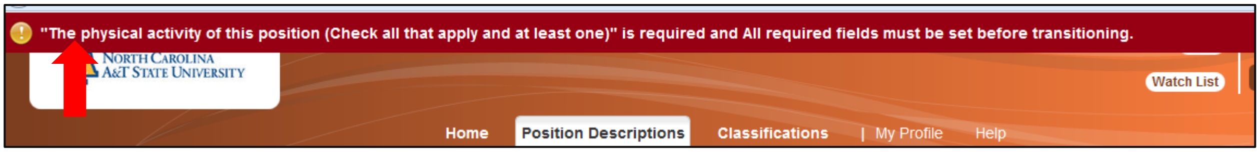
Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example,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



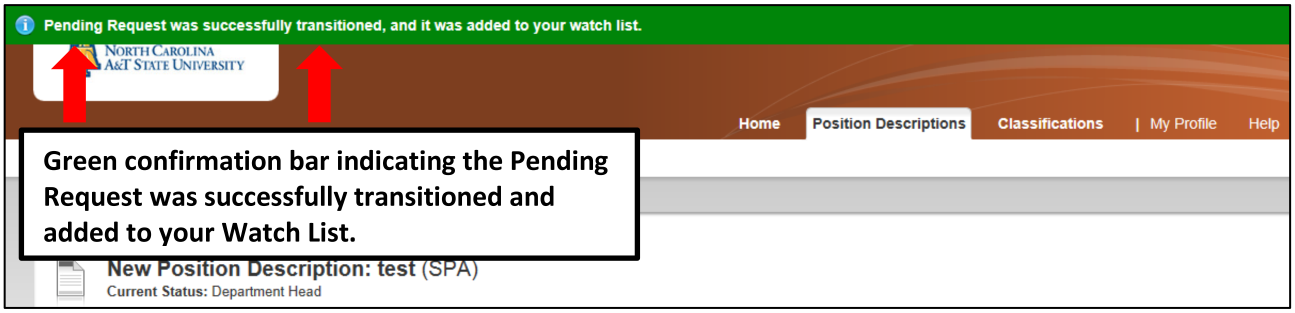
You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send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



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

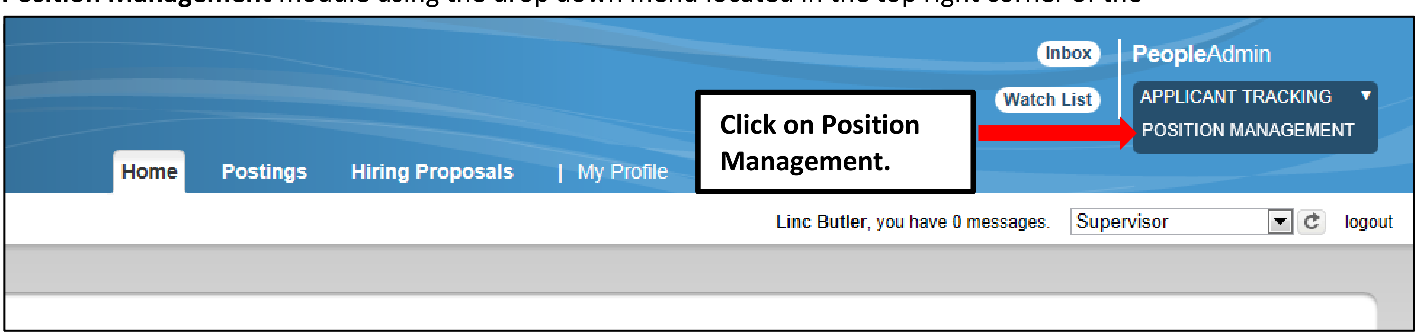


The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if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

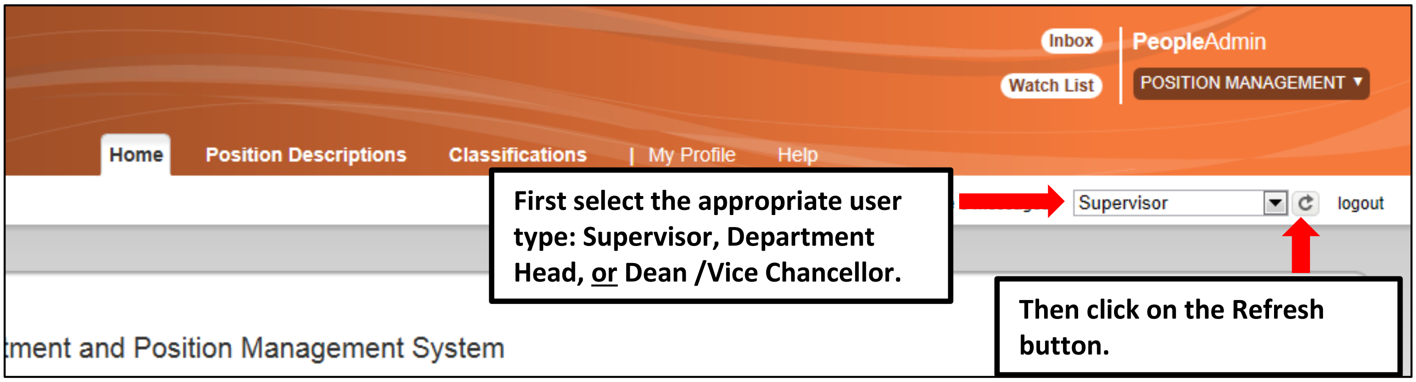
Create New Position Description - EHRA

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.

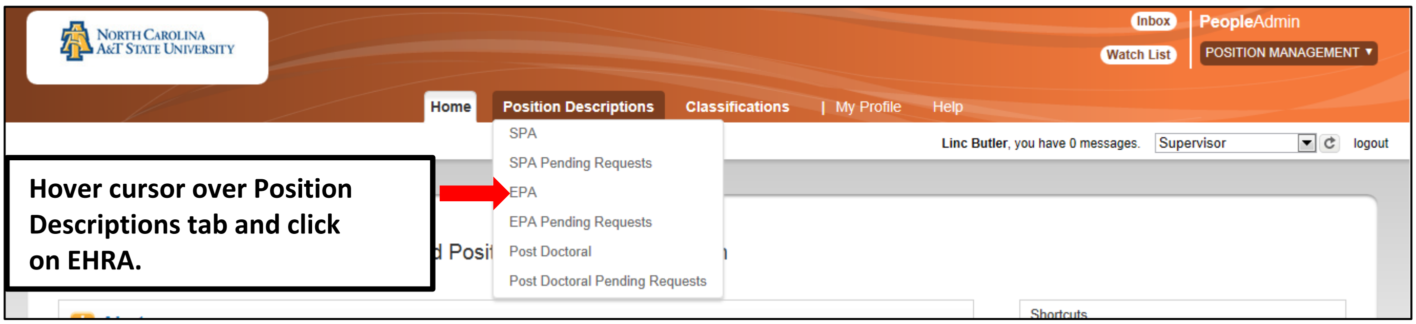
To initiate a **Create New Position Description** request for an EHRA position, first switch to the **Position Management** module using the drop down menu located in the top right corner of the



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 **Create New Position Description** request:



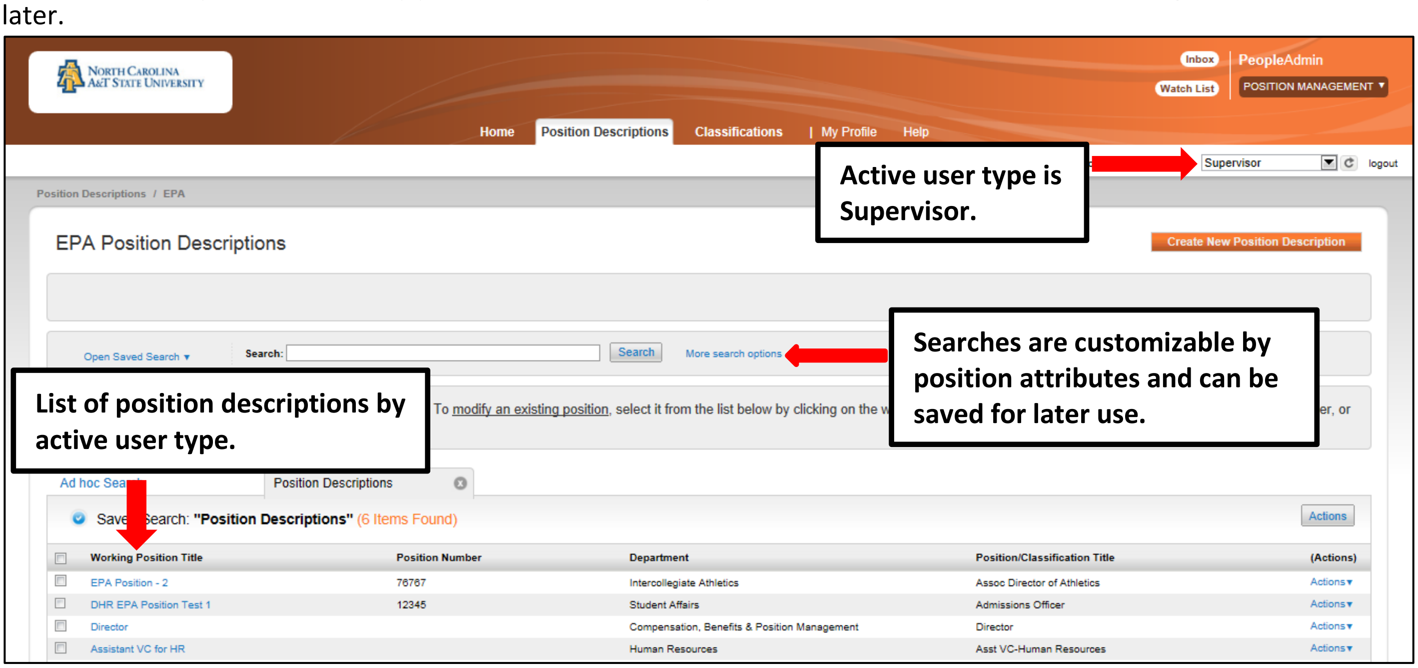
Next, hover your cursor over the **Position Descriptions** tab and click on "EHRA":



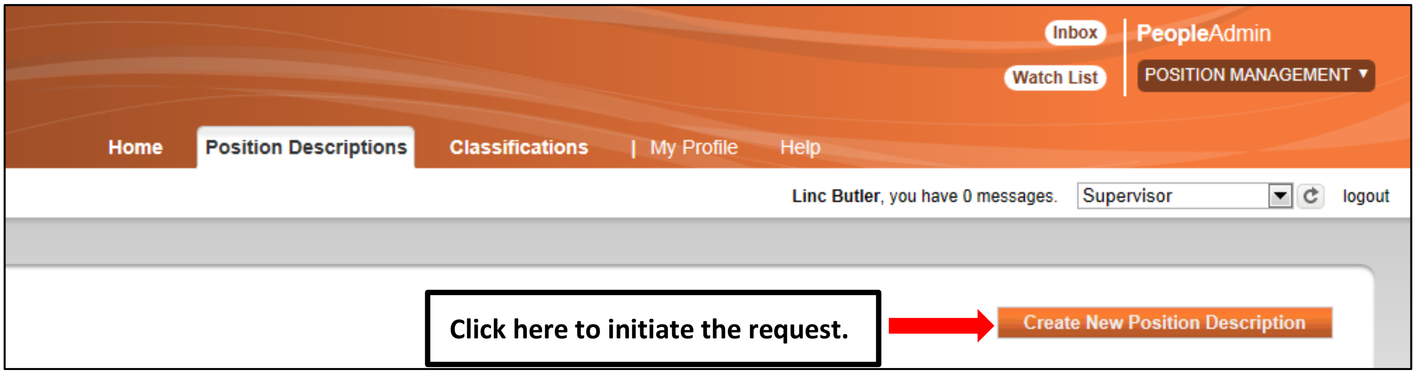
You will then be taken to the **Position Descriptions** view, which provides a list of all position descriptions based on your active user type as follows:

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.

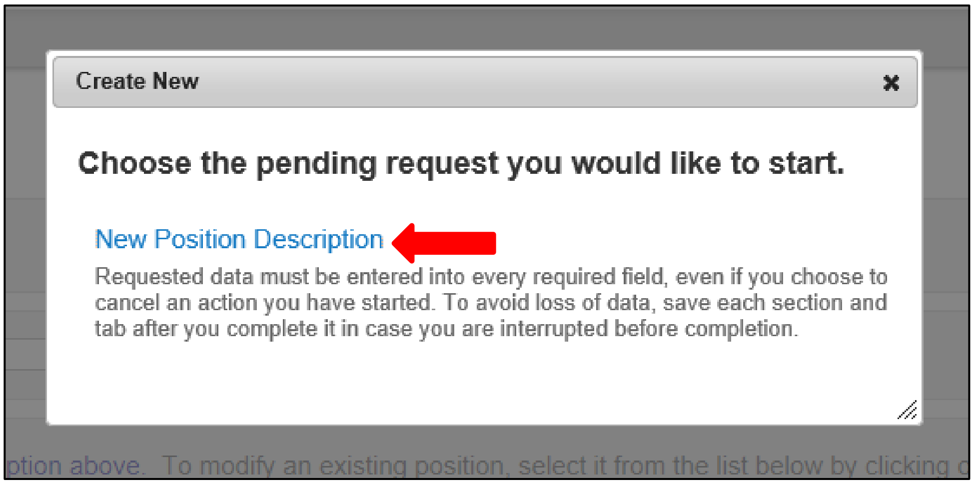
In the **Position Descriptions** view, you can search position descriptions by any number of criteria, including but not limited to position title, position number, employee name, supervisor name, or position status. Searches are fully customizable by position attributes, and you can save custom searches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



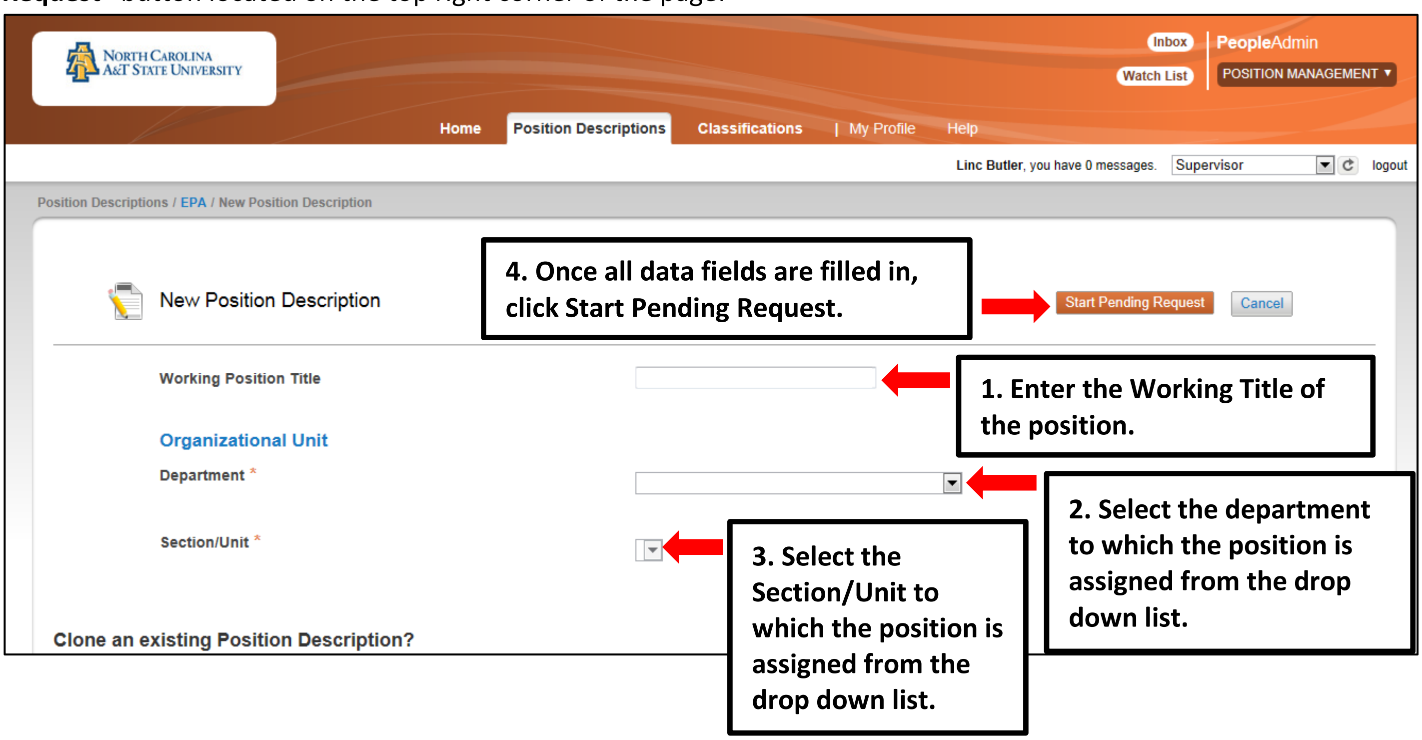
To initiate the request, click on the orange **"Create New Position Description"** button located on the top right of the screen just below the grey bar:



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:

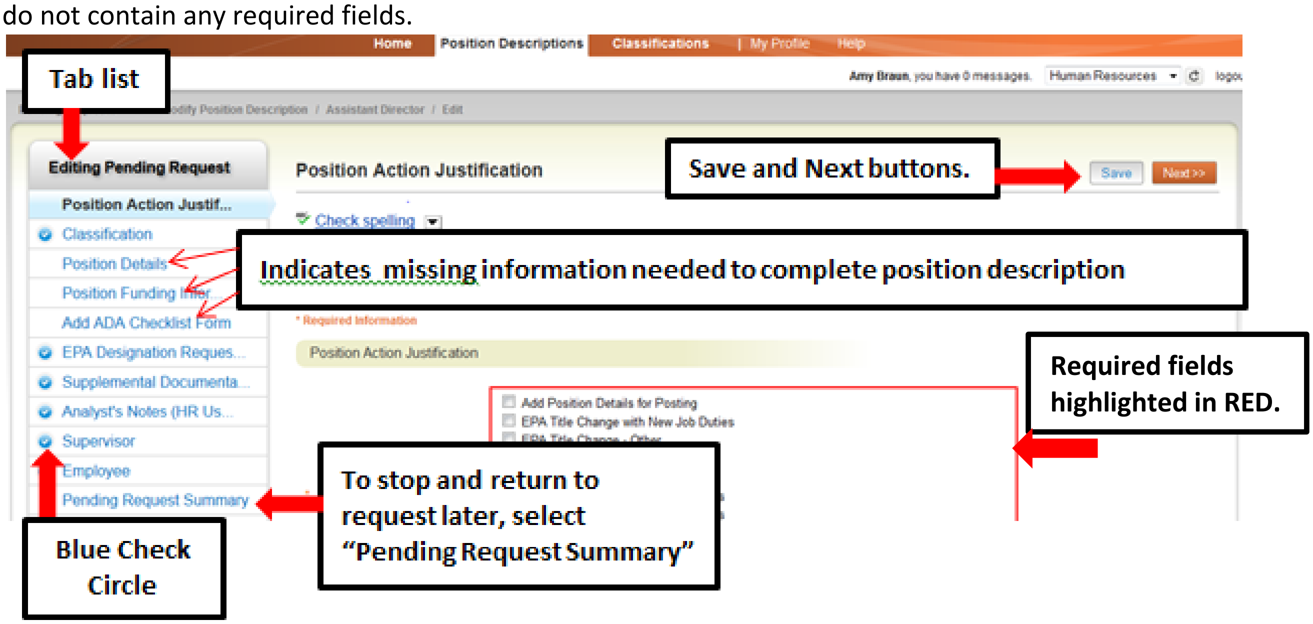


EHRA Create New - Edit Pending Request Page - General Navigation

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.

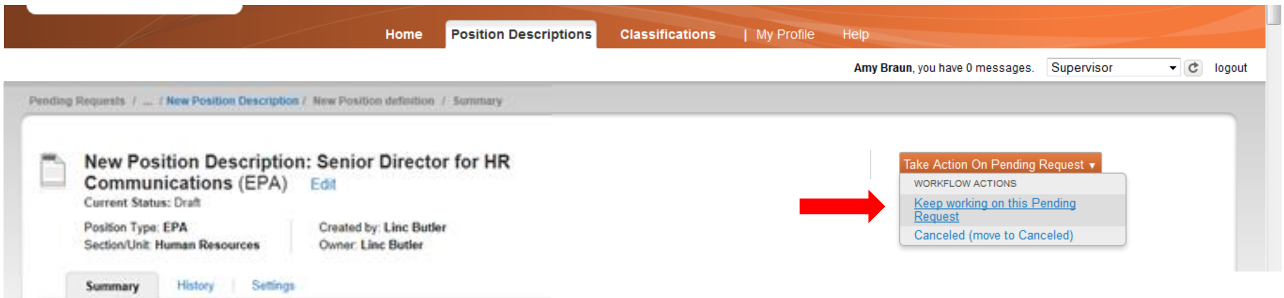
Required fields are highlighted in red and must be filled in before the Position Description can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The Blue Check Circle also appears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



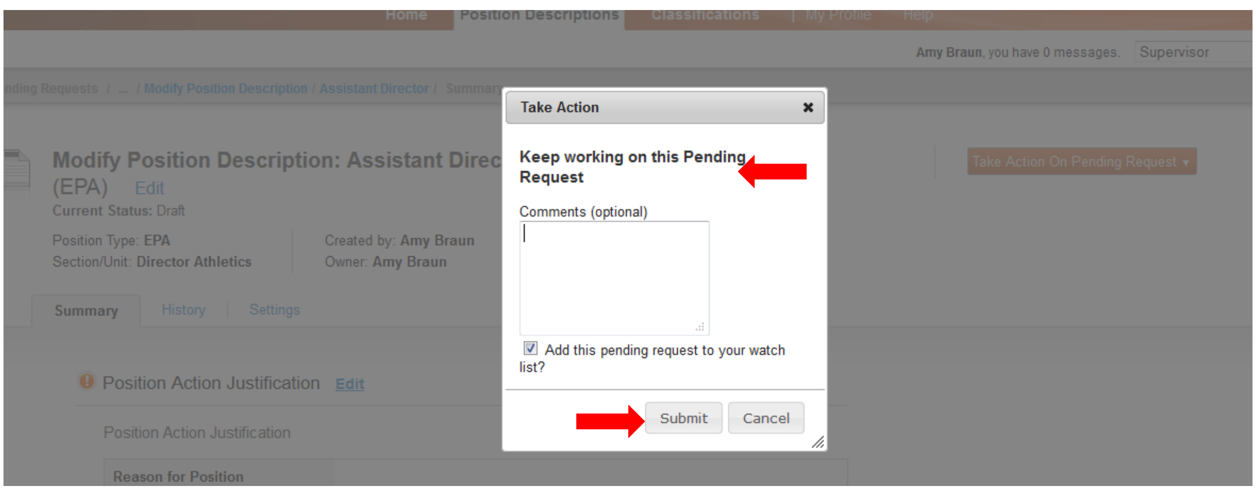
EHRA Create New - Saving to Return to a Pending Request Later

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**"



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

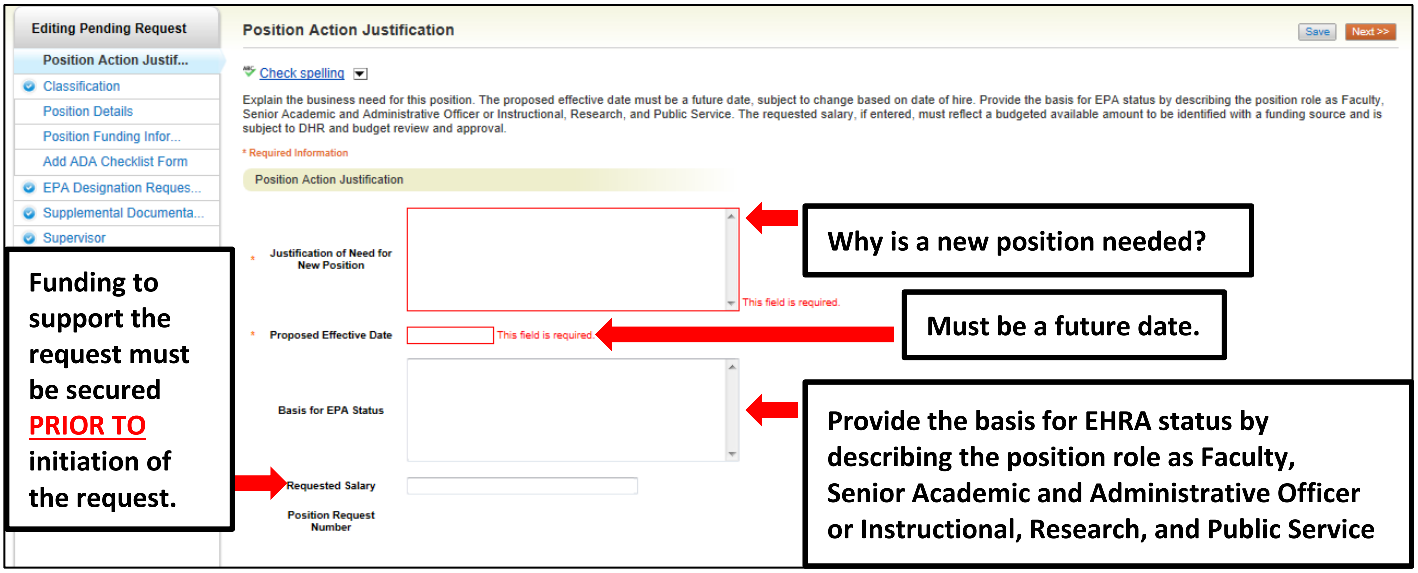


The **Pending Request** on this position description numbers can be located when you log into the Position Description module again as the same **User Type** you used to begin the action. Hover your cursor over the **Position Descriptions tab** and click on "**EHRA Pending Requests**."

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 Next>> button to save changes and navigate to the next tab:

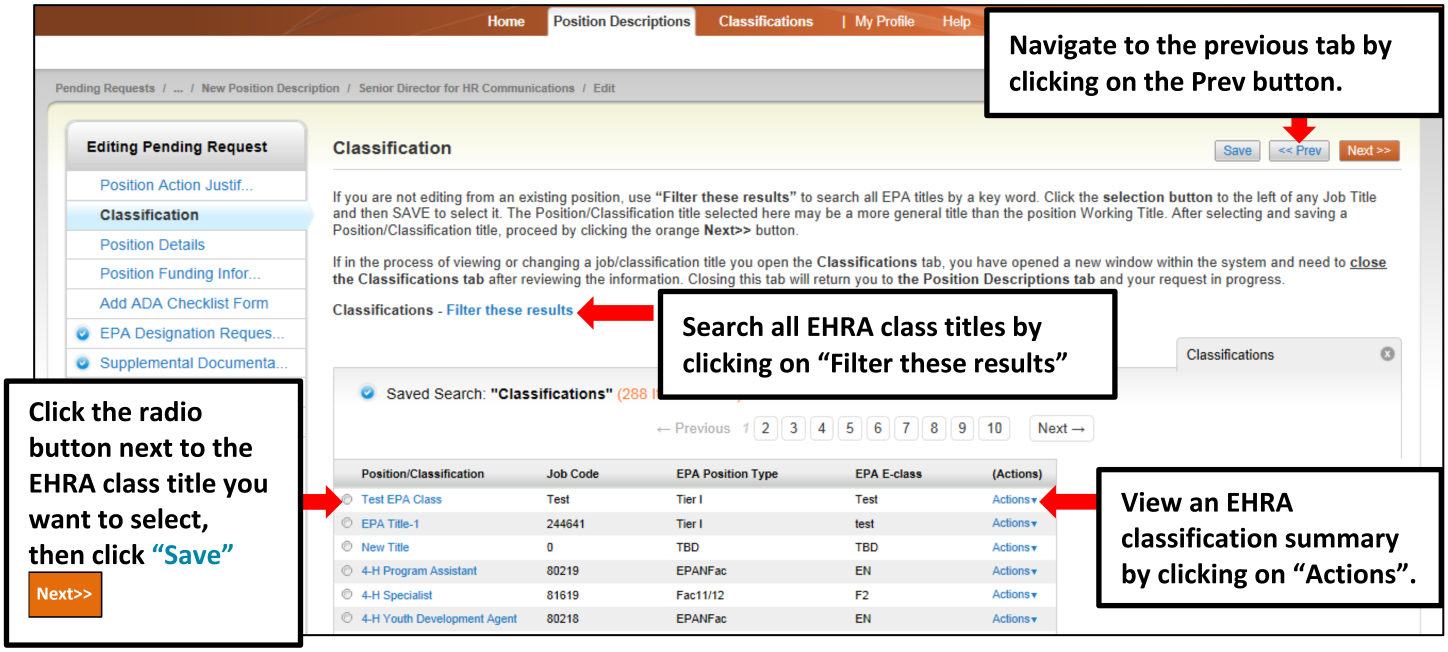


EHRA Create New - Classification Tab

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

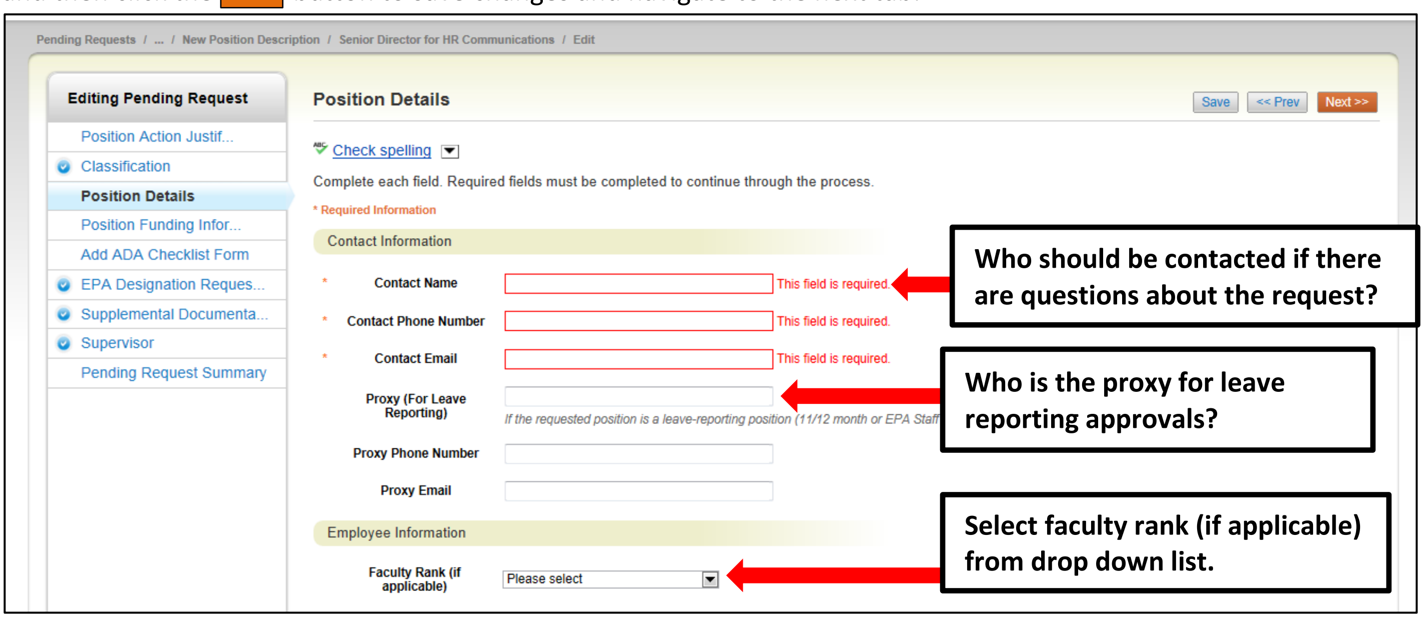
To view a classification summary, click on the "Actions" link next to the classification title you want to view and select "**View Classification.**" To return from the summary, use the Back button located on the top left corner of your web browser. To **select** a classification and proceed with creating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

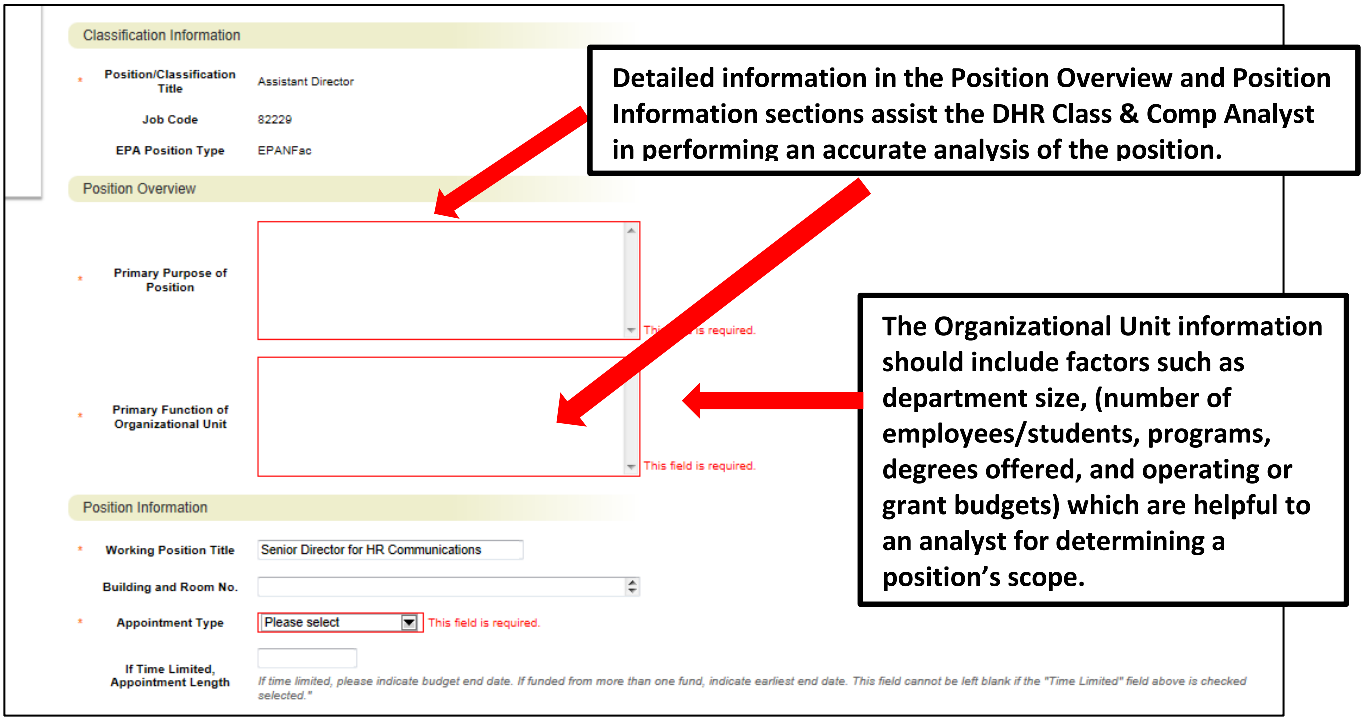
Clicking on the **Position/Classification Title** will open the **View Classification** page in a new tab within your web browser. After reviewing the classification summary information, you will need to close this tab in order to return to the **Classification** tab and your request in progress. **PLEASE 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:



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:





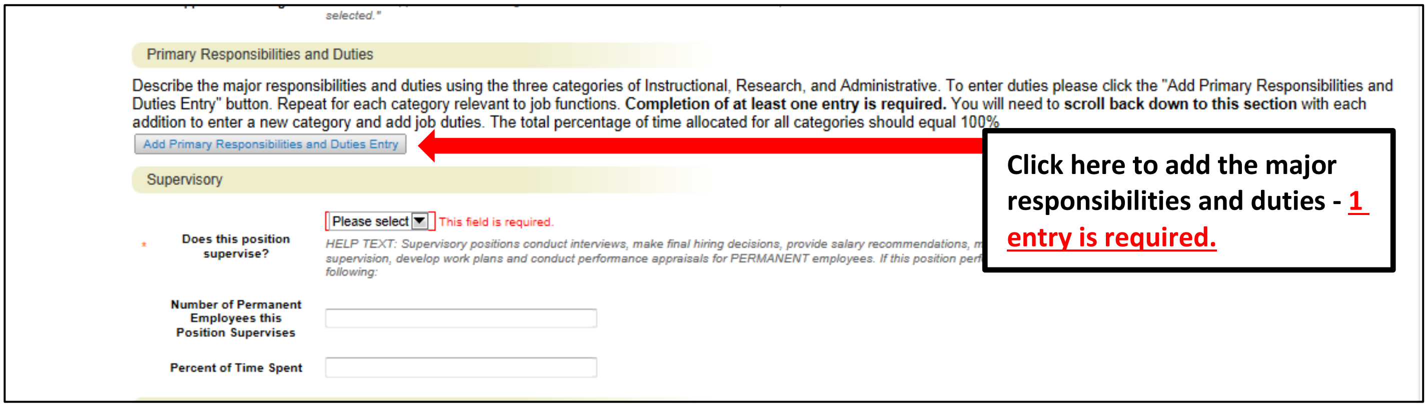
EHRA Create New – Position Details Tab – Primary Responsibilities and Duties

The next section of the Position Details tab is used to build **current duties and responsibilities** into the position. It is the *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.

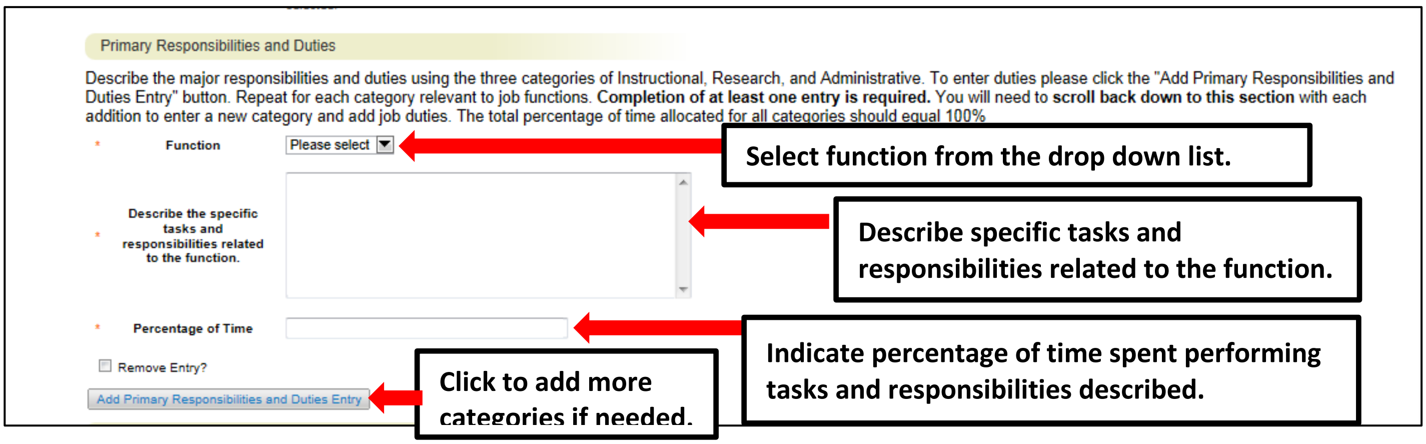
On an EHRA position **at least one of** the three categories of Instructional, Research, and Administrative must be selected to describe the primary responsibilities of the job. Many EHRA jobs may be comprised of a combination of duties in more than one of these categories, but entry of only one will 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 Primary Responsibilities and Duties Entry button is clicked; you are taken back to the top of the Position Details Tab and will need to ***scroll down*** 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%:

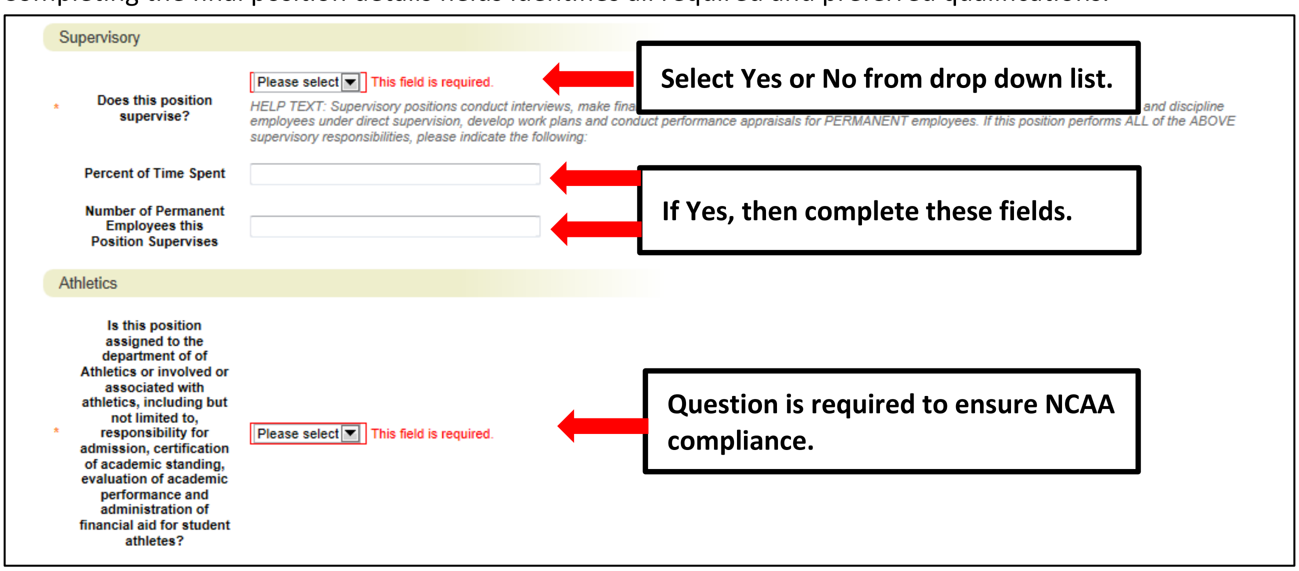


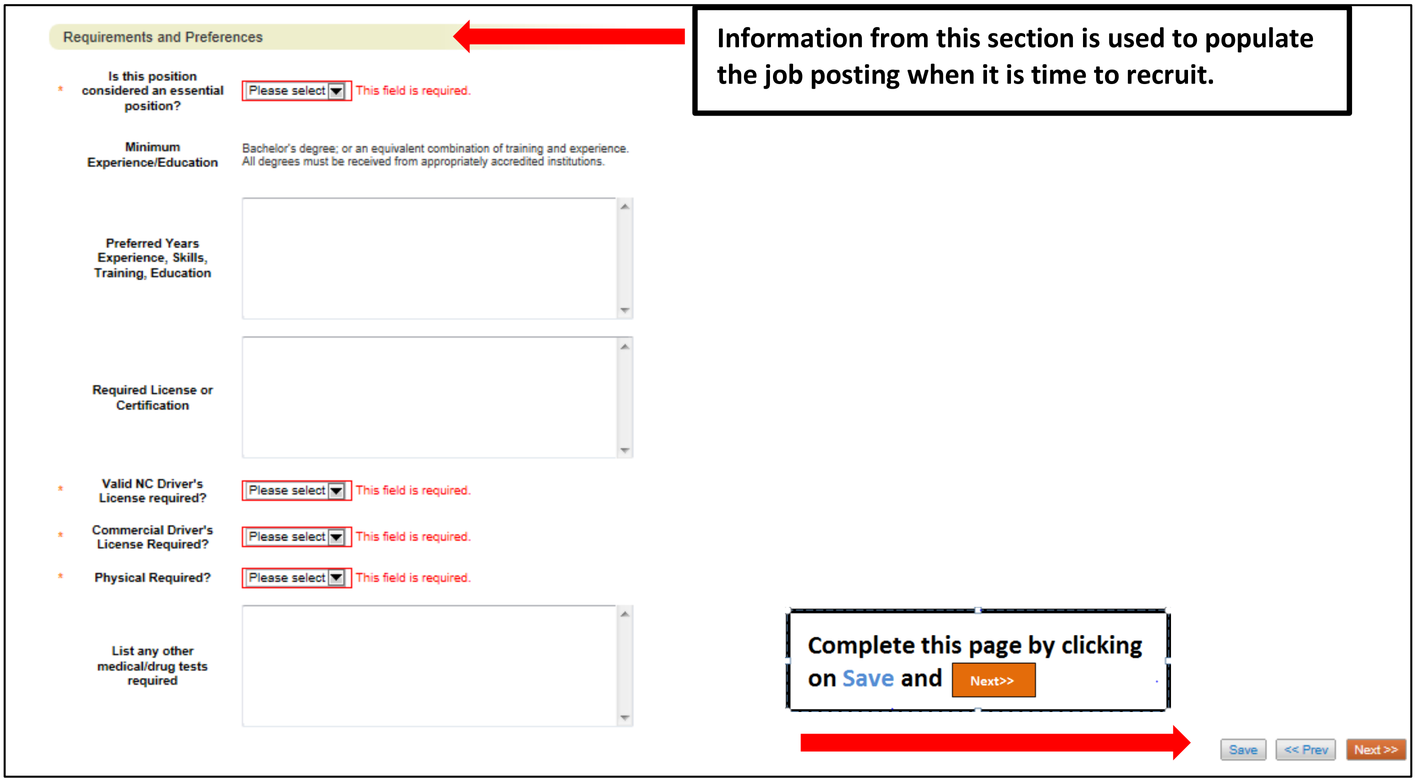
Clicking Add Primary Responsibilities and Duties Entry opens this section to enable entry of duties:



EHRA Create New – Position Details – Compliance and Requirements

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



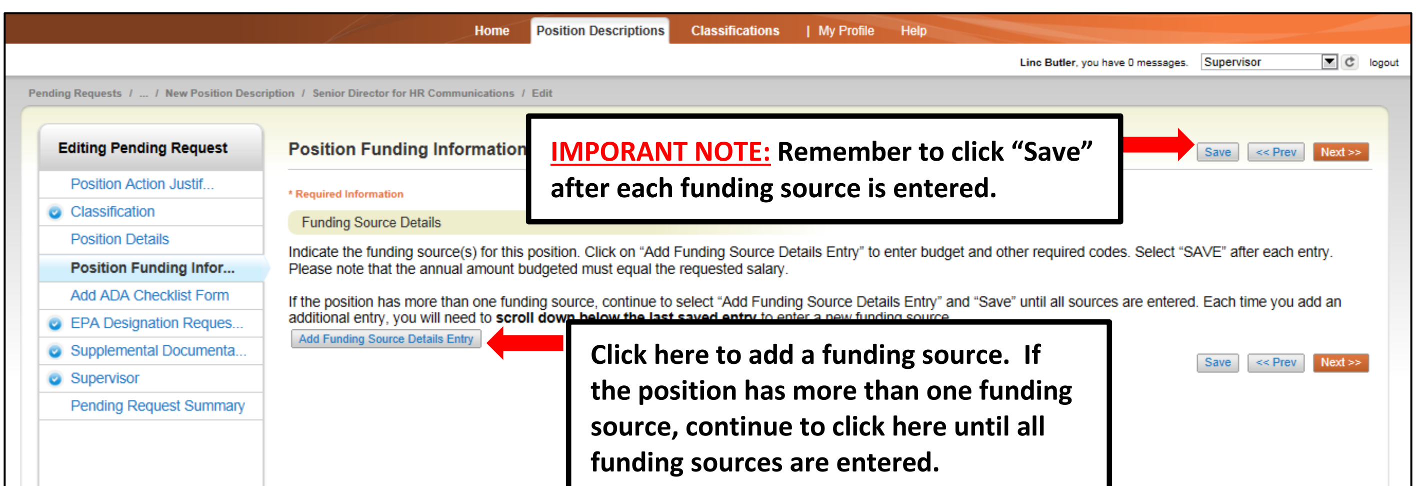


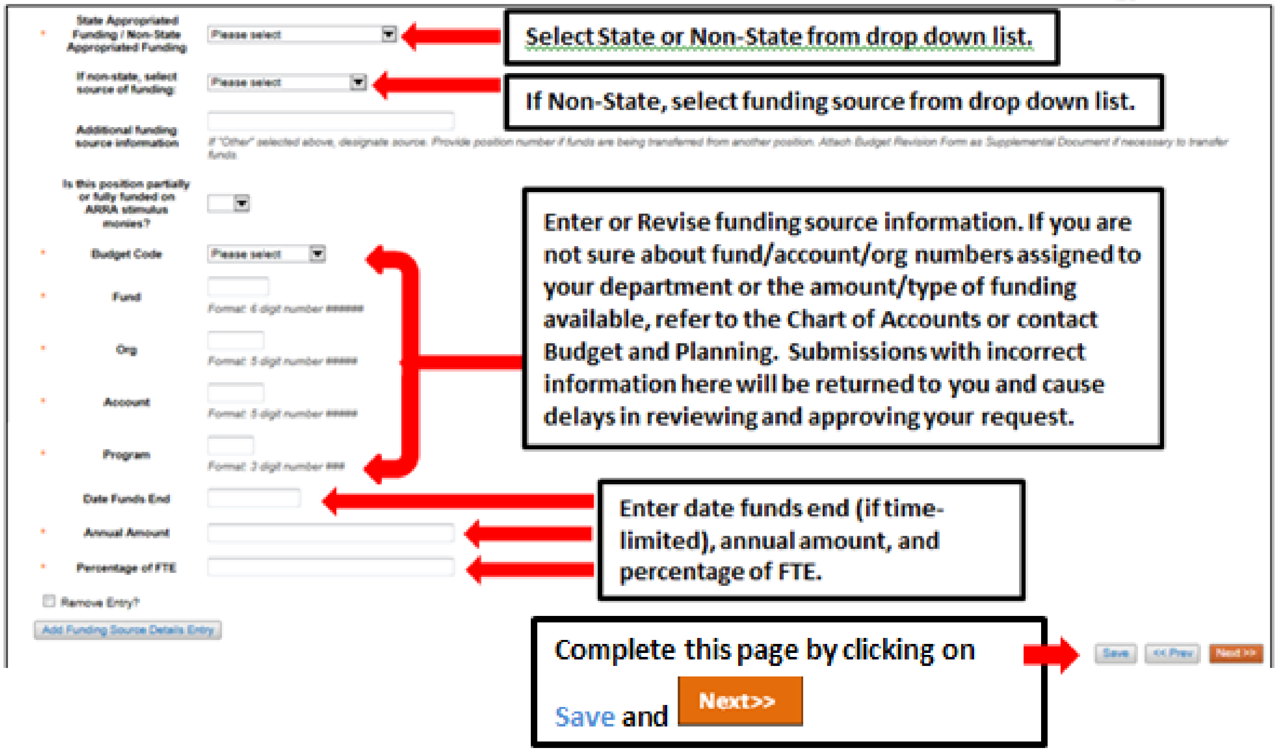
EHRA Create New - Position Funding Information Tab

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 **Next>>** to move to the next tab:



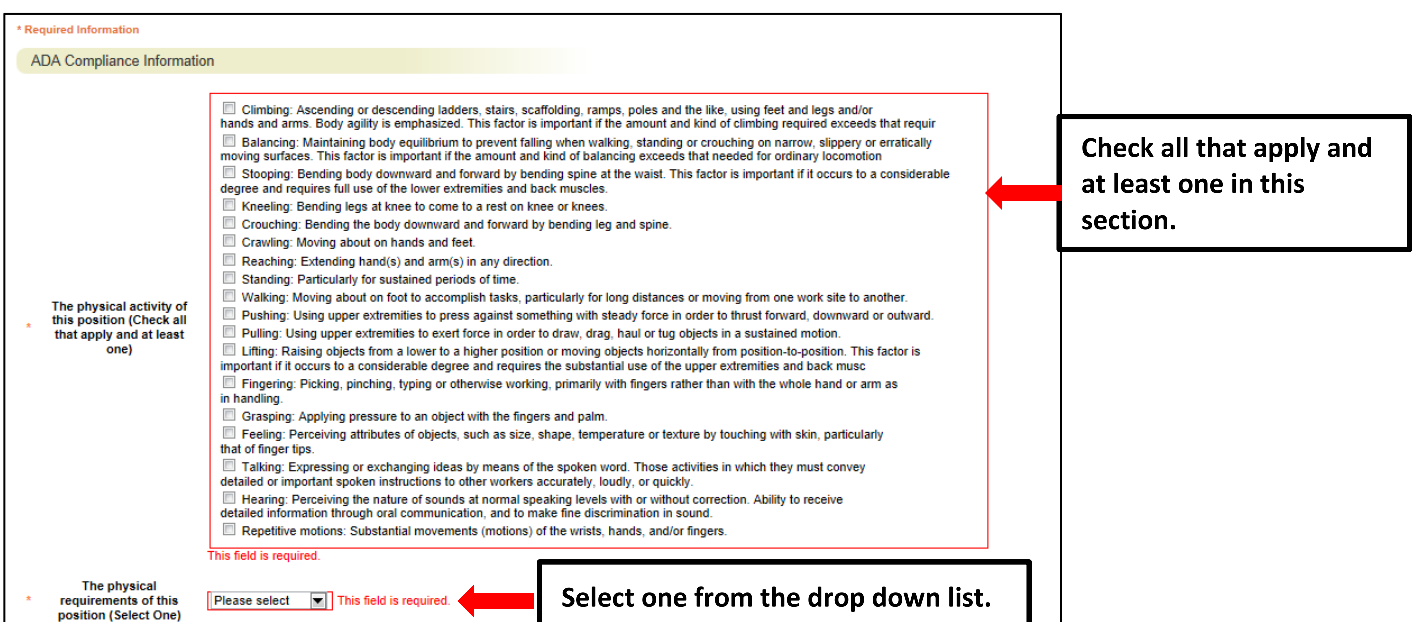


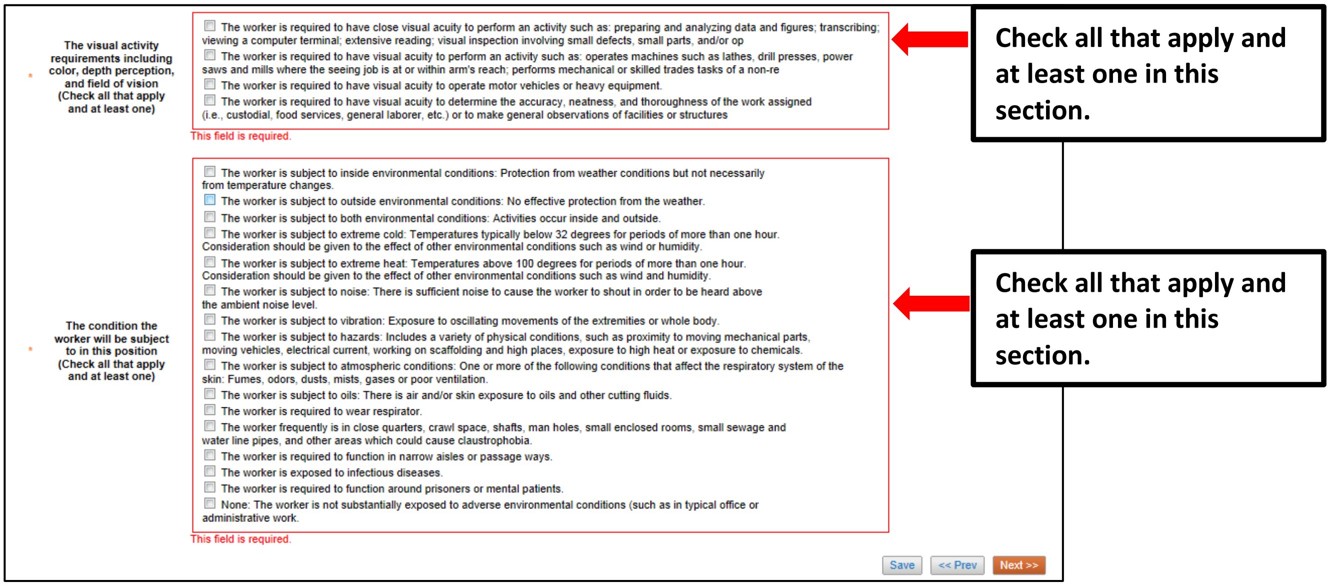
EHRA Create New - Add ADA Checklist Form Tab

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:

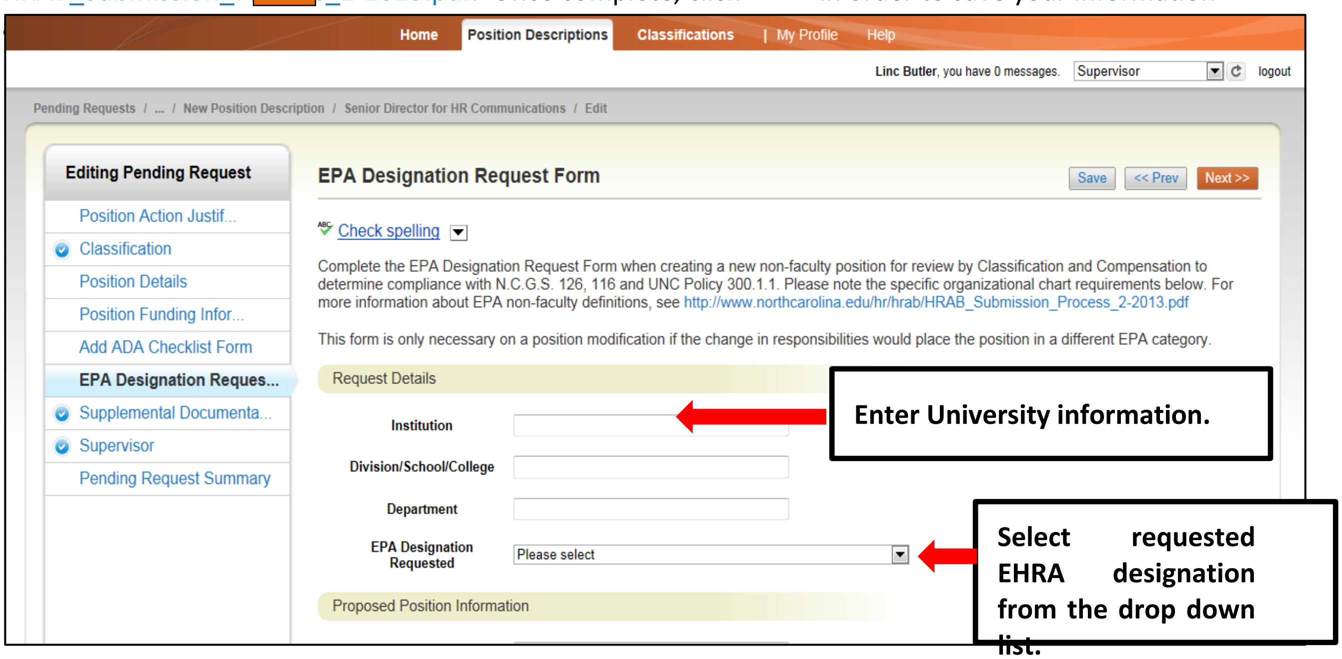
- The physical activity of the position (Check all that apply and at least one)
- The physical requirements of the position (Select one from the drop down list)
- The visual activity requirements including color, depth perception, and field of vision (Check all that apply and at least one)
- The condition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

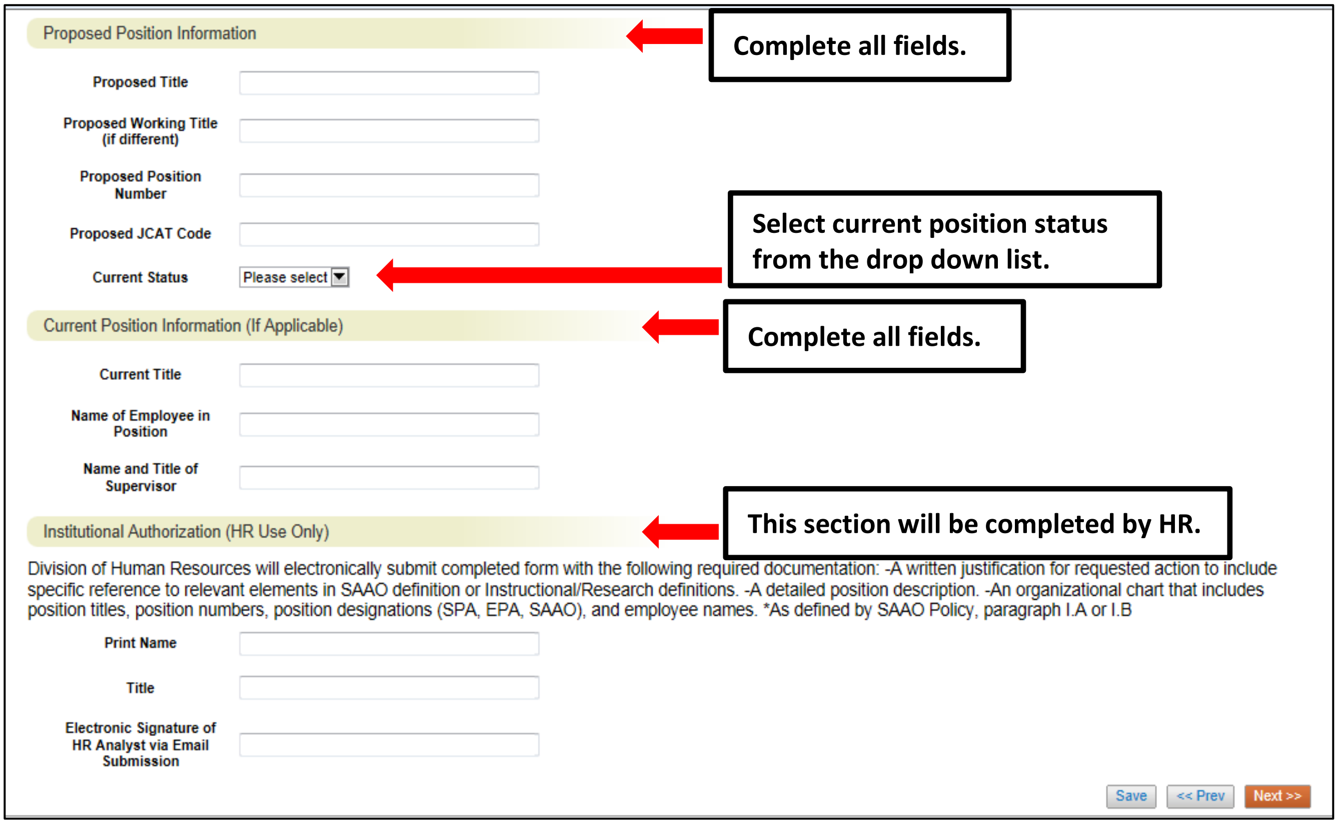




EHRA Create New – EHRA Designation Request Form Tab

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/HRAB_Submission_P s_2-2013.pdf. Once complete, click in order to save your information



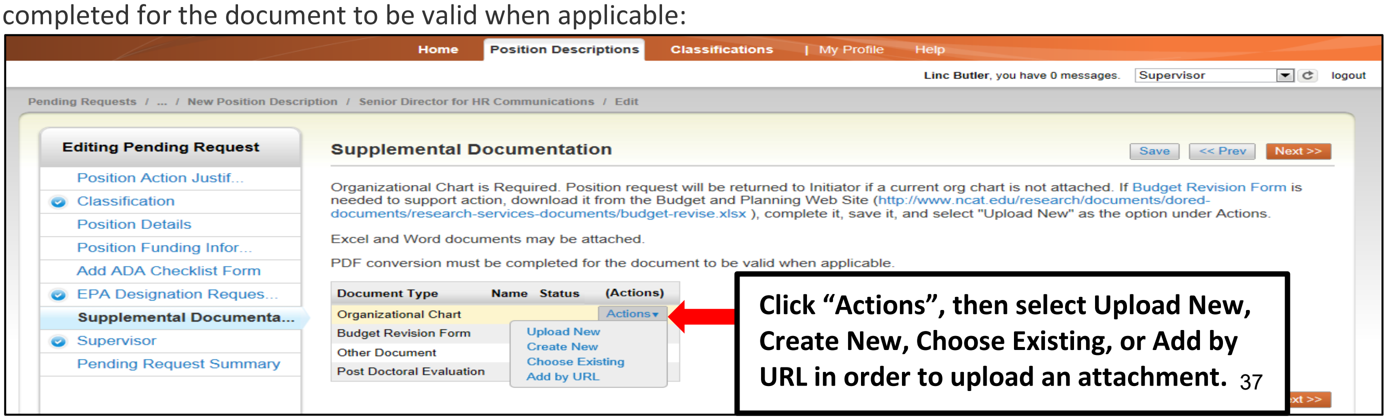


EHRA Create New - Supplemental Documentation Tab

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:

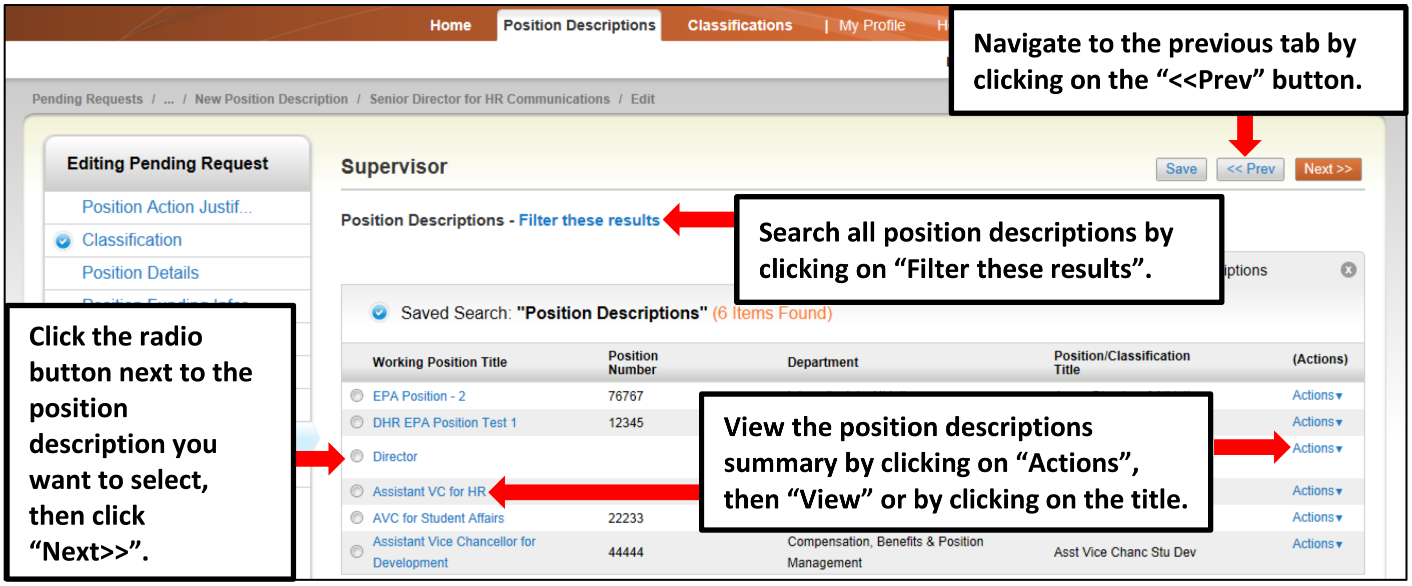


EHRA Create New - Supervisor Tab

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 *different* Position Type (for example EHRA supervising SHRA), click on "**Filter these results**" and select the Position Type to which the supervisor of the position belongs. Then click on "**Search**" to access the list of supervisors in the selected Position Type.

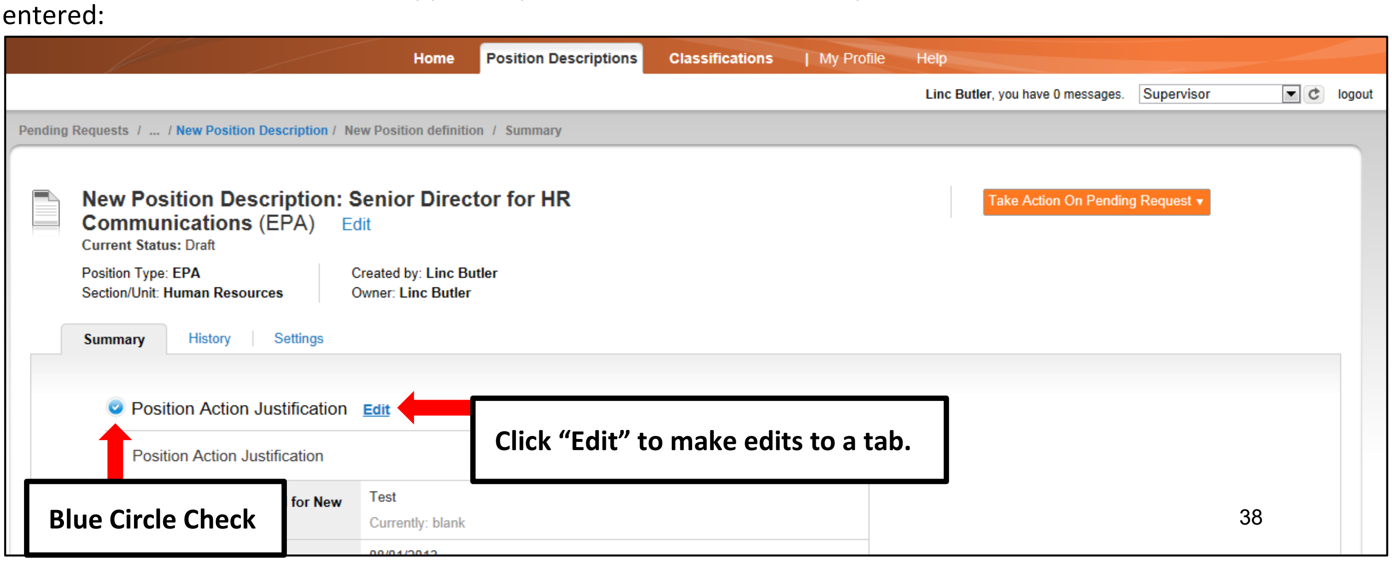
To view one of the position descriptions in the list, click on the **"Actions"** link next to the classification title you want to view and select "**View**", or click on the **Working Position Title.** To return from the summary, use the Back button located on the top left corner of your web browser. 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 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):

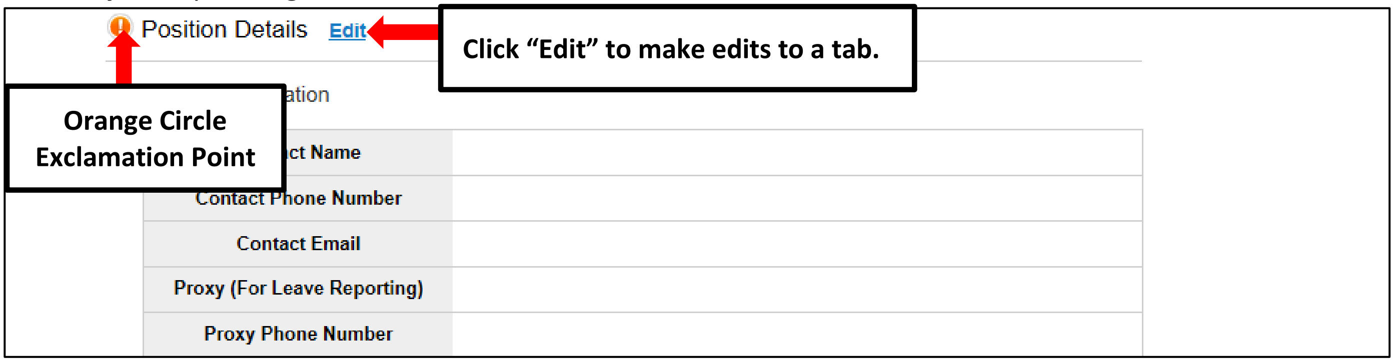


EHRA Create New - Pending Request Summary Tab

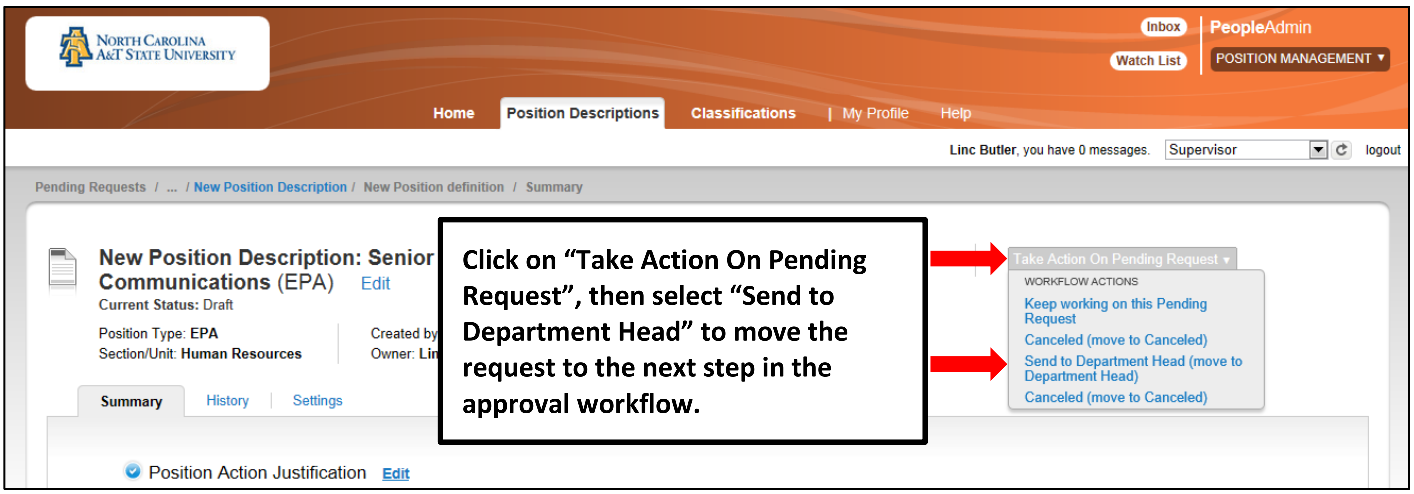
The **Pending Request Summary Tab** allows you to perform a final review all of the position information you've entered on the previous tabs prior to sending the request to the next step in the approval workflow. The **Blue Circle Check** appears by those tabs for which all required information has been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



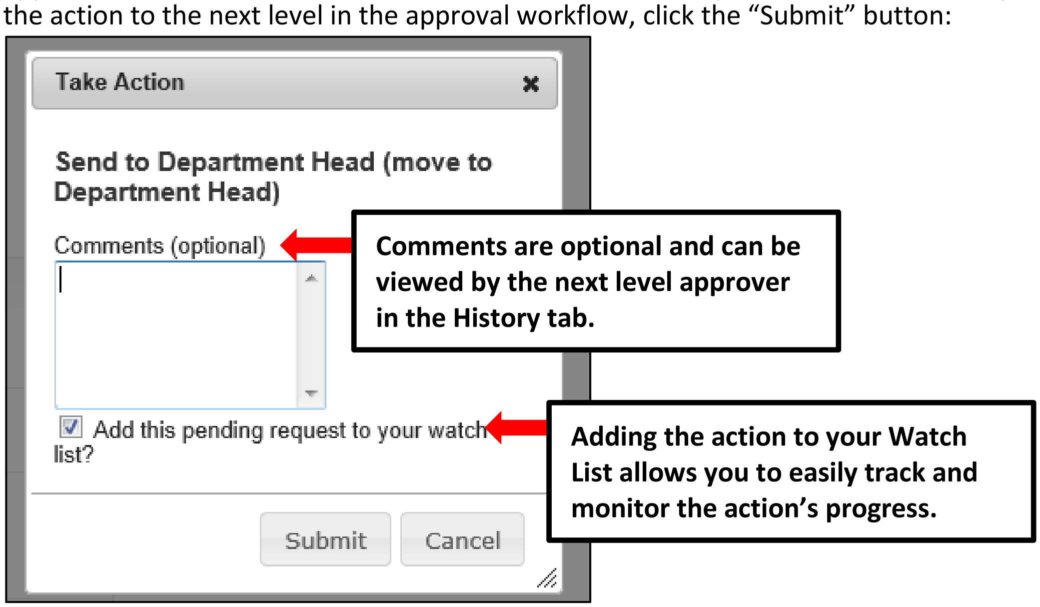
An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save",** and then return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



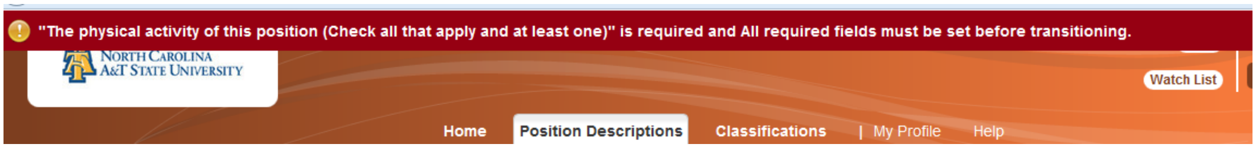
Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example,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



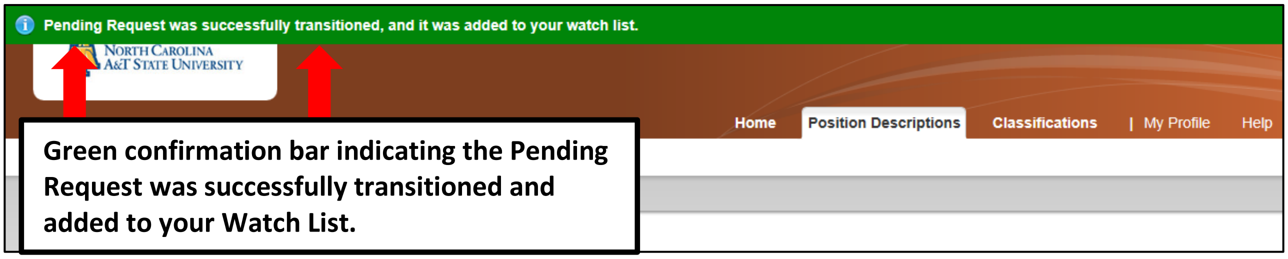
You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable in the History tab by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When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



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



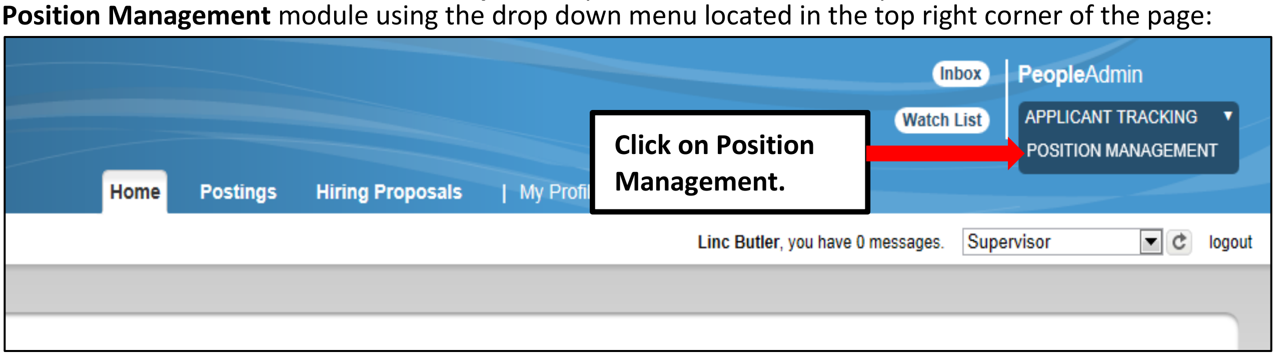
The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if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

Create New Position Description – Post Doctoral

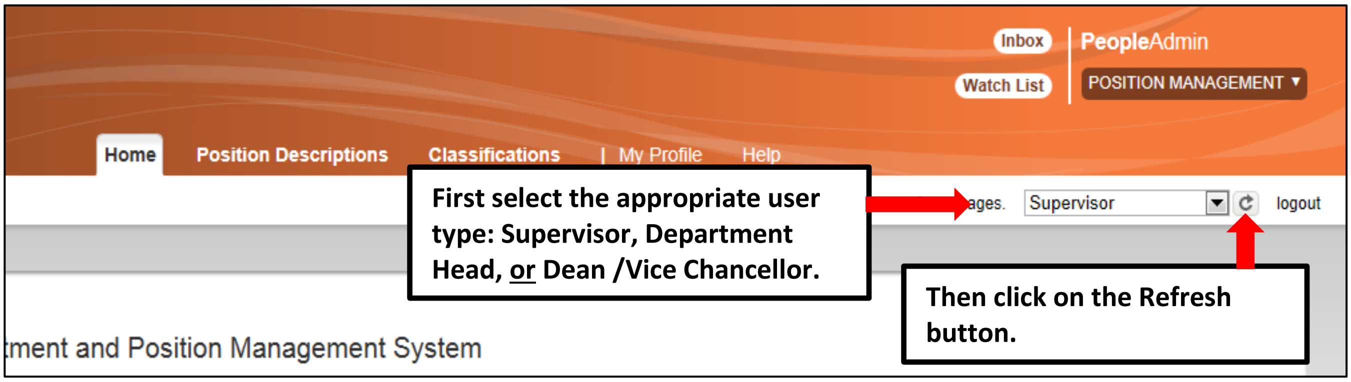
IMPORTANT NOTE: Prior to establishing and hiring for a Postdoctoral Associate position, Principal Investigators (PI) should review the Postdoctoral Scholars Policy. Approval for program participation and proposed postdoc positions must be granted by the Vice Chancellor for the Division of Research and 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 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.

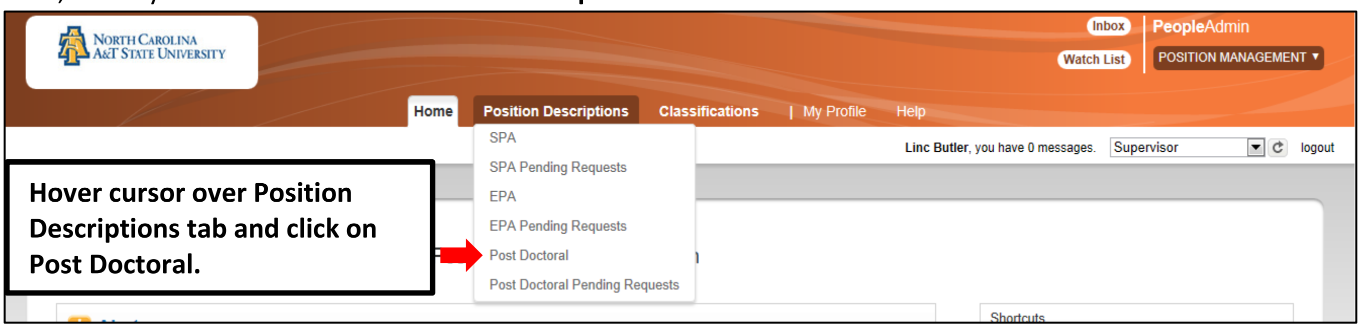
To initiate a **Create New Position Description** request for a Post Doctoral position, first switch to the **Position Management** module using the drop down menu located in the top right corner of the page:



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 **Create New Position Description** request:



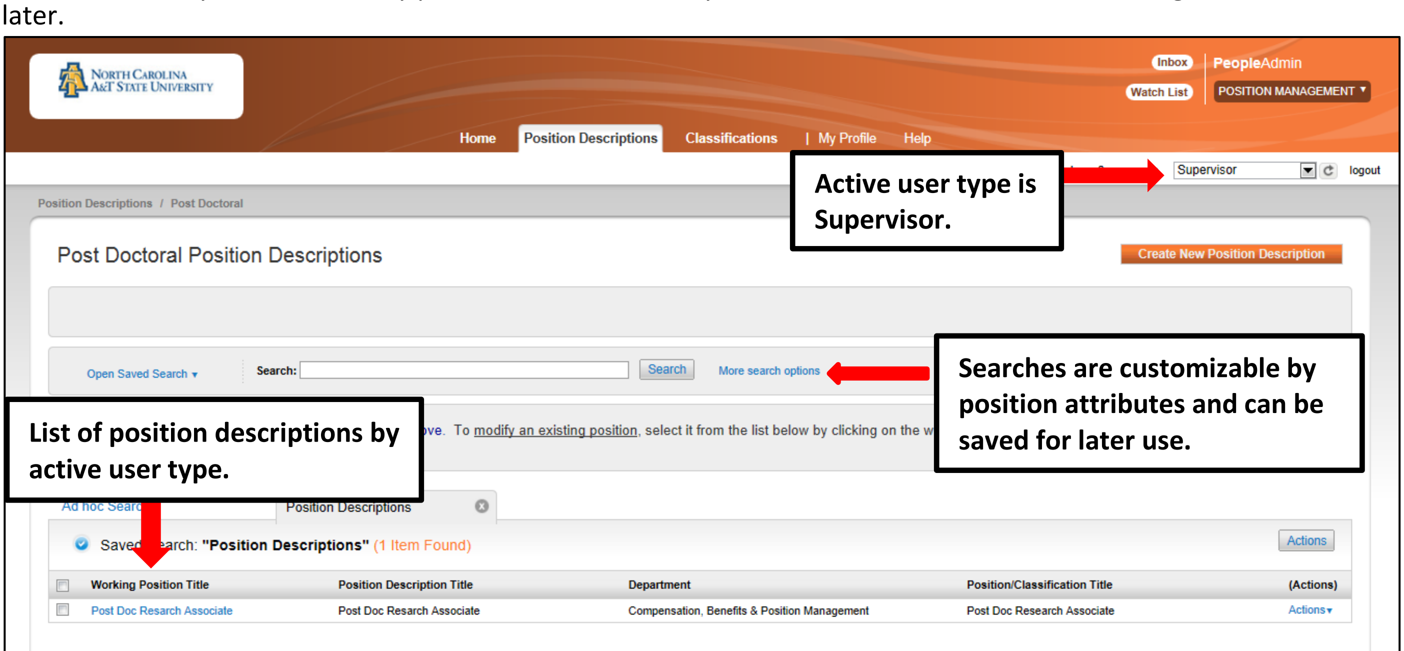
Next, hover your cursor over the **Position Descriptions** tab and click on "Post Doctoral":



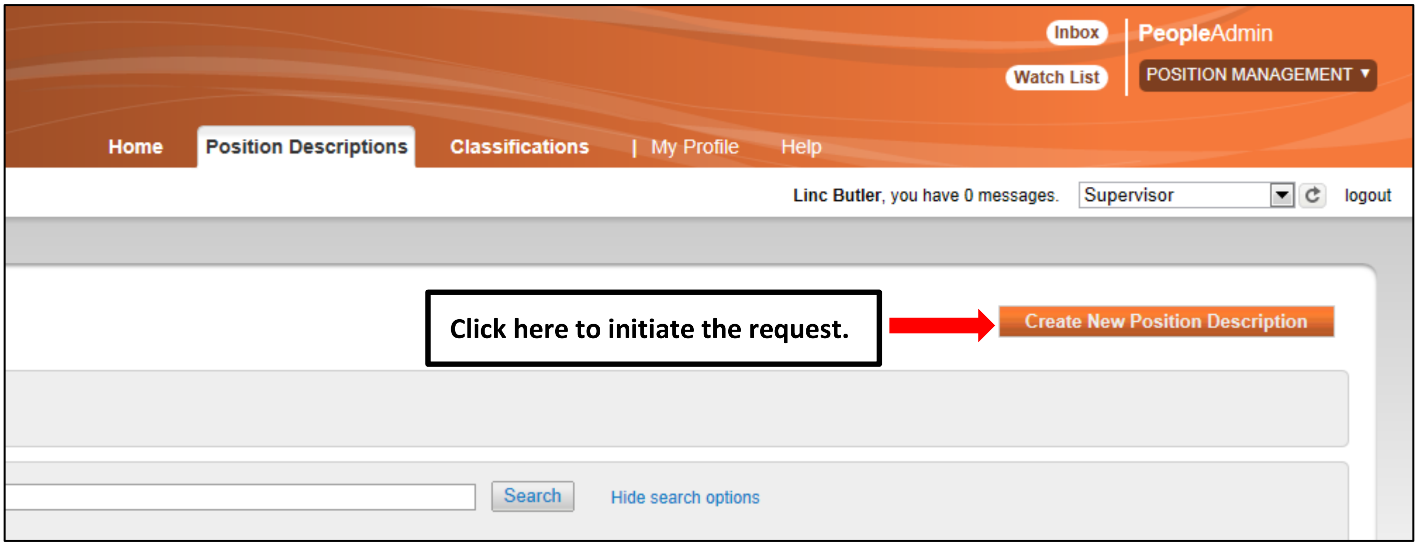
You will then be taken to the **Position Descriptions** view, which provides a list of all position descriptions based on your active user type as follows:

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.

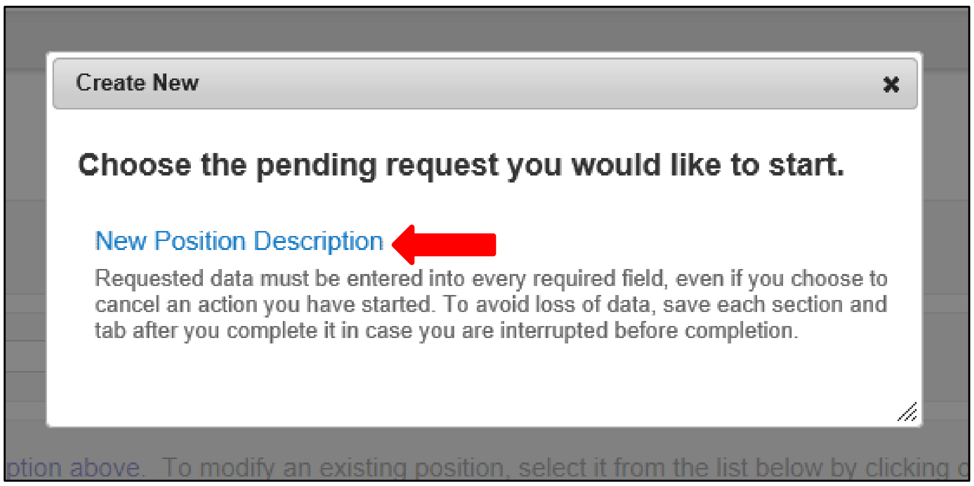
In the **Position Descriptions** view, you can search position descriptions by any number of criteria, including but not limited to position title, position number, employee name, supervisor name, or position status. Searches are fully customizable by position attributes, and you can save custom searches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



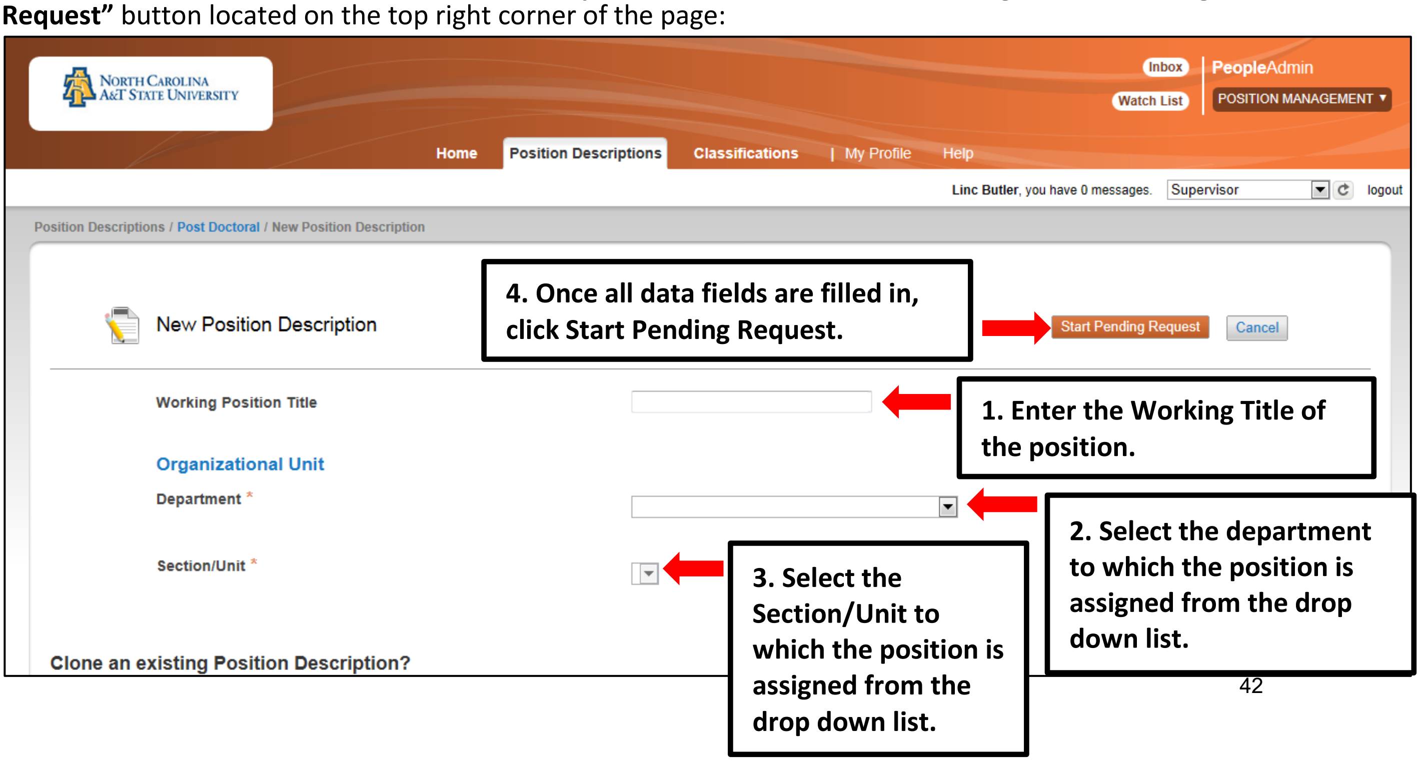
To initiate the request, click on the orange **"Create New Position Description"** button located on the top right of the screen just below the grey bar:



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:

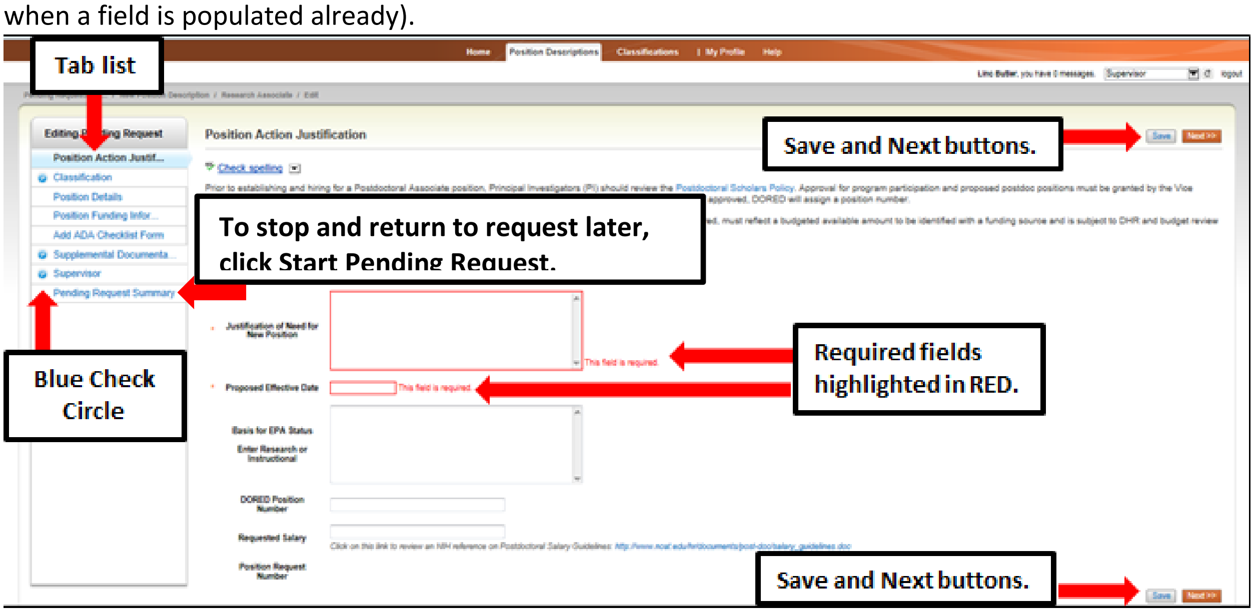


Post Doctoral Create New - Edit Pending Request Page - General Navigation

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).

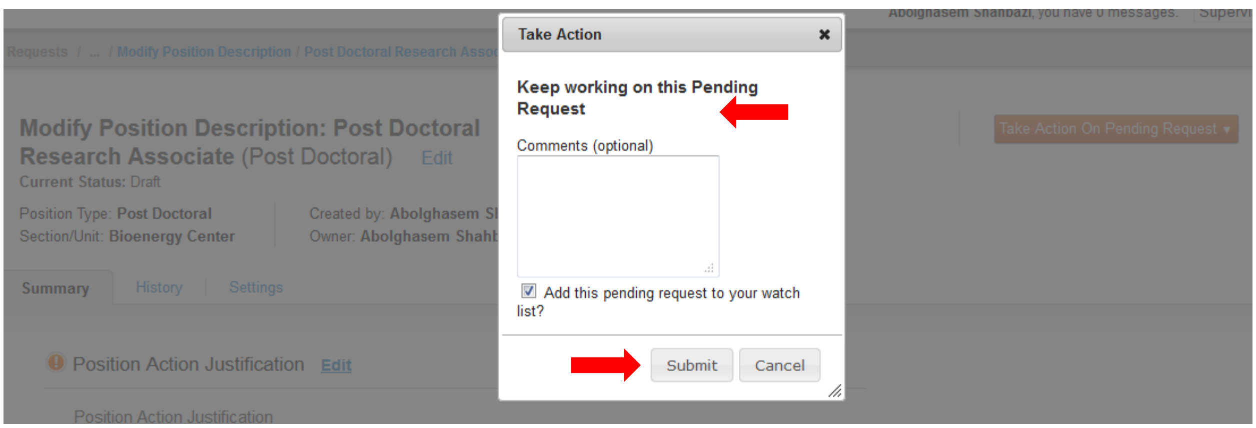


Post Doctoral Create New - Saving to Return to a Pending Request Later

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 desired
5) Click "Submit"



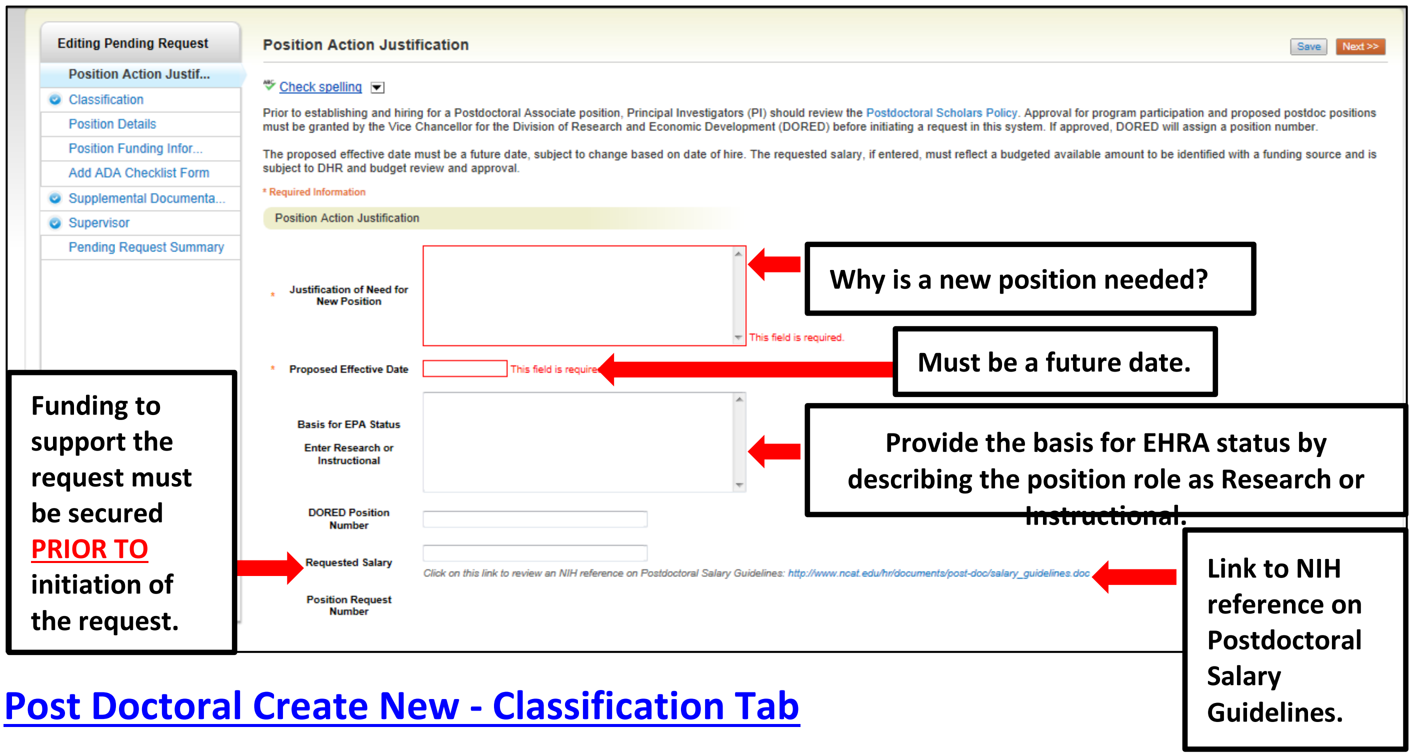
The **Pending Request** on this position description numbers can be located when you log into the Position Description module again as the same **User Type** you used to begin the action. Hover your cursor over the **Position Descriptions tab** and click on "**SHRA Pending Requests**."

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.

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 Next>> button to save changes and navigate to the next tab:

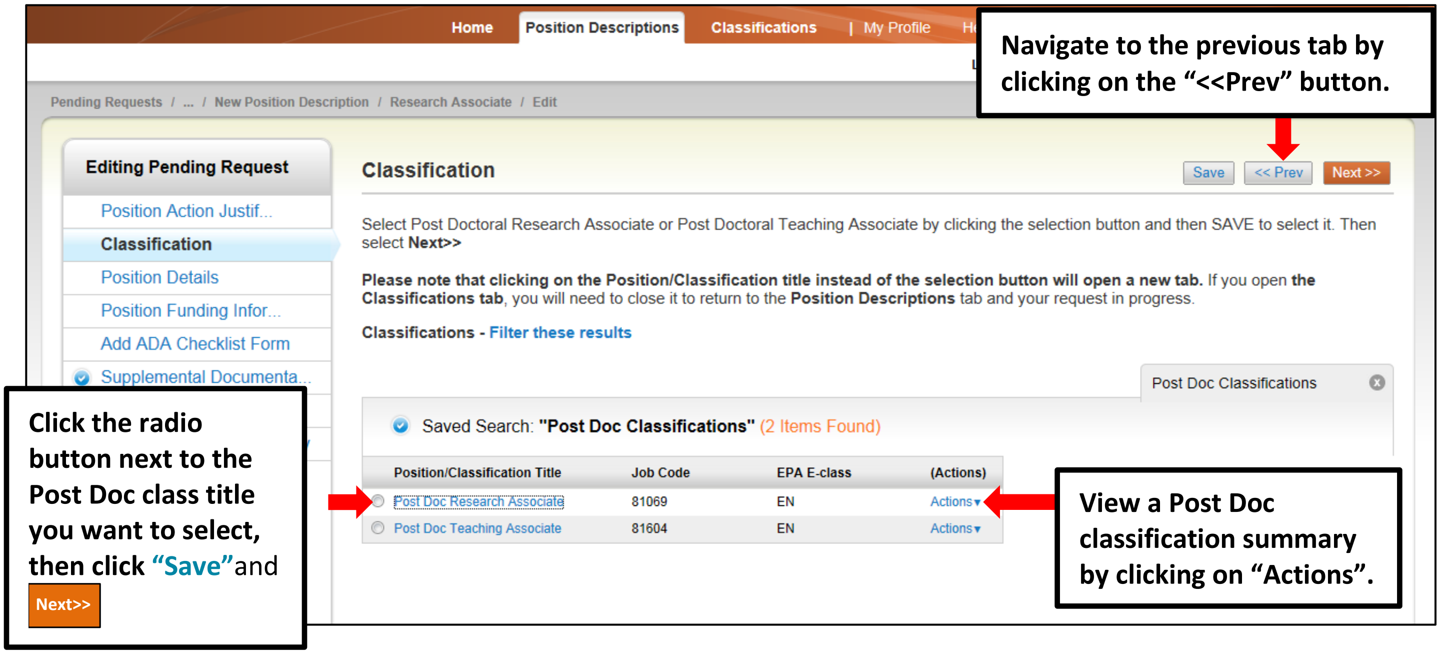


Post Doctoral Create New - Classification Tab

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 Next>> ton located on both the top and bottom right-hand corners of the page.

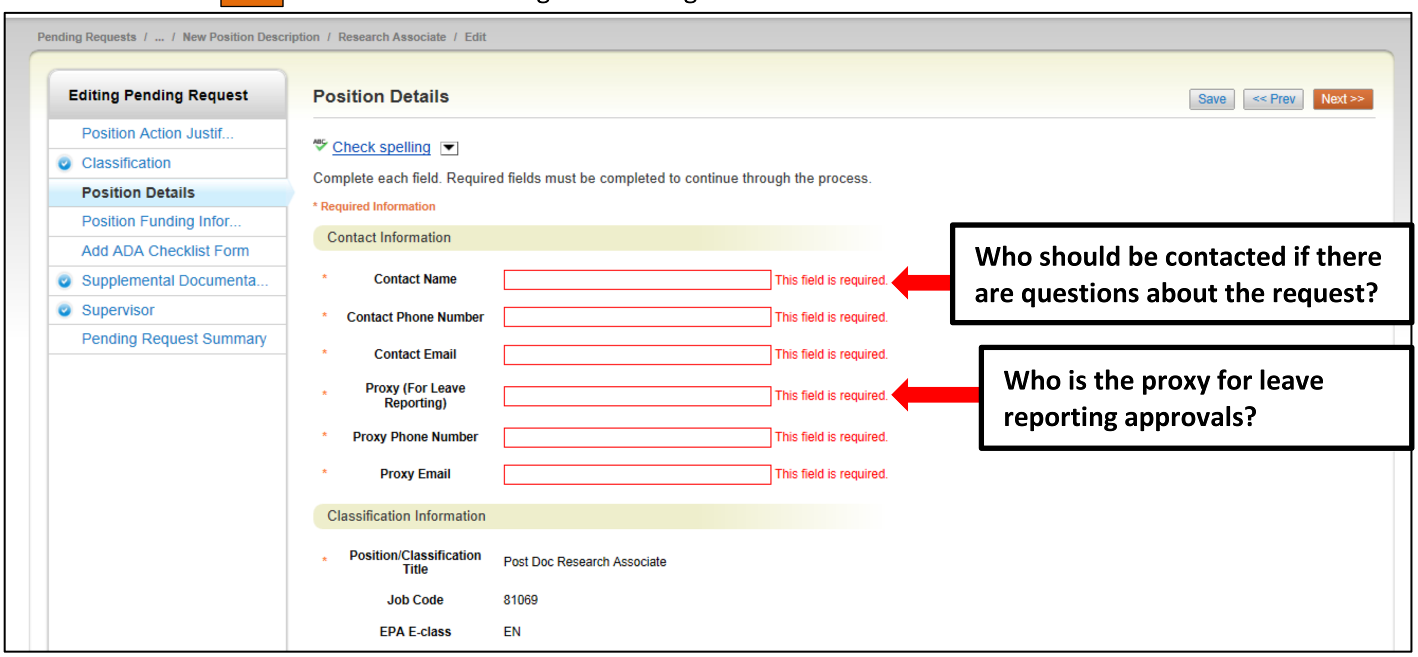
To view a classification summary, click on the "Actions" link next to the classification title you want to view and select **View Classification.** To return from the summary, use the Back button located on the top left corner of your web browser.

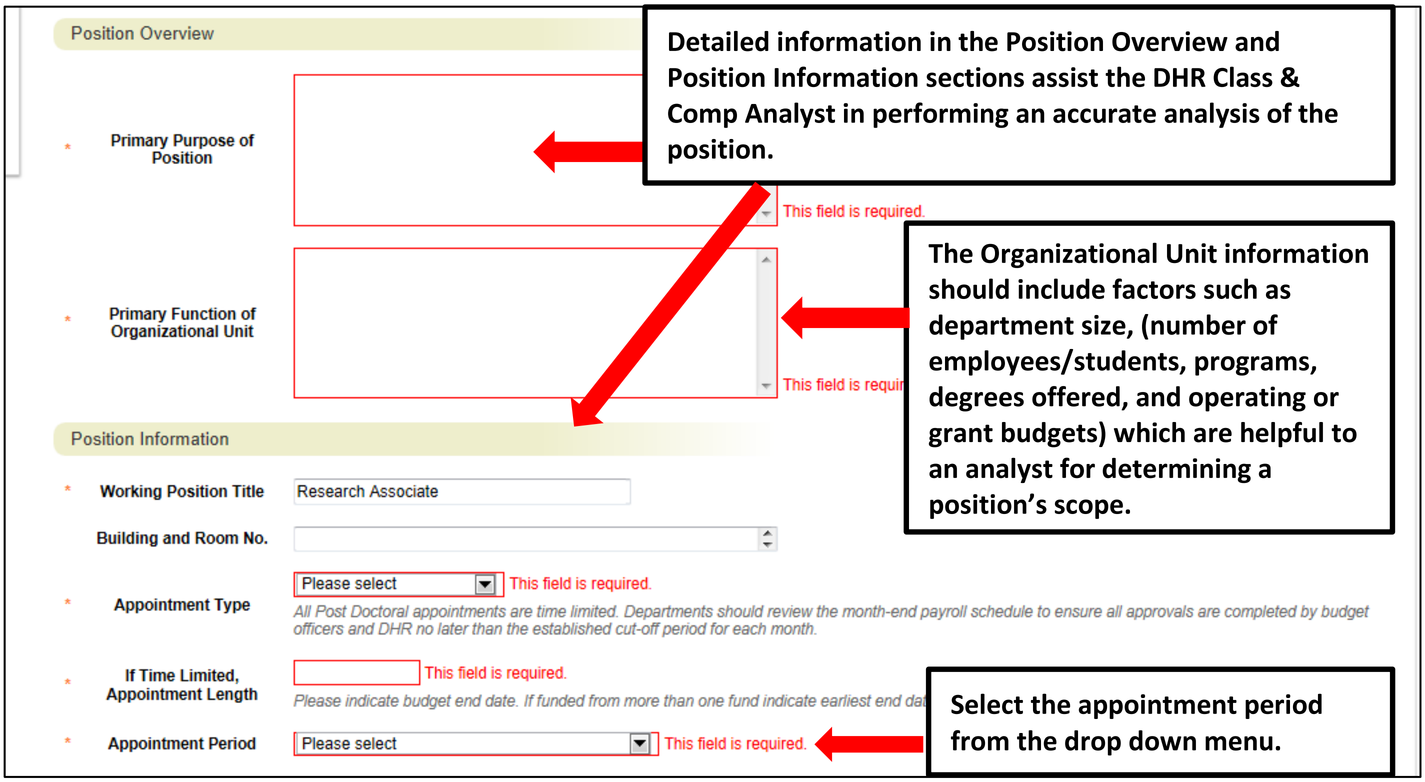
Clicking on the **Position/Classification Title** will open the **View Classification** page in a new tab within your web browser. After reviewing the classification summary information, you will need to close this tab in order to return to the **Classification** tab and your request in progress. **PLEASE 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:



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:





Post Doctoral Create New – Position Details Tab – Primary Responsibilities

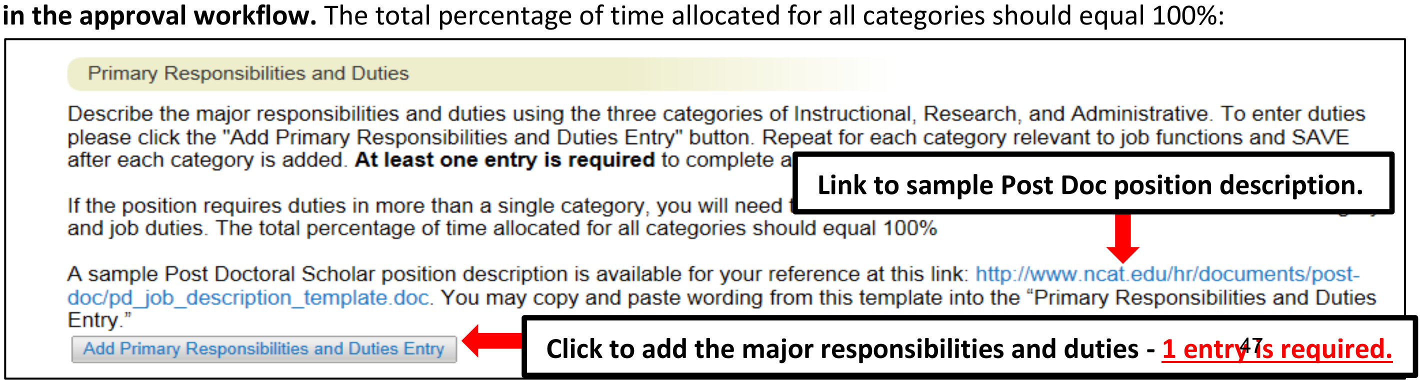
The next section of the Position Details tab is used to build **current duties and responsibilities** into the position. It is the *most important section* of a position description request, but easily missed by first-time users. Please read and follow all instructions in this area to ensure that your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

On 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 ***scroll down*** 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 using the three categories of Instructional, Research, and Administrative. To enter duties please click the "Add Primary Responsibilities and Duties Entry" button. Repeat for each category relevant to job functions and SAVE after each category is added. **At least one entry is required** to complete a position description request.

If the position requires duties in more than a single category, you will need to **scroll back down to this section** to add another category and job duties. The total percentage of time allocated for all categories should equal 100%

A sample Post Doctoral Scholar position description is available for your reference at this link: http://www.ncat.edu/hr/documents/post-doc/pd_job_description_template.doc. You may copy and paste wording from this template into the "Primary Responsibilities and Duties Entry."

* **Function** Please select

Select 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**

Indicate percentage of time spent performing tasks and responsibilities described.

Remove Entry?

Add Primary Responsibilities and Duties Entry

Post Doctoral Create New – Position Details – Compliance and Requirements

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

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

Information from this section is used to populate the job posting when it is time to recruit.

* **Is this position considered an essential position?** Please select This field is required.

Normal Work Schedule

From [time] to [time] on [days of week] or expected office hours

* **Department Required Skills** This field is

* **Date Ph.D. Conferred** This field is required.

A conferred Ph.D. degree awarded no more than 5 years prior to appointment is re

A conferred Ph.D. degree awarded no more than 5 years prior to appointment is required for post doctoral employees.

* **Preferred Years Experience, Skills, Training, Education** This field is

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>>

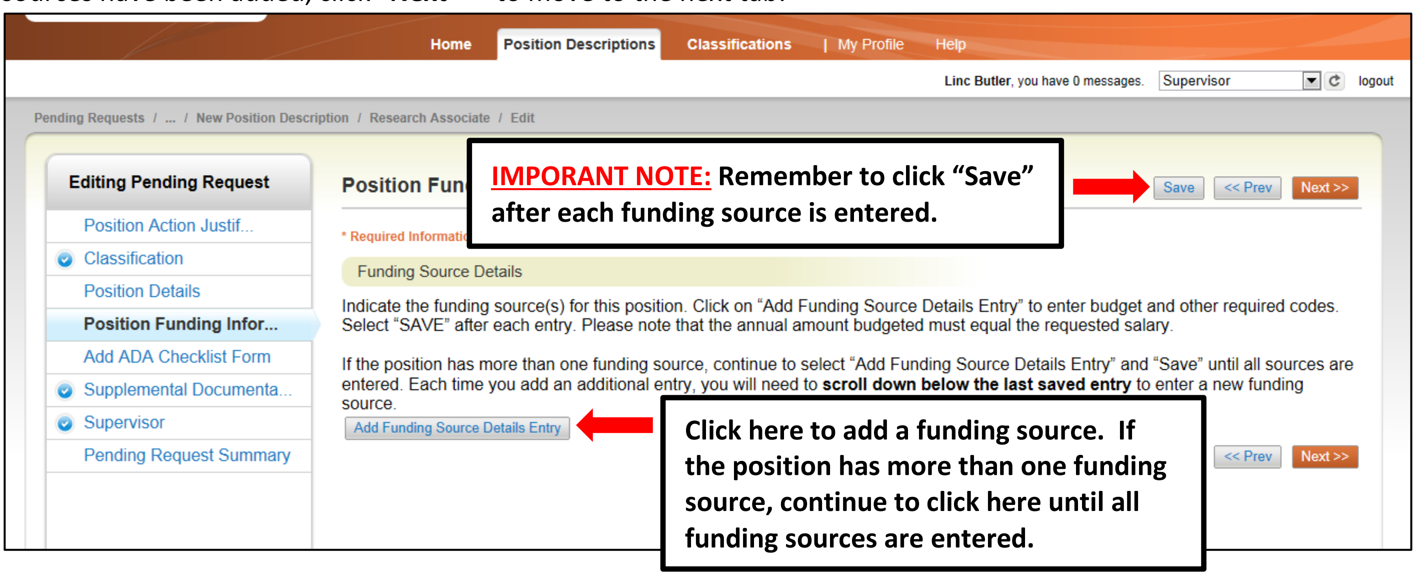
Save <<

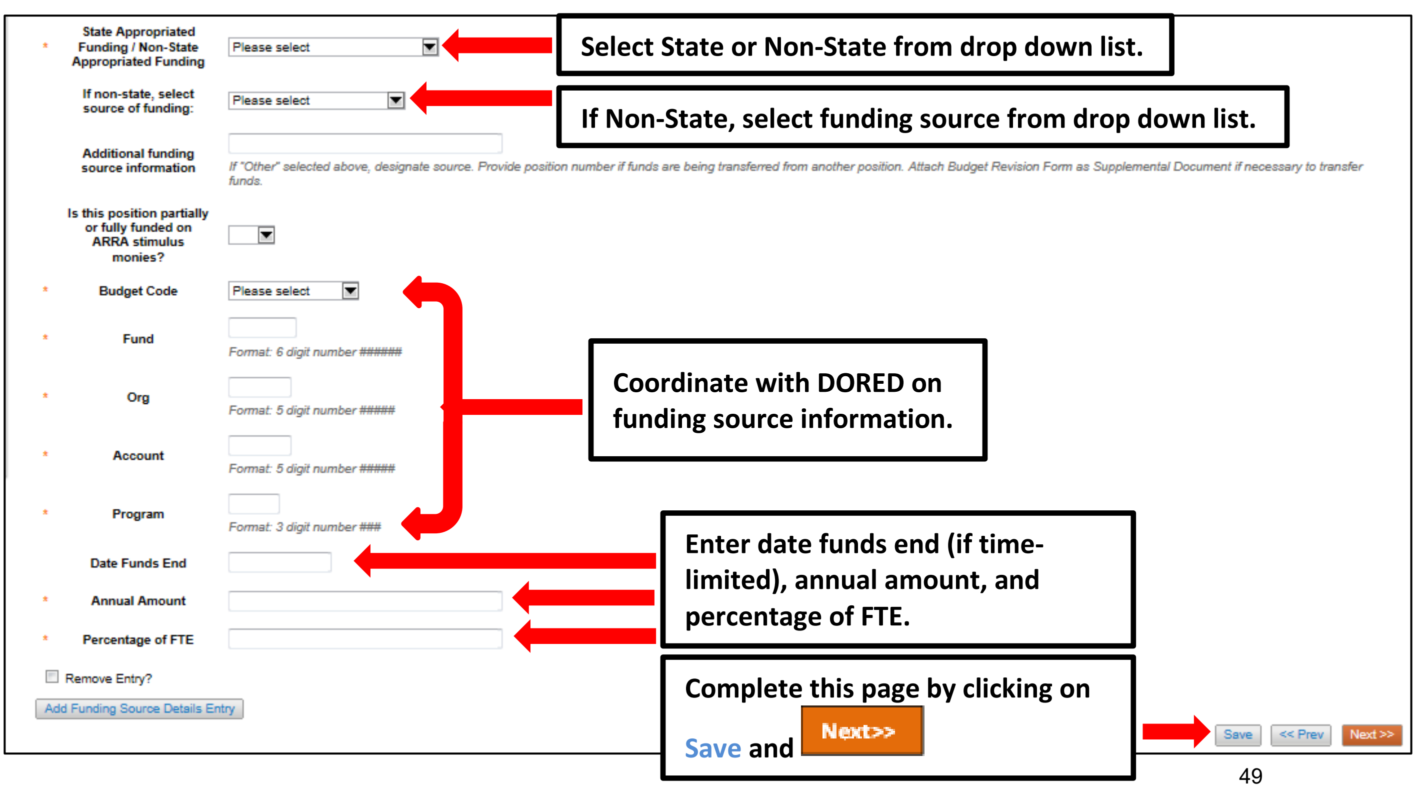
Post Doctoral Create New - Position Funding Information Tab

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:



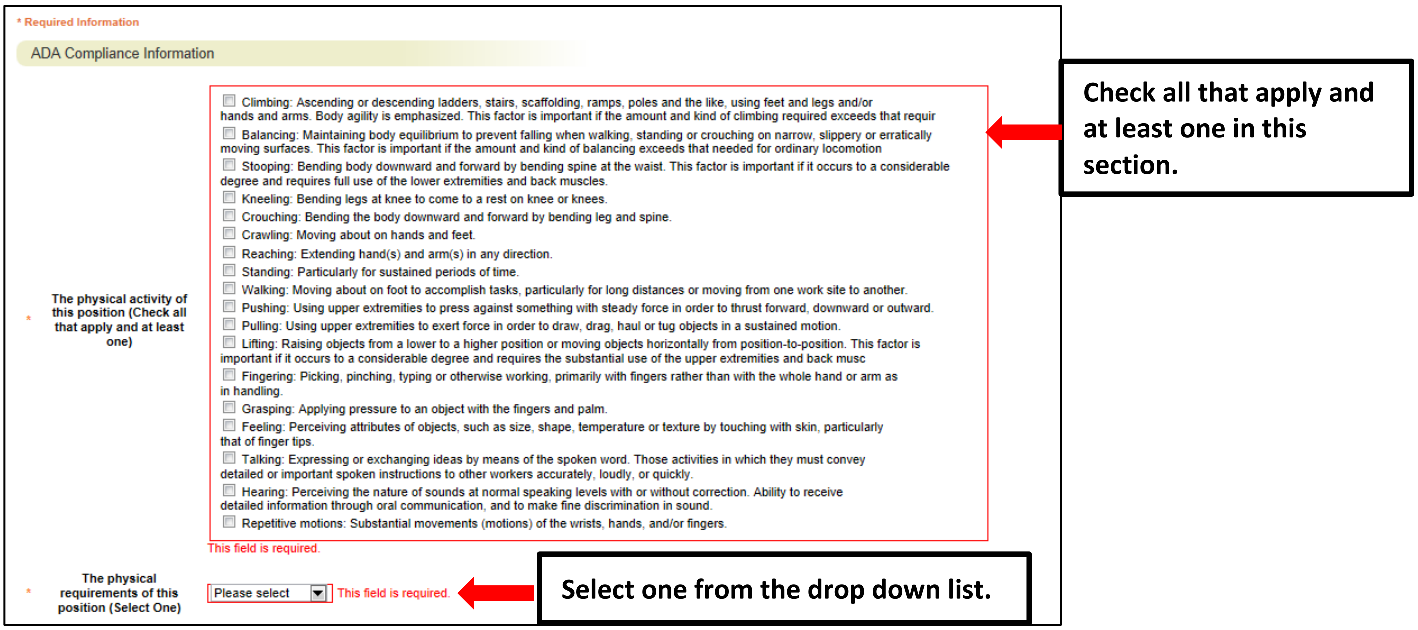


Post Doctoral Create New - Add ADA Checklist Form Tab

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)



* Required Information

ADA Compliance Information

* The physical activity of this position (Check all that apply and at least one)

- Climbing: 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
- Stooping: Bending body downward 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.
- Kneeling: Bending legs at knee to come to a rest on knee or knees.
- Crouching: Bending the body downward and forward by bending leg and spine.
- Crawling: Moving about on hands and feet.
- Reaching: Extending hand(s) and arm(s) in any direction.
- Standing: Particularly for sustained periods of time.
- Walking: Moving about on foot to accomplish tasks, particularly for long distances or moving from one work site to another.
- Pushing: Using upper extremities to press against something with steady force in order to thrust forward, downward or outward.
- Pulling: Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.
- Lifting: Raising objects from a lower to a higher position or moving objects horizontally from position-to-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 handling.
- Grasping: Applying pressure to an object with the fingers and palm.
- Feeling: Perceiving attributes of objects, such as size, shape, temperature or texture by touching with skin, particularly that of finger tips.
- Talking: 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, loudly, or quickly.
- Hearing: Perceiving the nature of sounds at normal speaking levels with or without correction. Ability to receive detailed information through oral communication, and to make fine discrimination in sound.
- Repetitive motions: Substantial movements (motions) of the wrists, hands, and/or fingers.

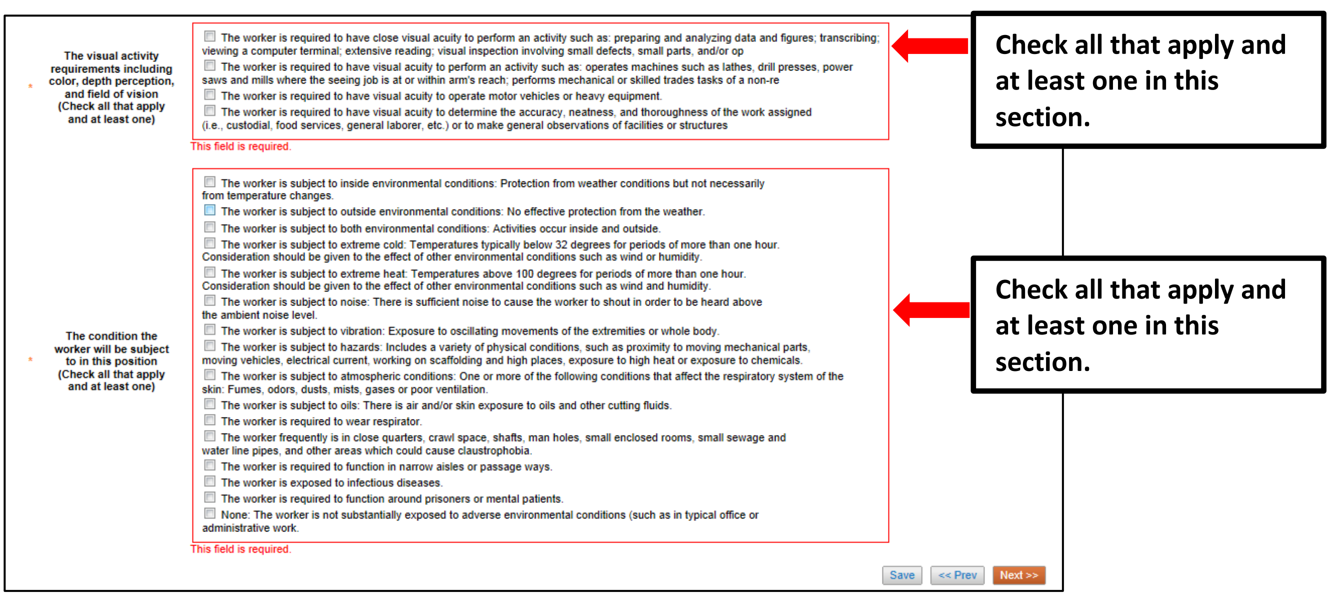
This field is required.

* The physical requirements of this position (Select One)

Please select — This field is required.

Check all that apply and at least one in this section.

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 worker is required to have close visual acuity to perform an activity such as: preparing and analyzing data and figures; transcribing; viewing a computer terminal; extensive reading; visual inspection involving small defects, small parts, and/or op
- The worker is required to have visual acuity to perform an activity such as: operates machines such as lathes, drill presses, power saws and mills where the seeing job is at or within arm's reach; performs mechanical or skilled trades tasks of a non-re
- The worker is required to have visual acuity to operate motor vehicles or heavy equipment.
- The worker is required to have visual acuity to determine the accuracy, neatness, and thoroughness of the work assigned (i.e., custodial, food services, general laborer, etc.) or to make general observations of facilities or structures

This field is required.

* The condition the worker will be subject to in this position (Check all that apply and at least one)

- The worker is subject to inside environmental conditions: Protection from weather conditions but not necessarily from temperature changes.
- The worker is subject to outside environmental conditions: No effective protection from the weather.
- The worker is subject to both environmental conditions: Activities occur inside and outside.
- The worker is subject to extreme cold: Temperatures typically below 32 degrees for periods of more than one hour. Consideration should be given to the effect of other environmental conditions such as wind or humidity.
- The worker is subject to extreme heat: Temperatures above 100 degrees for periods of more than one hour. Consideration should be given to the effect of other environmental conditions such as wind and humidity.
- The worker is subject to noise: There is sufficient noise to cause the worker to shout in order to be heard above the ambient noise level.
- The worker is subject to vibration: Exposure to oscillating movements of the extremities or whole body.
- The worker is subject to hazards: Includes a variety of physical conditions, such as proximity to moving mechanical parts, moving vehicles, electrical current, working on scaffolding and high places, exposure to high heat or exposure to chemicals.
- The worker is subject to atmospheric conditions: One or more of the following conditions that affect the respiratory system of the skin: Fumes, odors, dusts, mists, gases or poor ventilation.
- The worker is subject to oils: There is air and/or skin exposure to oils and other cutting fluids.
- The worker is required to wear respirator.
- The worker frequently is in close quarters, crawl space, shafts, man holes, small enclosed rooms, small sewage and water line pipes, and other areas which could cause claustrophobia.
- The worker is required to function in narrow aisles or passage ways.
- The worker is exposed to infectious diseases.
- The worker is required to function around prisoners or mental patients.
- None: The worker is not substantially exposed to adverse environmental conditions (such as in typical office or administrative work.

This field is required.

Save | << Prev | Next >>

Check all that apply and at least one in this section.

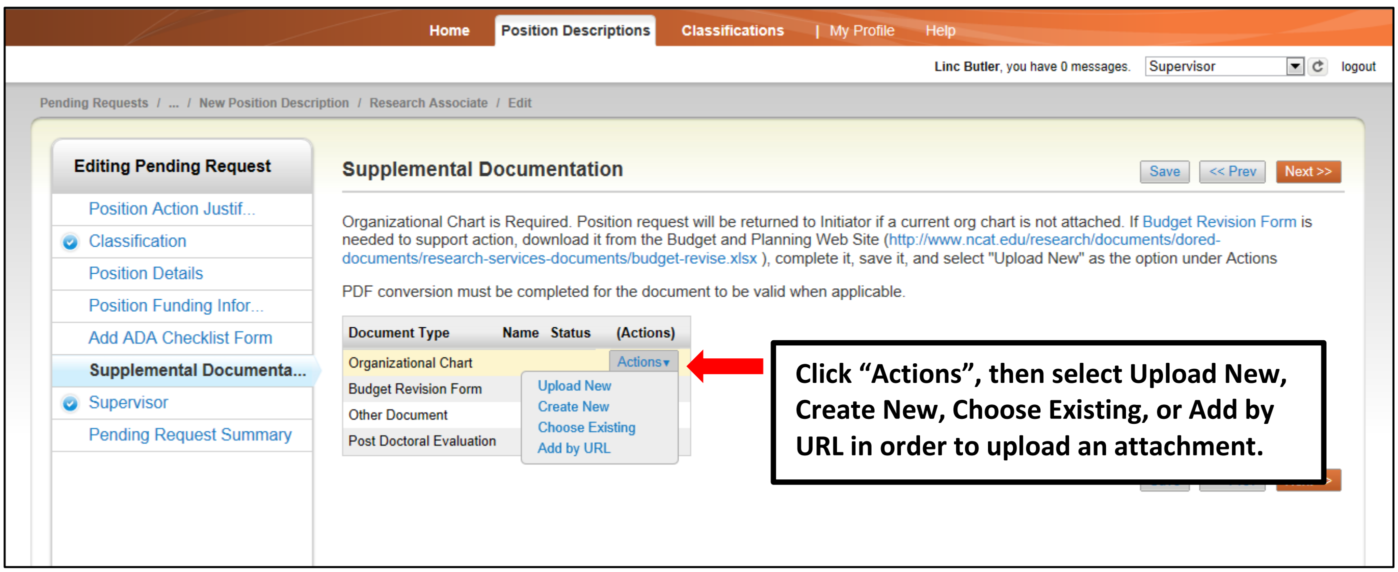
Check all that apply and at least one in this section.

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:

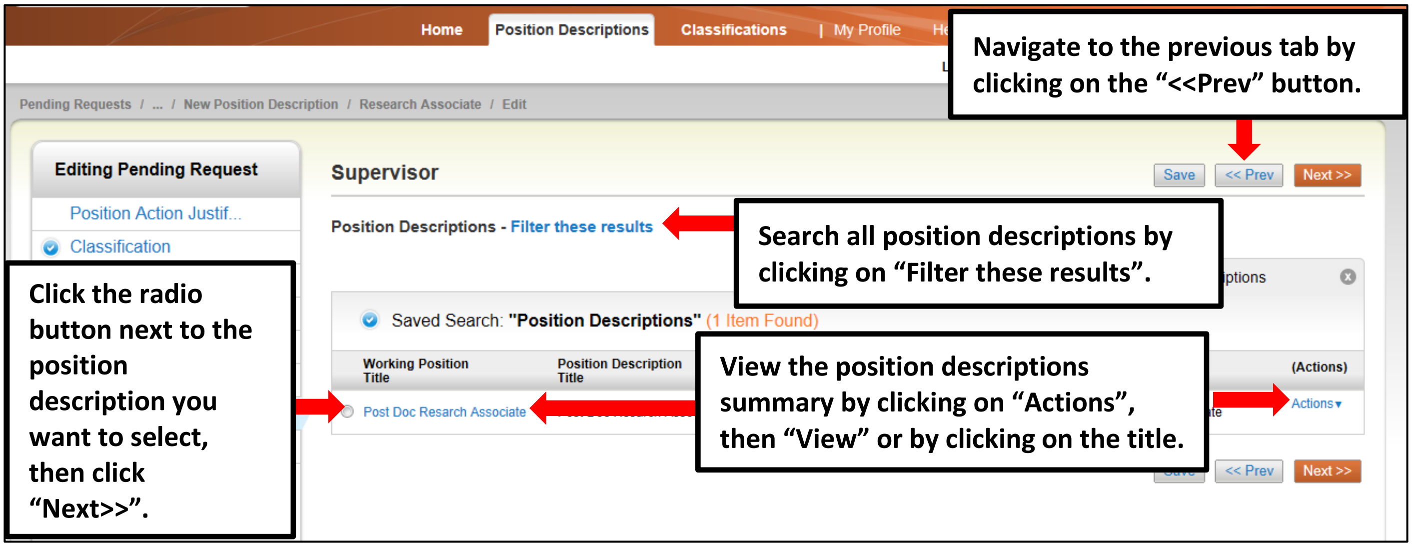


Post Doctoral Create New - Supervisor Tab

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 *different* Position Type (for example EHRA supervising SHRA), click on "**Filter these results**" and select the Position Type to which the supervisor of the position belongs. Then click on "**Search**" to access the list of supervisors in the selected Position Type.

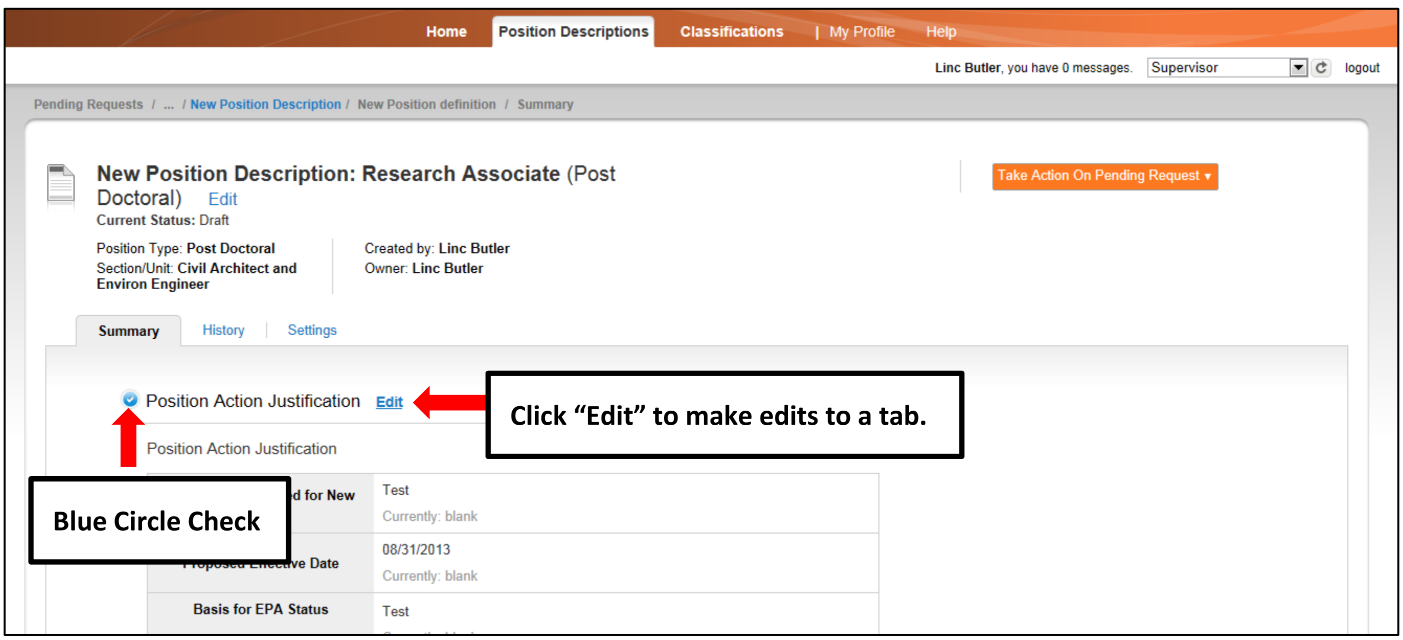
To view one of the position descriptions in the list, click on the **"Actions"** link next to the classification title you want to view and select "**View**", or click on the **Working Position Title.** To return from the summary, use the Back button located on the top left corner of your web browser. 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):

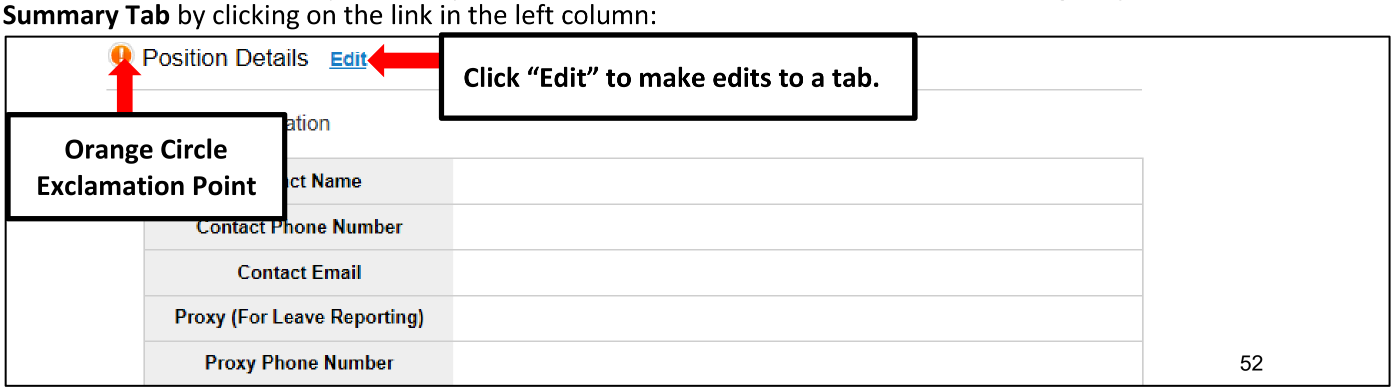


Post Doctoral Create New - Pending Request Summary Tab

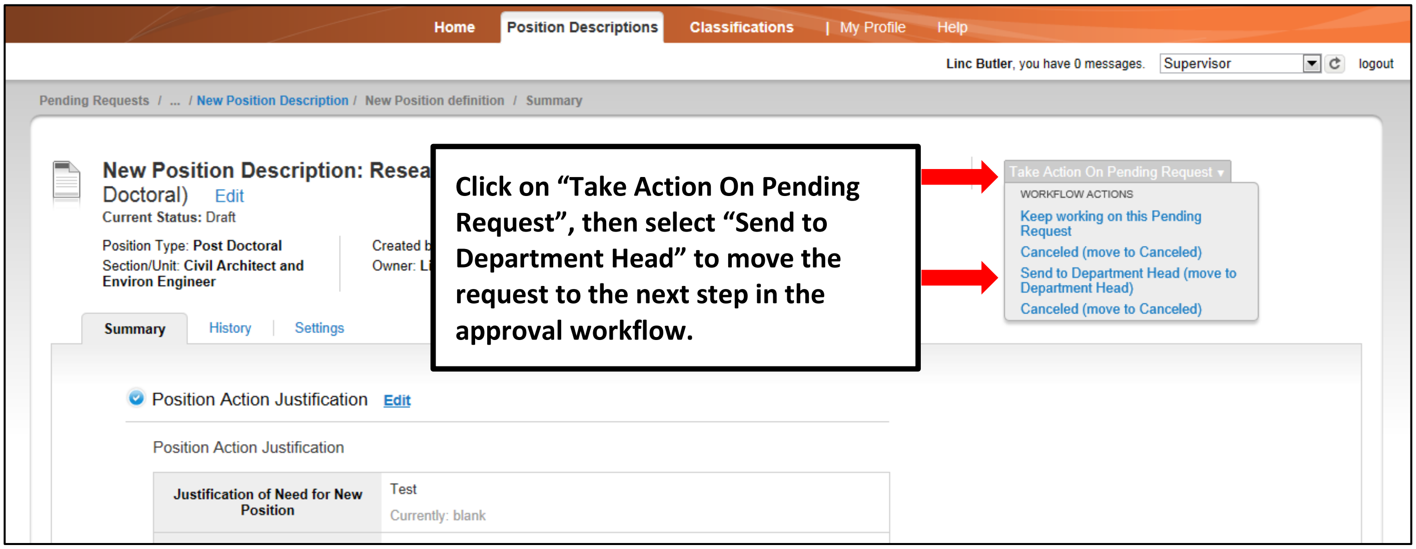
The **Pending Request Summary Tab** allows you to perform a final review all of the position information you've entered on the previous tabs prior to sending the request to the next step in the approval workflow. The **Blue Circle Check** appears by those tabs for which all required information has been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



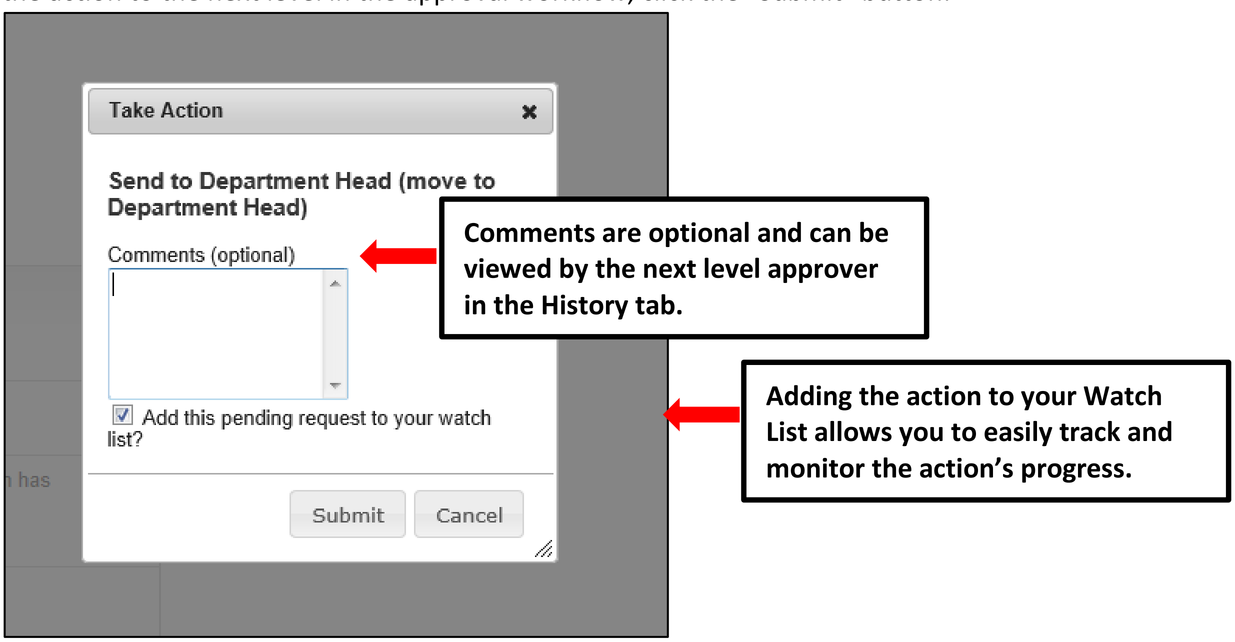
An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save",** and then return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



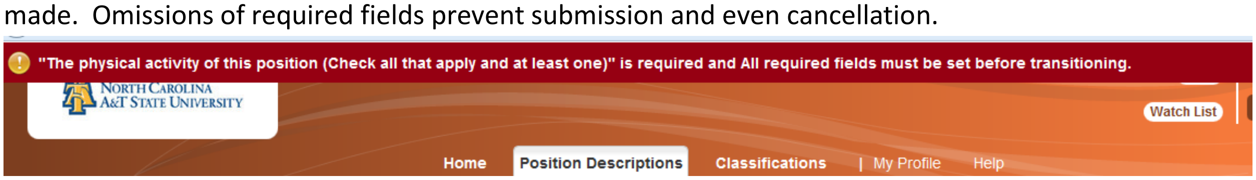
Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example,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



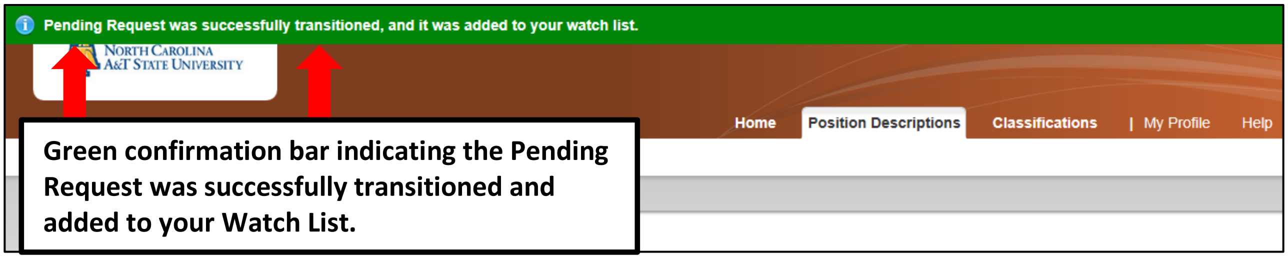
You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable in the History tab by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When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



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

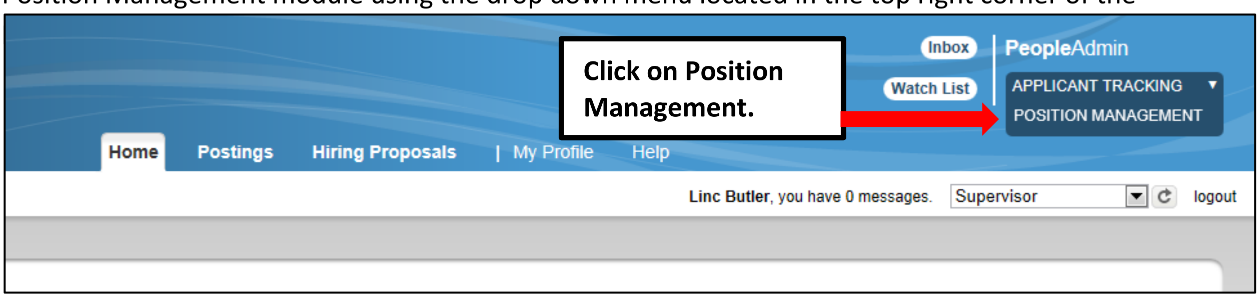


The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if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

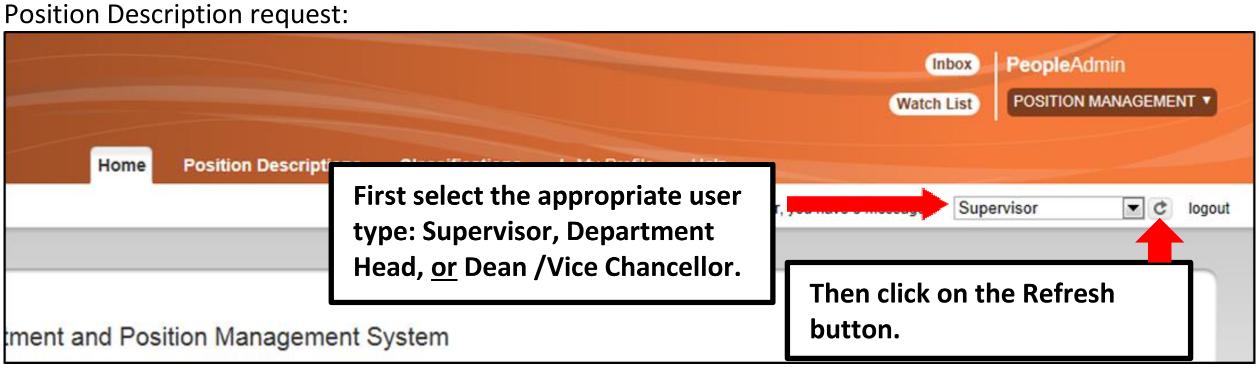
Modify Position Description – SHRA

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.

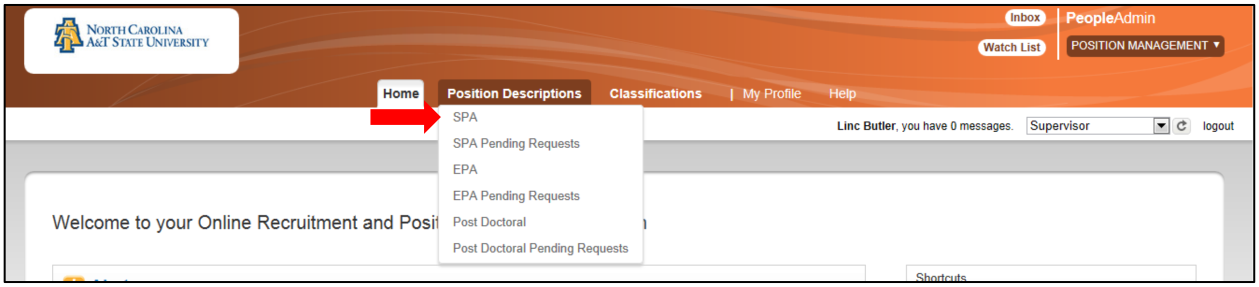
To initiate a Modify Position Description request for an SHRA position, first switch to the Position Management module using the drop down menu located in the top right corner of the



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:



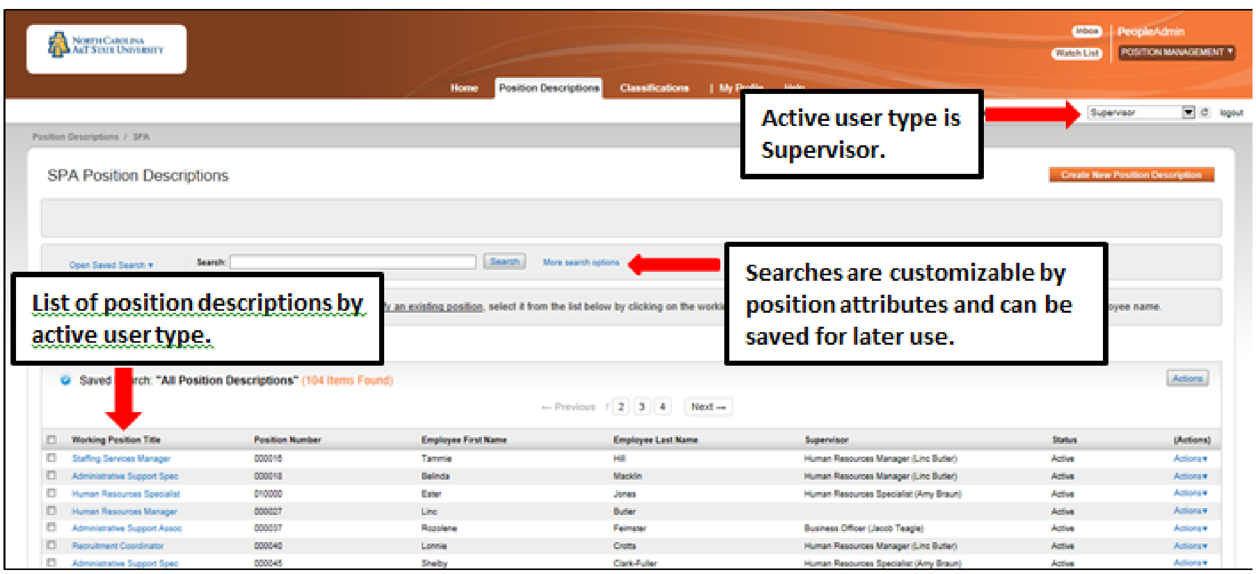
Next, hover your cursor over the Position Descriptions tab and click on “SHRA”:



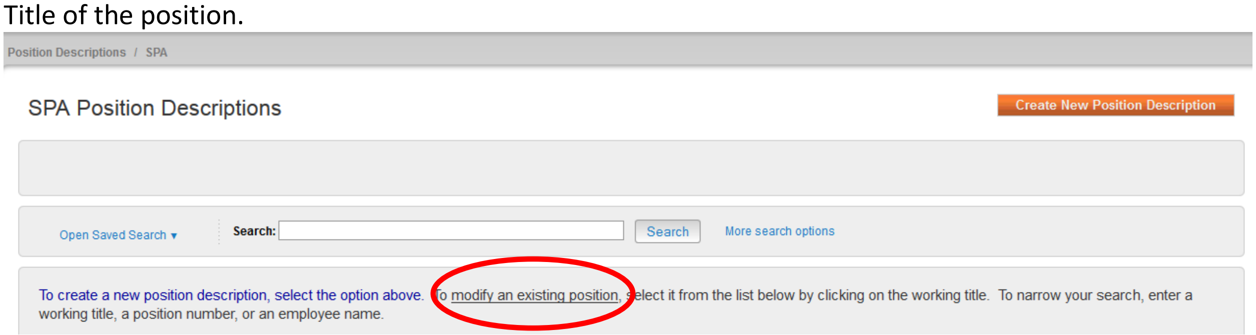
You will then be taken to the Position Descriptions view, which provides a list of all position descriptions based on your active user type as follows:

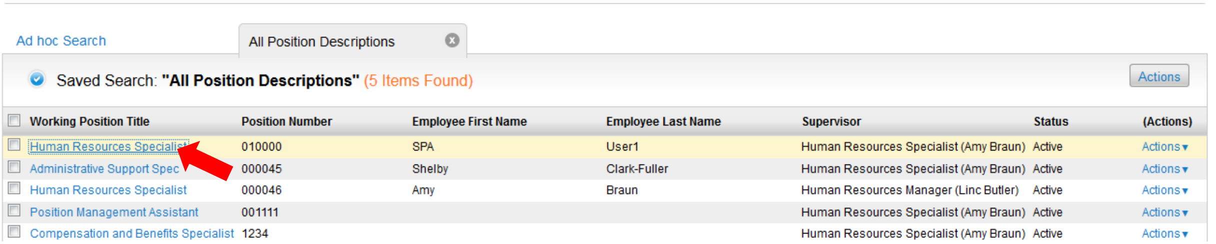
Active User Type	Positions in Position Descriptions List
Supervisor	Positions that are direct reports to the Supervisor only.
Department Head/Supervisor	All positions that report to the department the Department Head is assigned to.
Dean / Vice Chancellor	All positions within the School, College, or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

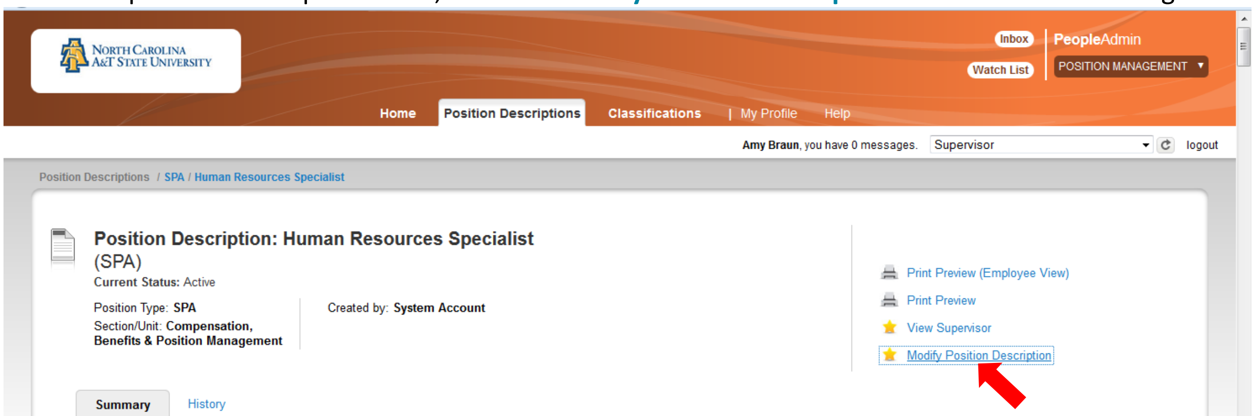


To initiate the request, select the position number you are modifying by clicking on the Working Position Title of the position.



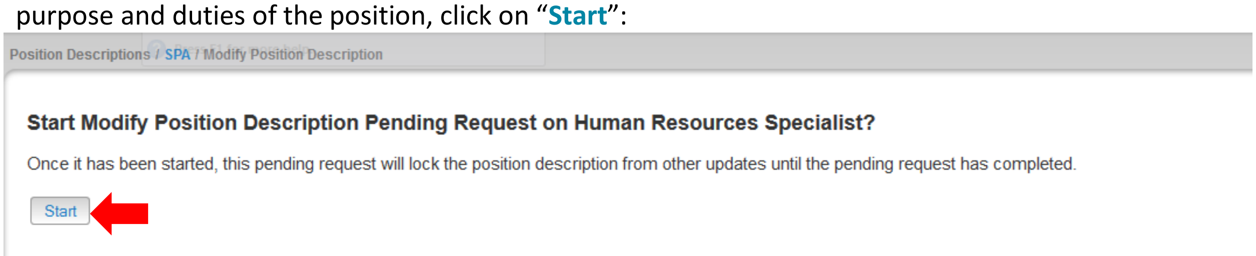


When the position description loads, click on "**Modify Position Description**" in the menu to the right.



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**":

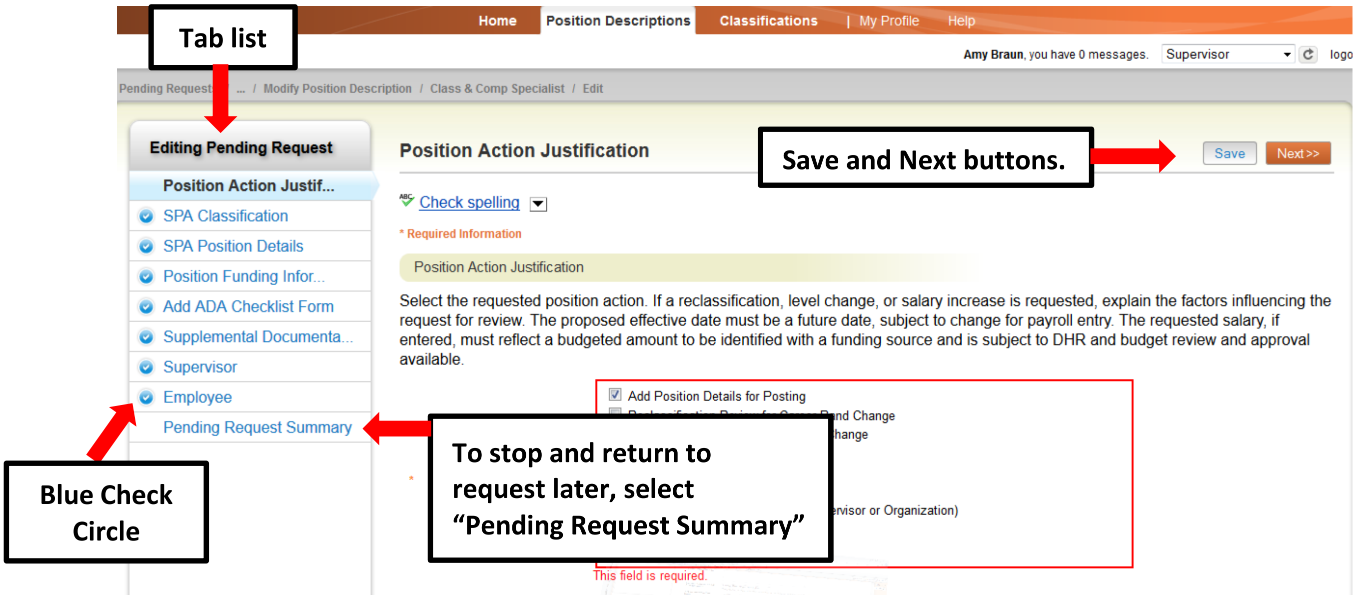


SHRA Modify - Edit Pending Request Page - General Navigation

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.

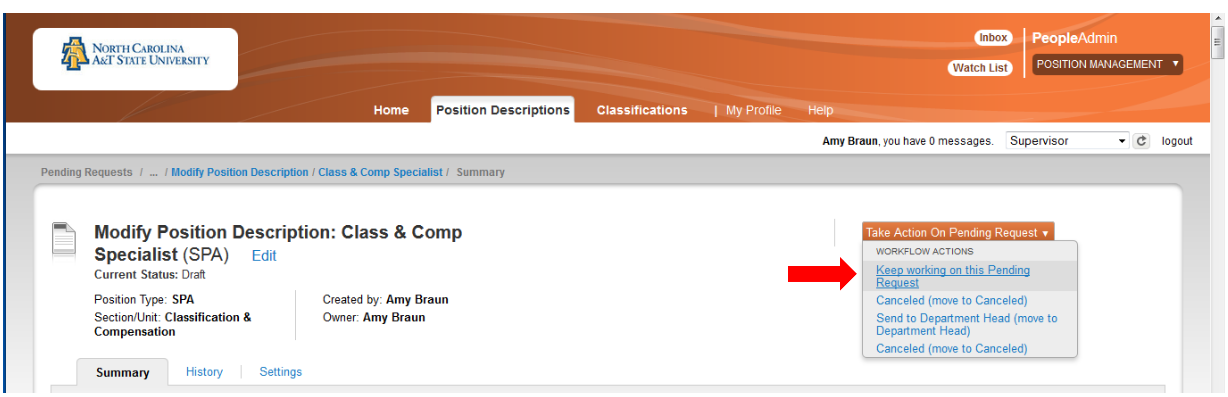
Required fields are highlighted in red and must be filled in before the Position Description can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a Blue Check Circle will appear beside the tab. The Blue Check Circle also appears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



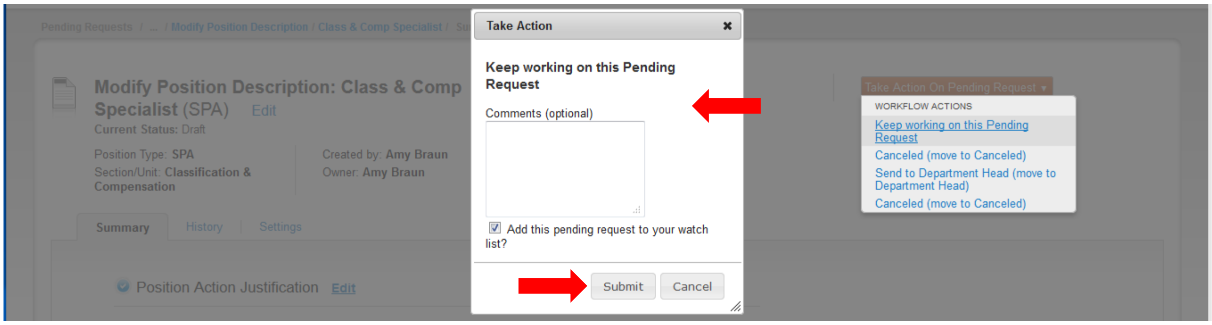
SHRA Modify - Saving to Return to a Pending Request Later

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"

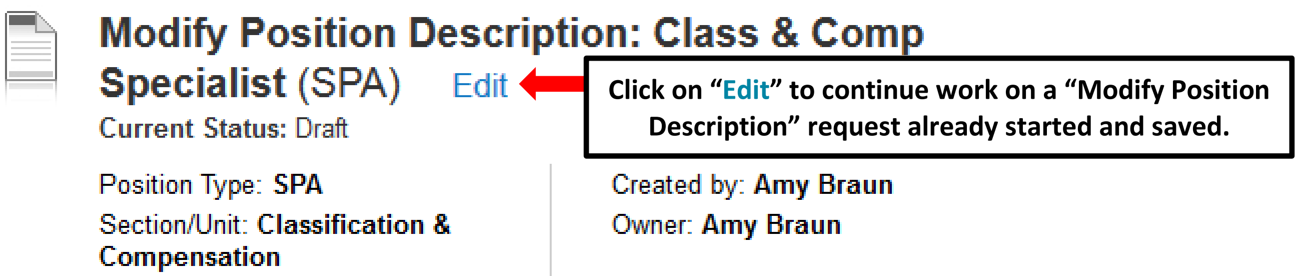


4) Add any Comments into the window that opens (below) as notes, if desired
5) Click "Submit"



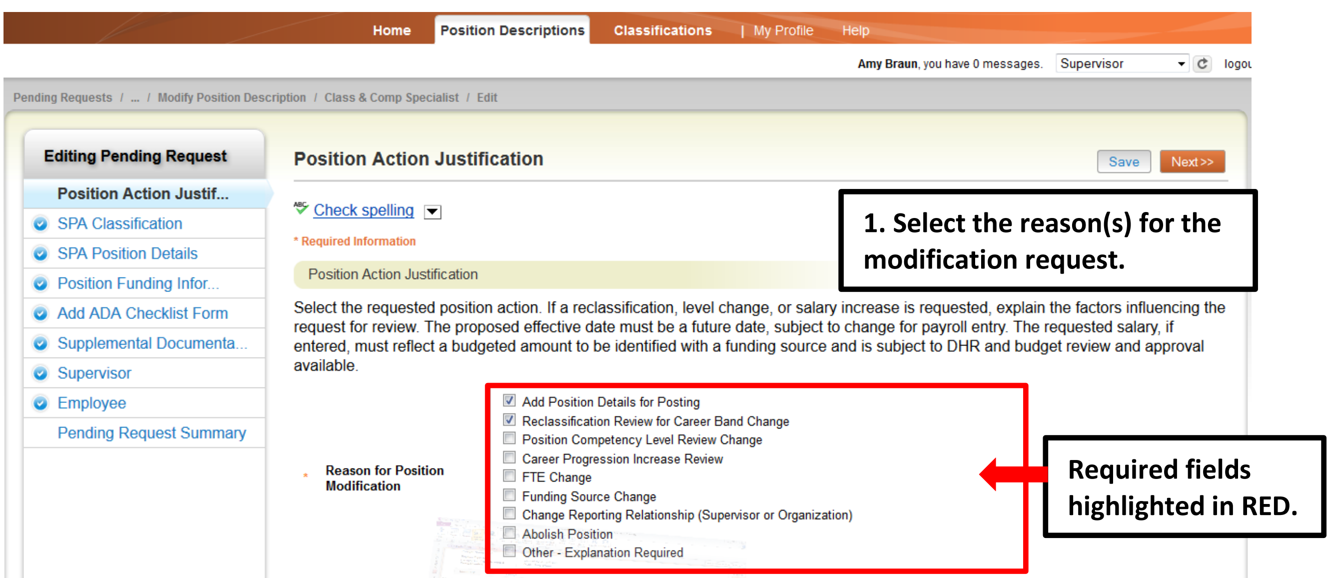
The **Pending Request** on this position description numbers can be located when you log into the Position Description module again as the same **User Type** you used to begin the action. Hover your cursor over the **Position Descriptions tab** and click on "**SHRA Pending Requests**."

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 Modify - Position Action Justification Tab

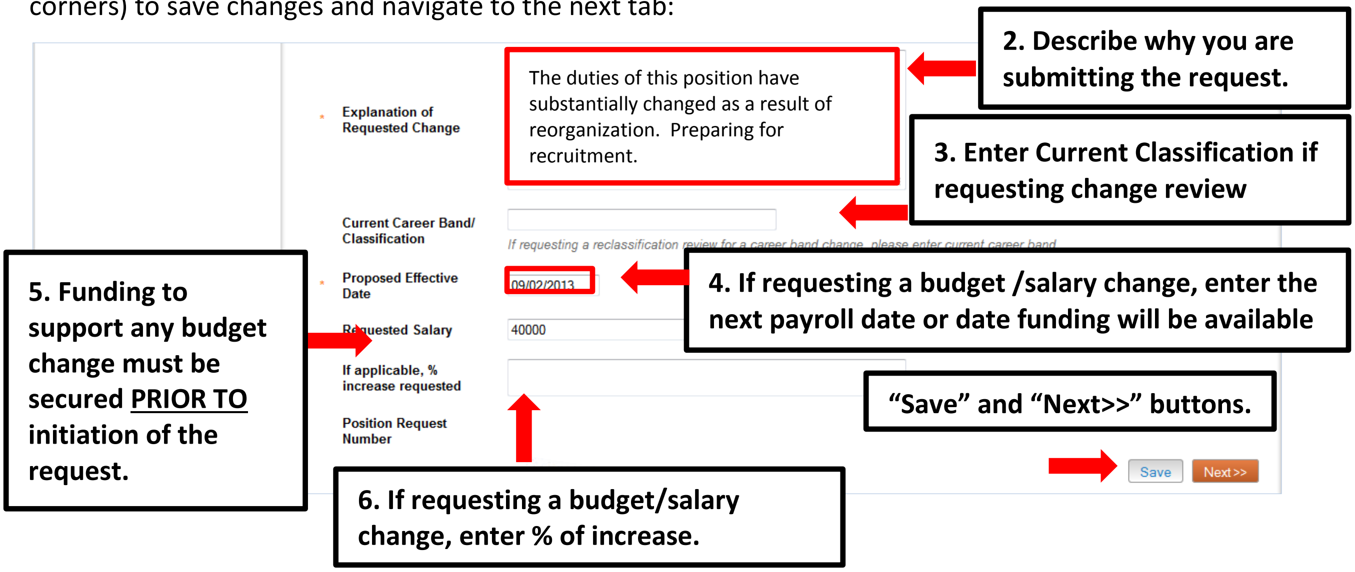
The "**Modify Position**" action in PeopleAdmin 7 allows for a variety of actions to be requested and completed. These selections differ based on the classification of the position being modified. At least one option must be selected, but in some cases more than one option will be applicable (For example,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



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.

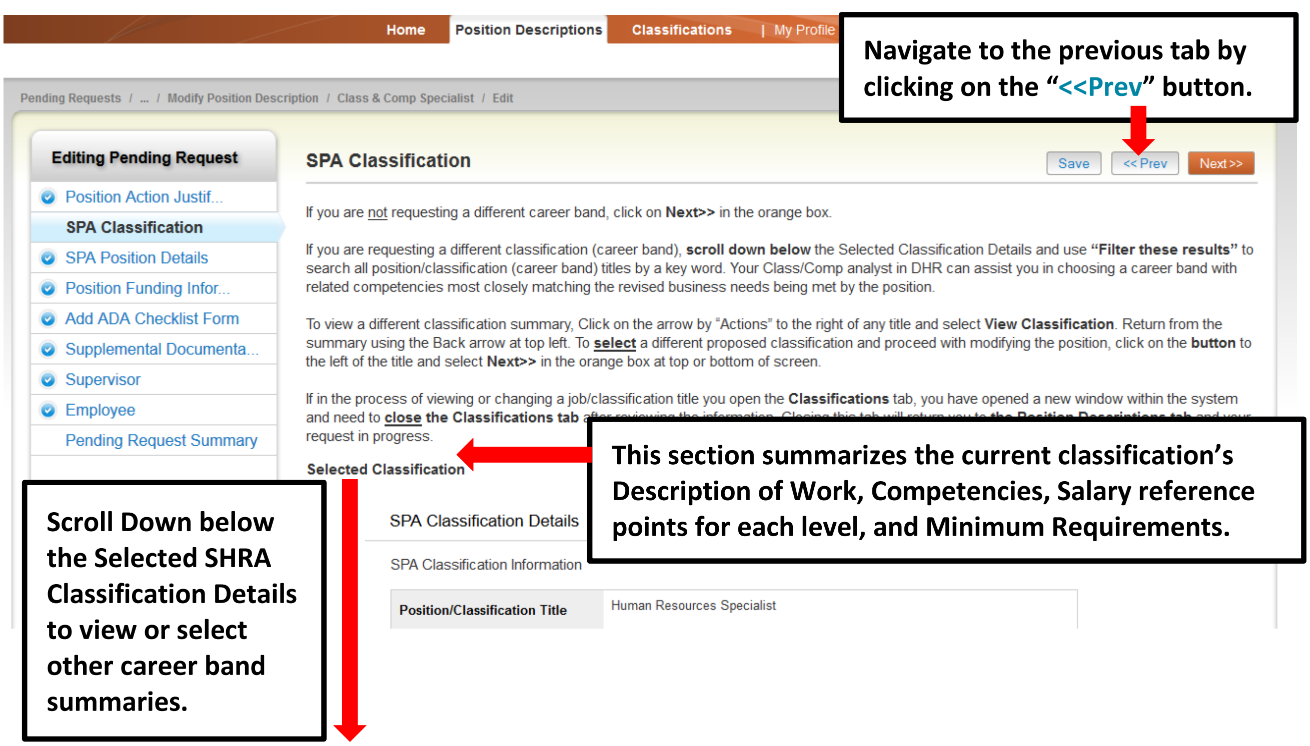
If you are requesting a reclassification, please enter the current classification in the designated field. Follow any other instructions; then click the **Next>>** button (located at both top and bottom right corners) to save changes and navigate to the next tab:



SHRA Modify - Classification Tab

If you are ***not*** requesting a different career band, click on **Next>>** located in the orange box at the top right-hand corner of the page.

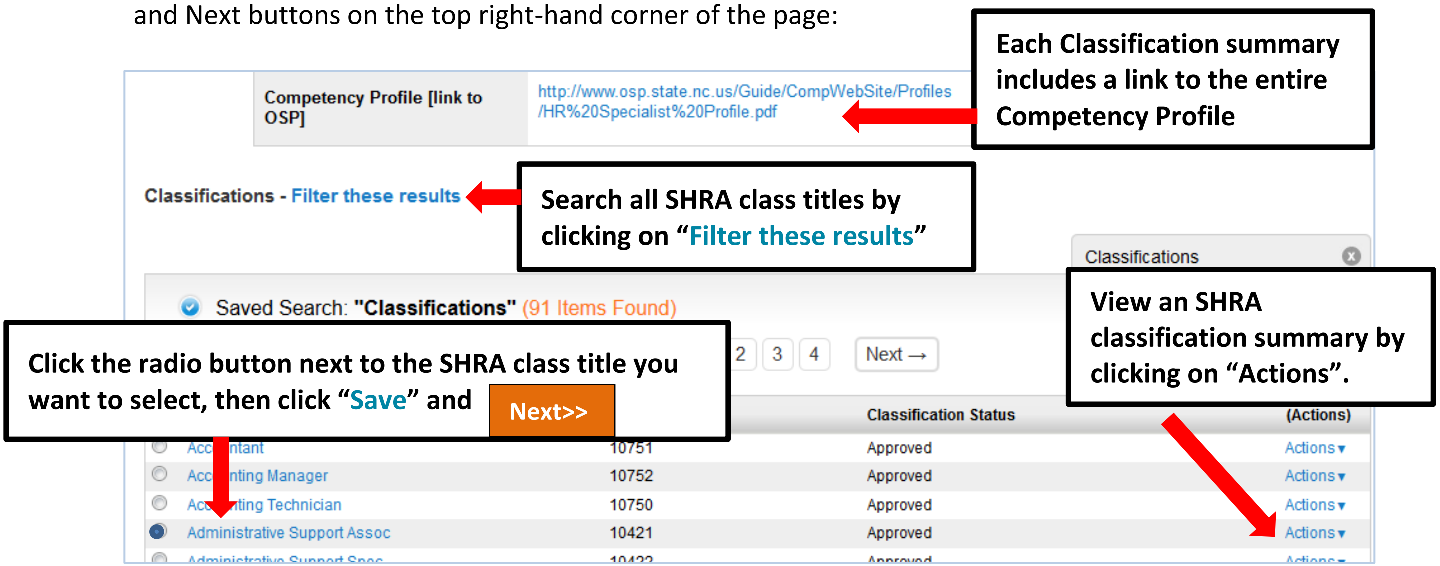
If you are requesting a different classification (career band), **scroll down below** the **Selected Classification** details and use "**Filter these results**" to search all position/classification (career band) titles by a key word. Your Class/Comp analyst in DHR can assist you in choosing a career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



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 *close* the web browser and **log you out** of the system.

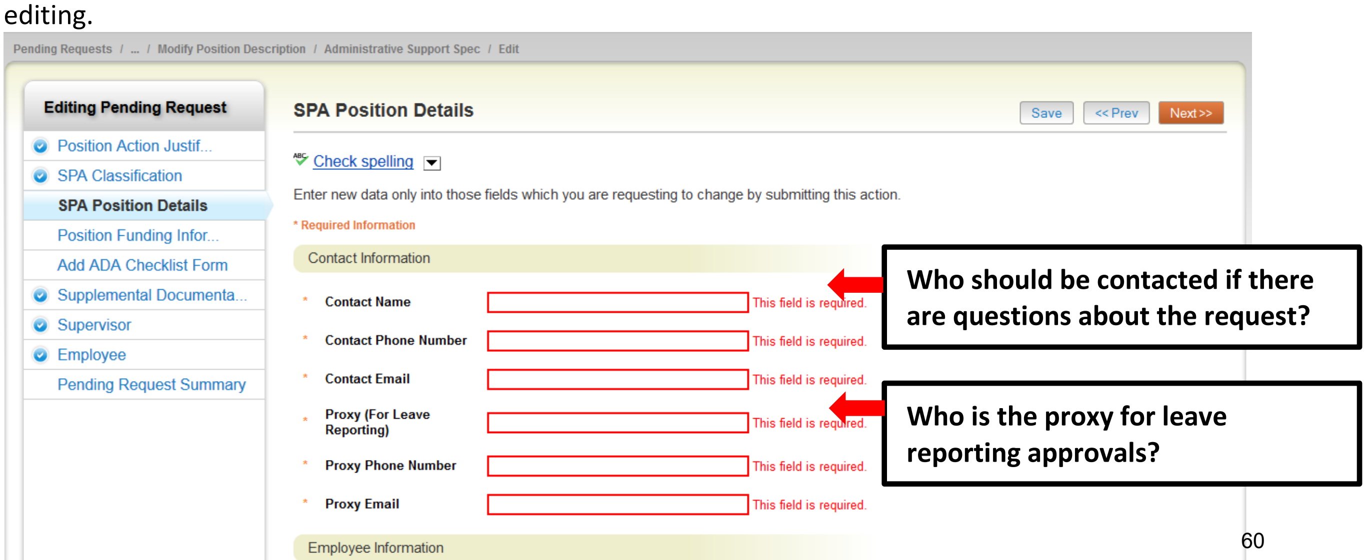
You can navigate to the previous tab by clicking on the grey **<<Prev**" button located between to the Save and Next buttons on the top right-hand corner of the page:

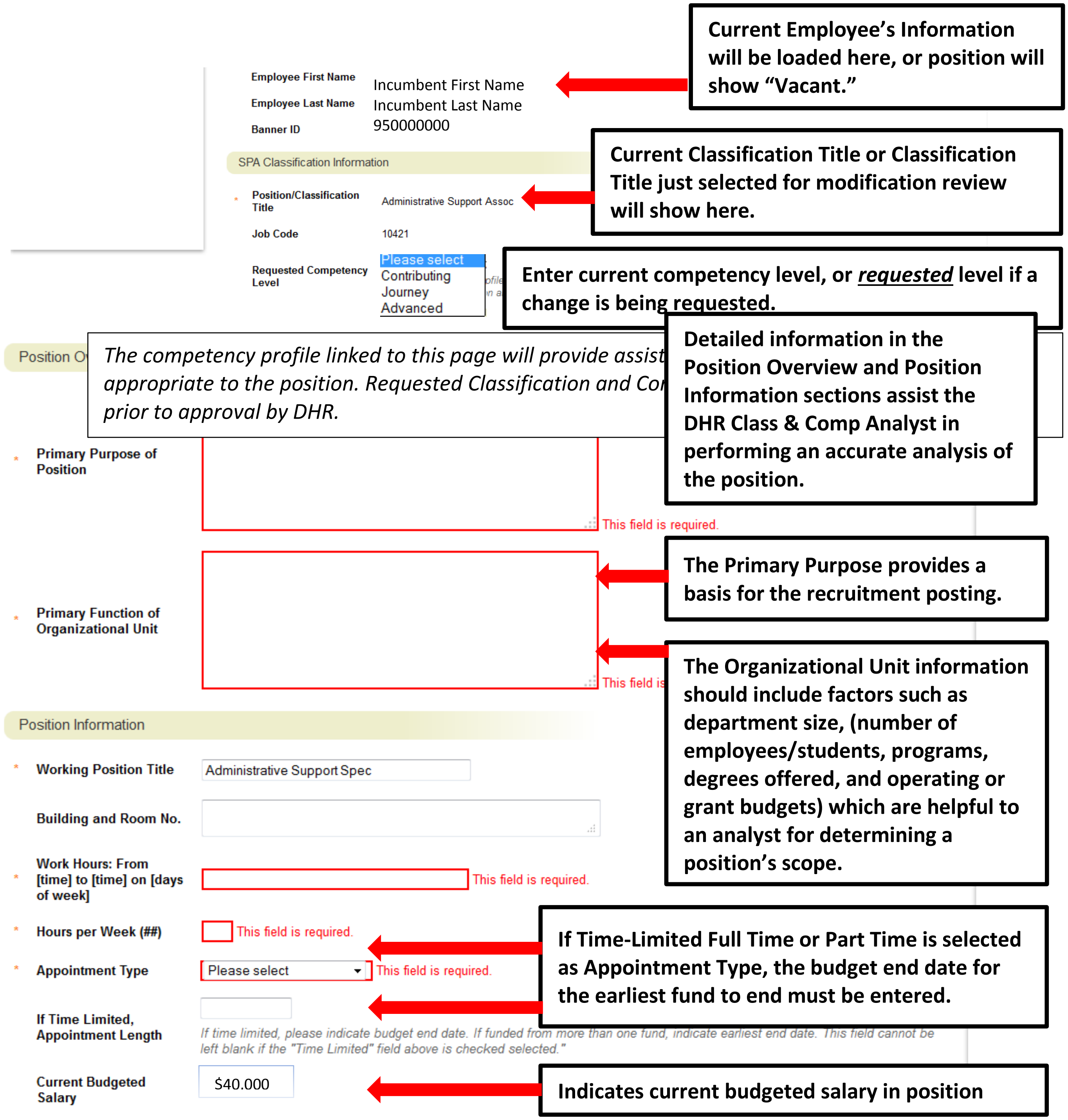


SHRA Modify - Position Details Tab

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 *first* 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 *need to be revised* will have to be identified for editing.



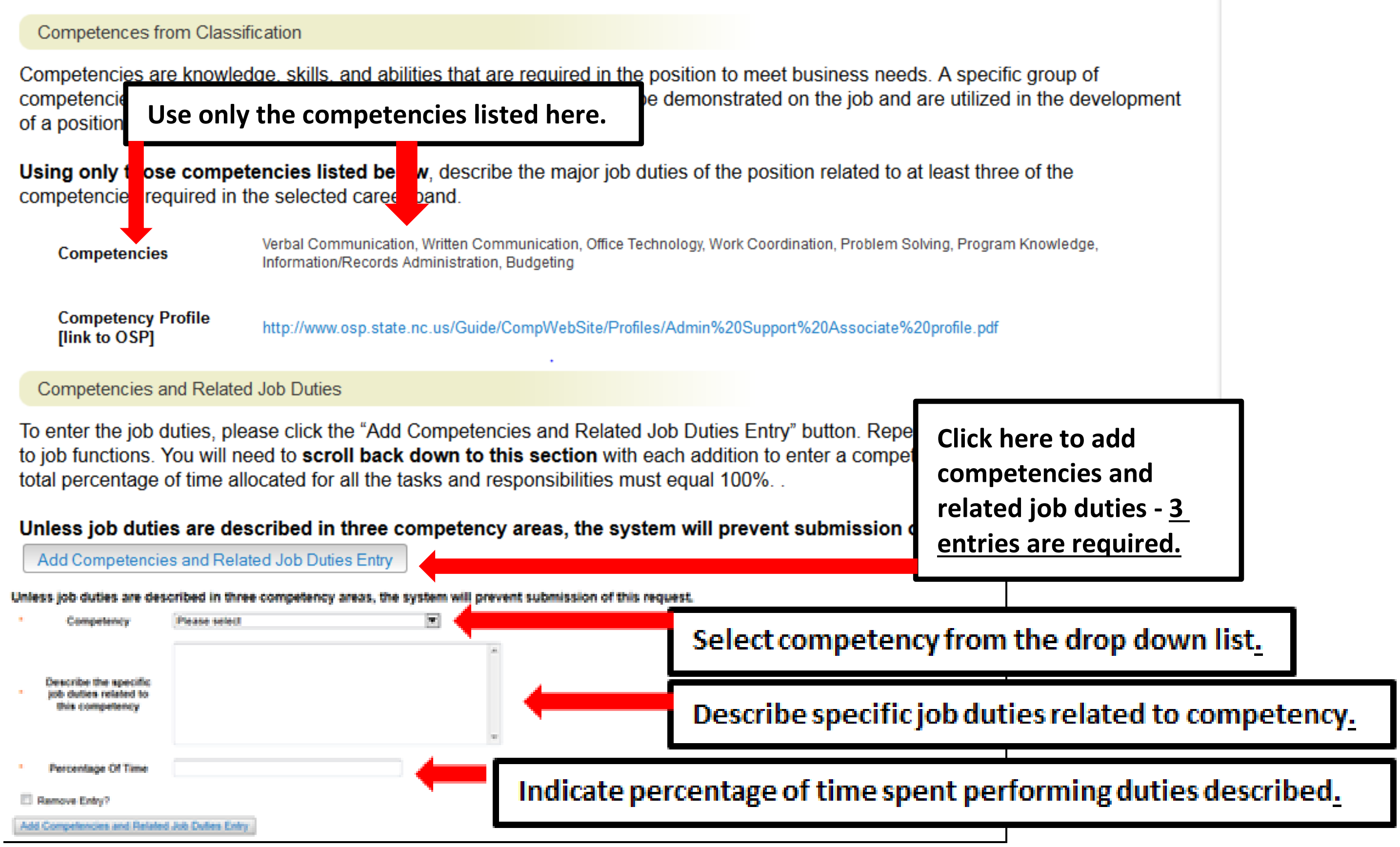


SHRA Modify – Position Details Tab – Competencies and Related Job Duties

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 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

Competencies are knowledge, skills, and abilities that are required in the position to meet business needs. A specific group of competenci... e demonstrated on the job and are utilized in the development of a position...

Using only t ose competencies listed be w, describe the major job duties of the position related to at least three of the competencie required in the selected care band.

Competencies Verbal Communication, Written Communication, Office Technology, Work Coordination, Problem Solving, Program Knowledge, Information/Records Administration, Budgeting

Competency Profile [link to OSP] http://www.osp.state.nc.us/Guide/CompWebSite/Profiles/Admin%20Support%20Associate%20profile.pdf

Competencies and Related Job Duties

To enter the job duties, please click the "Add Competencies and Related Job Duties Entry" button. Repe... to job functions. You will need to **scroll back down to this section** with each addition to enter a compet... total percentage of time allocated for all the tasks and responsibilities must equal 100%. .

Unless job duties are described in three competency areas, the system will prevent submission o...

Add Competencies and Related Job Duties Entry

Unless job duties are described in three competency areas, the system will prevent submission of this request.

Competency: Please select

Describe the specific job duties related to this competency

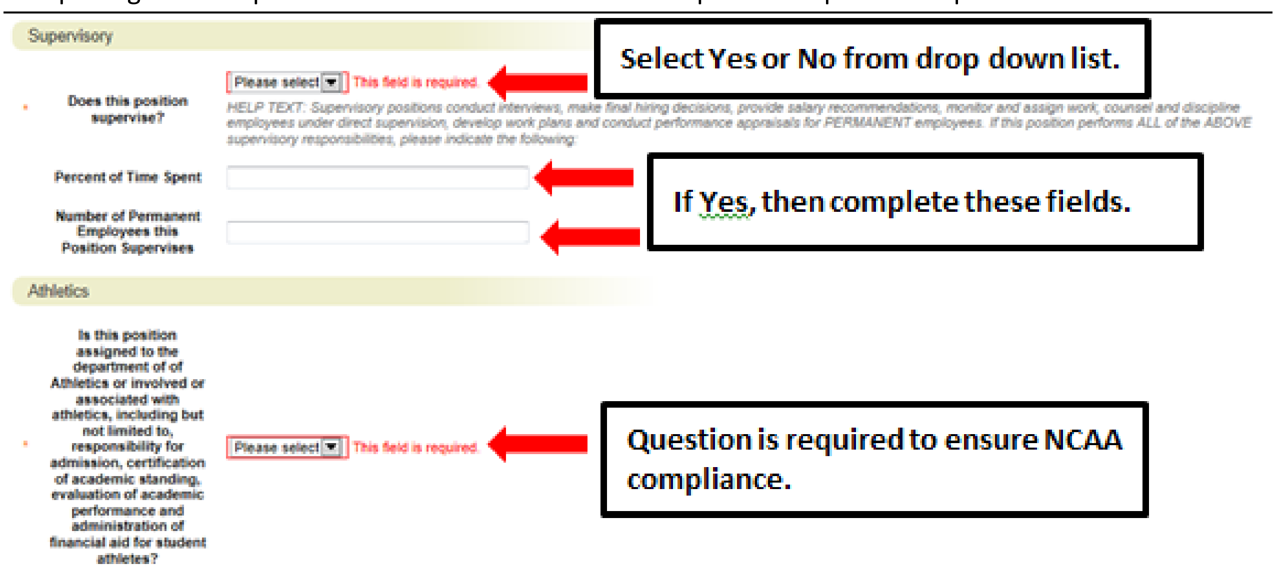
Percentage Of Time

Remove Entry?

Add Competencies and Related Job Duties Entry

SHRA 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.

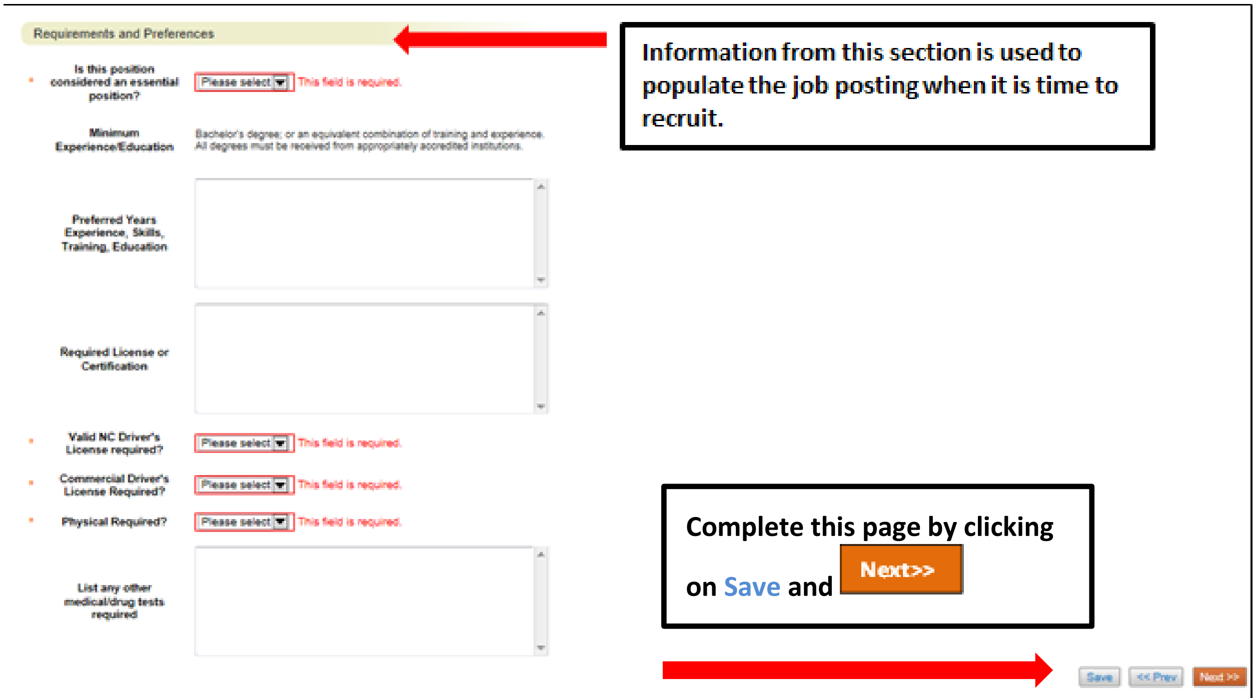
HELP TEXT: Supervisory positions conduct interviews, make final hiring decisions, provide salary recommendations, monitor and assign work, counsel and discipline employees under direct supervision, develop work plans and conduct performance appraisals for PERMANENT employees. If this position performs ALL of the ABOVE supervisory responsibilities, please indicate the following:

Percent of Time Spent

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.

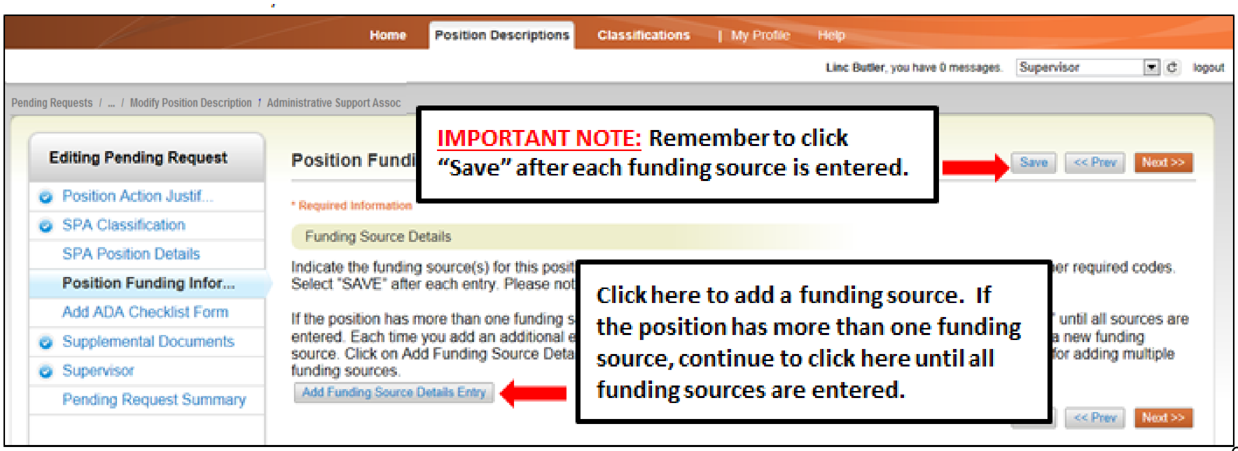


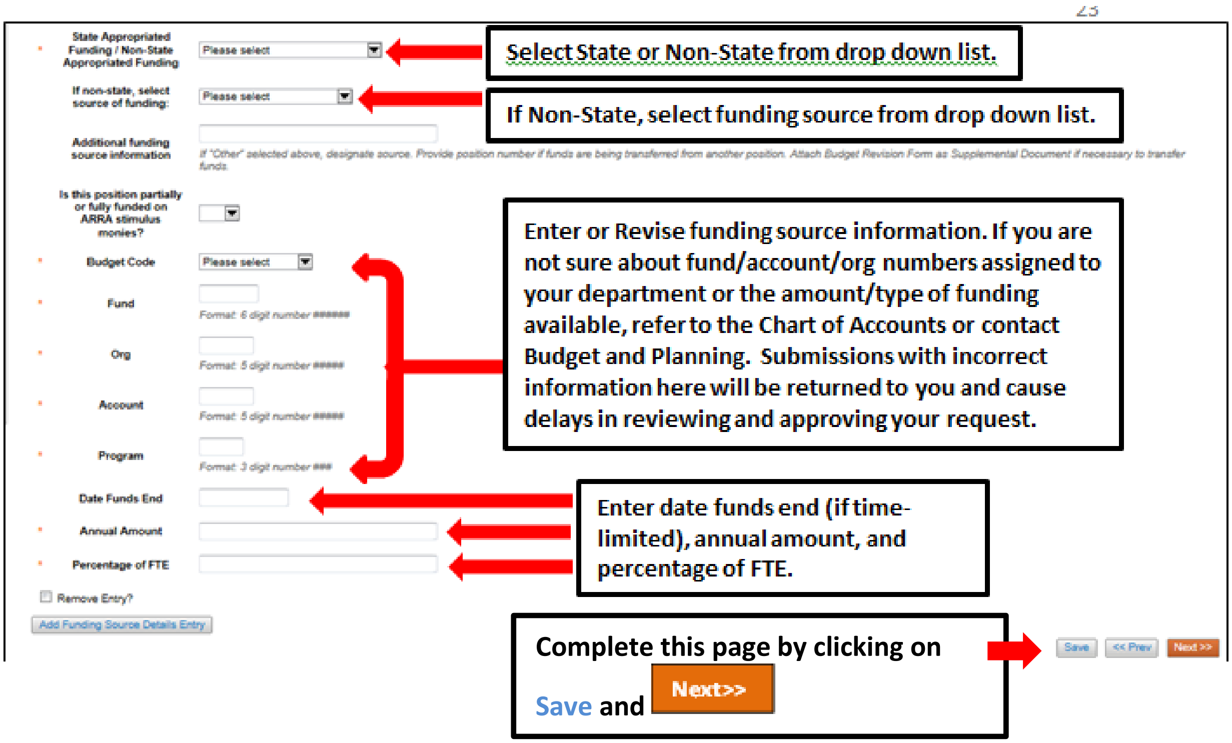
SHRA Modify - Position Funding Information Tab

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:





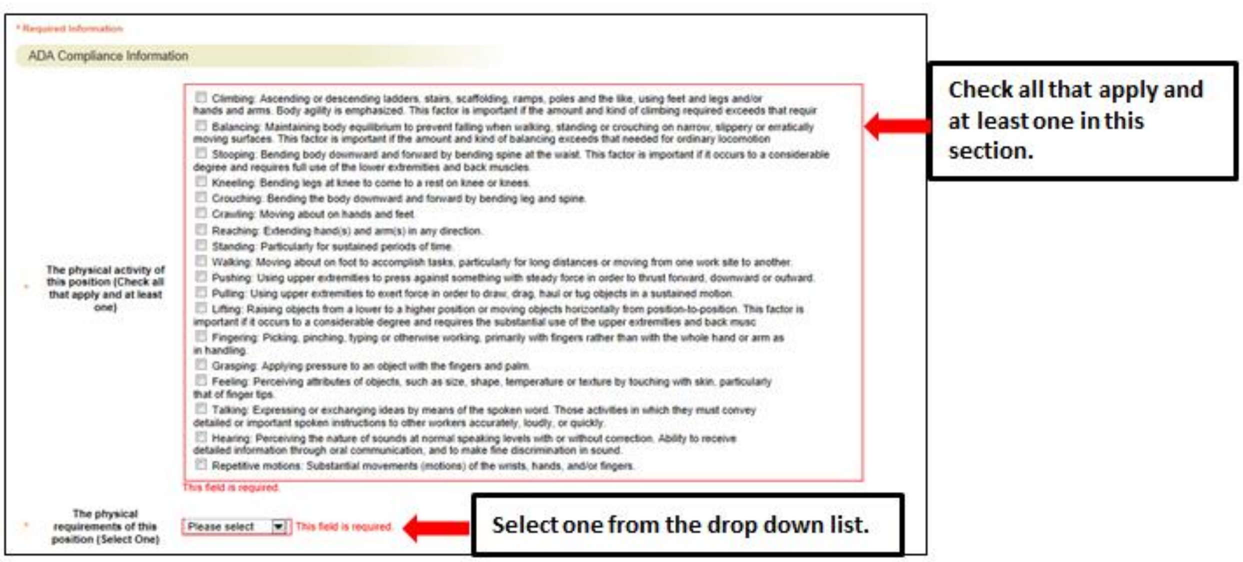
SHRA Modify - Add ADA Checklist Form Tab

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)



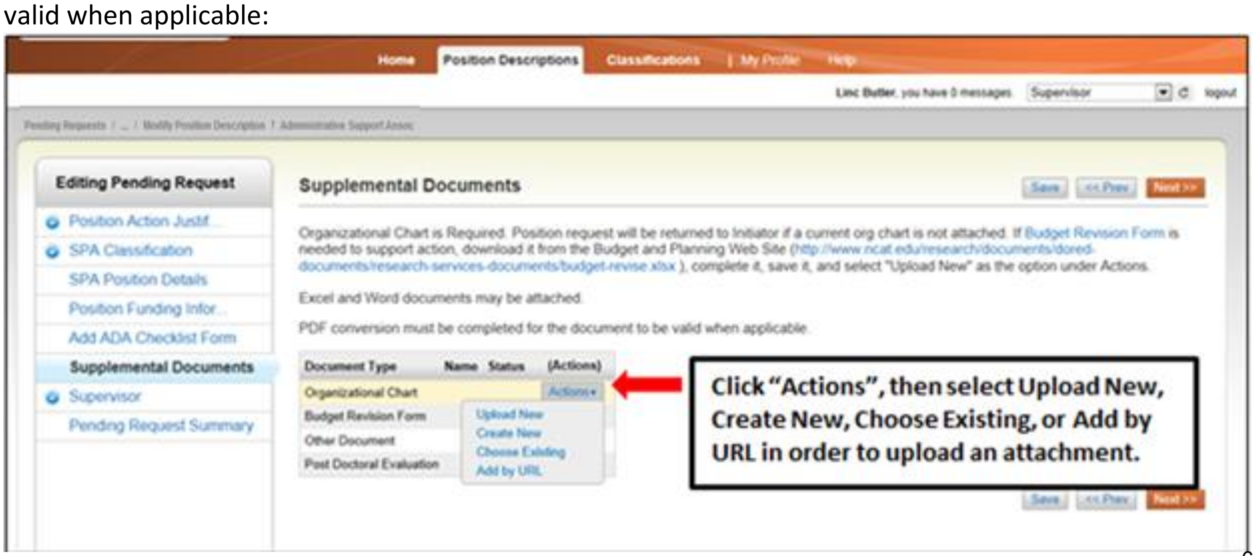
SHRA Modify - Supplemental Documents Tab

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:

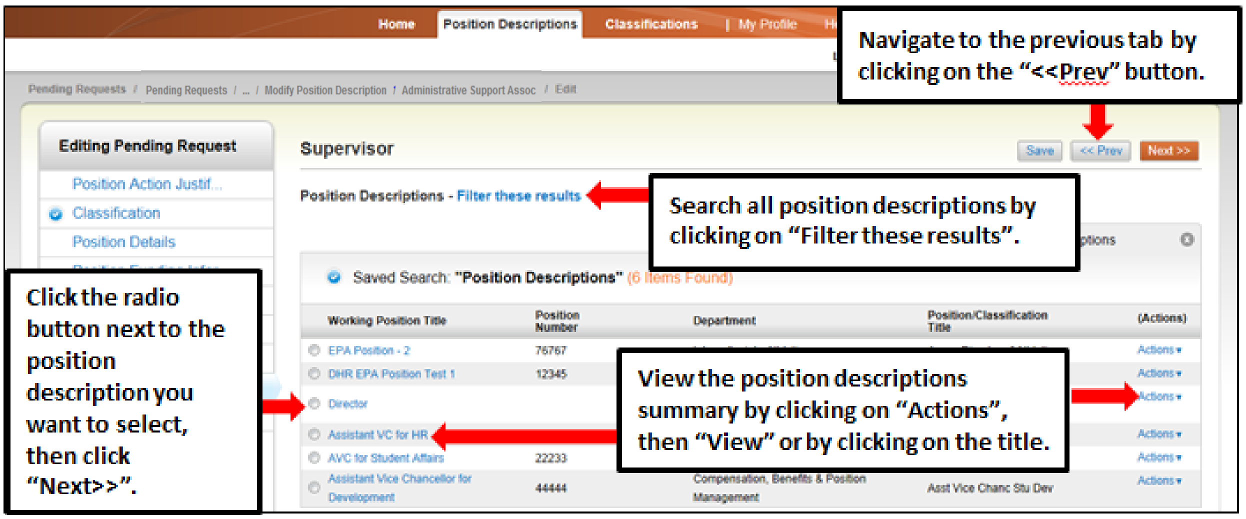


SHRA Modify - Supervisor Tab

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 Position Type 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.

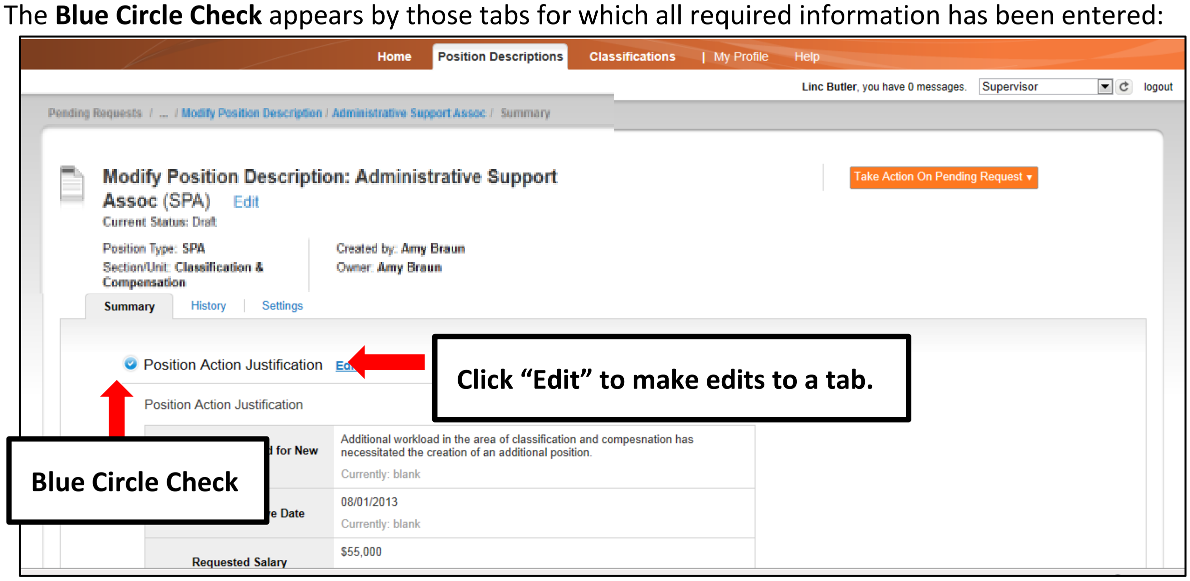
REMEMBER: The positions that appear in this list are based on your active user type (Supervisor, Department Head, Dean / Vice Chancellor):



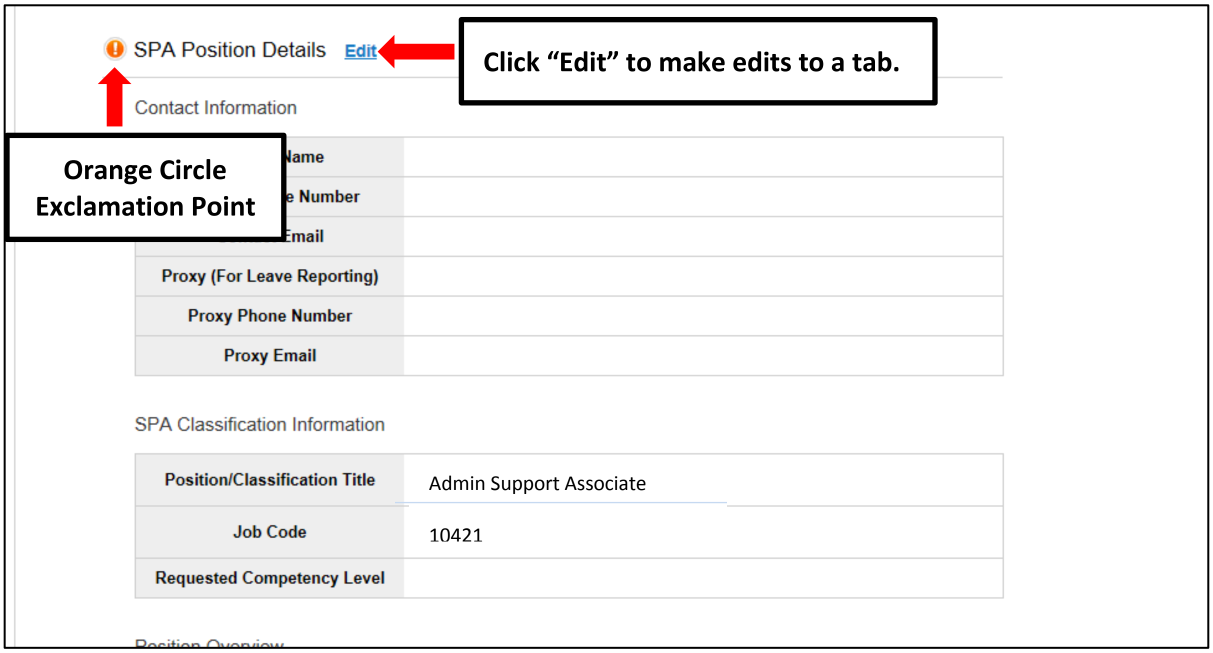
SHRA Modify - Pending Request Summary Tab

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.

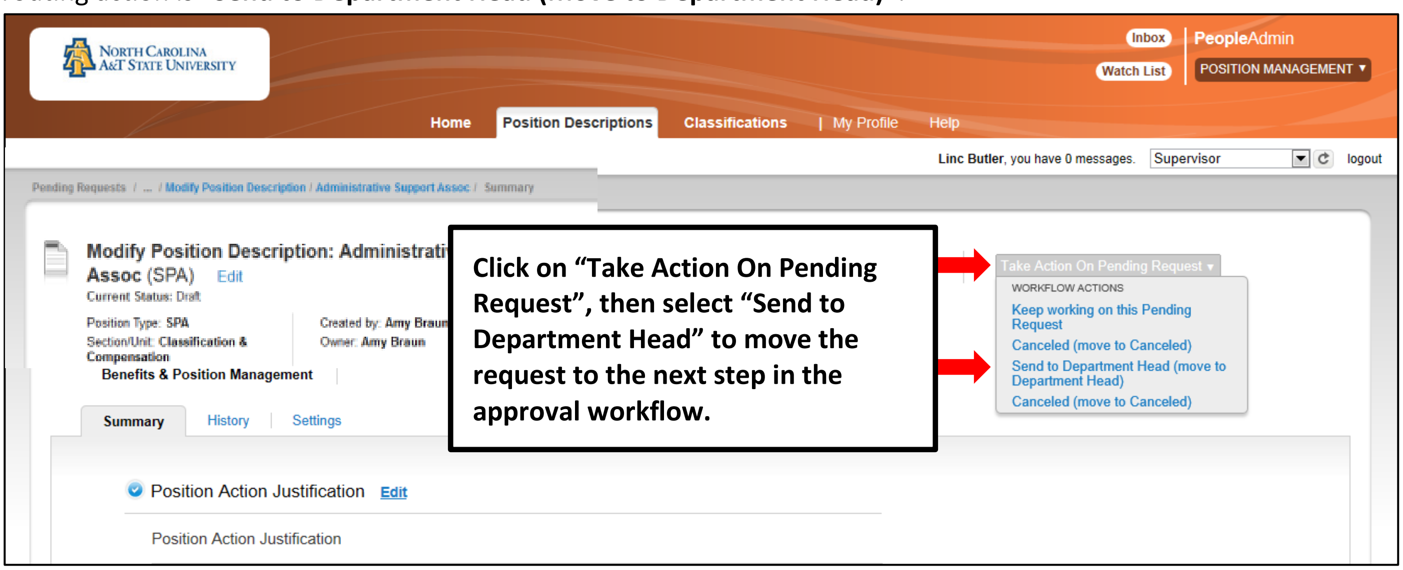
Please review the details of the position summary carefully before continuing.
The **Blue Circle Check** appears by those tabs for which all required information has been entered:



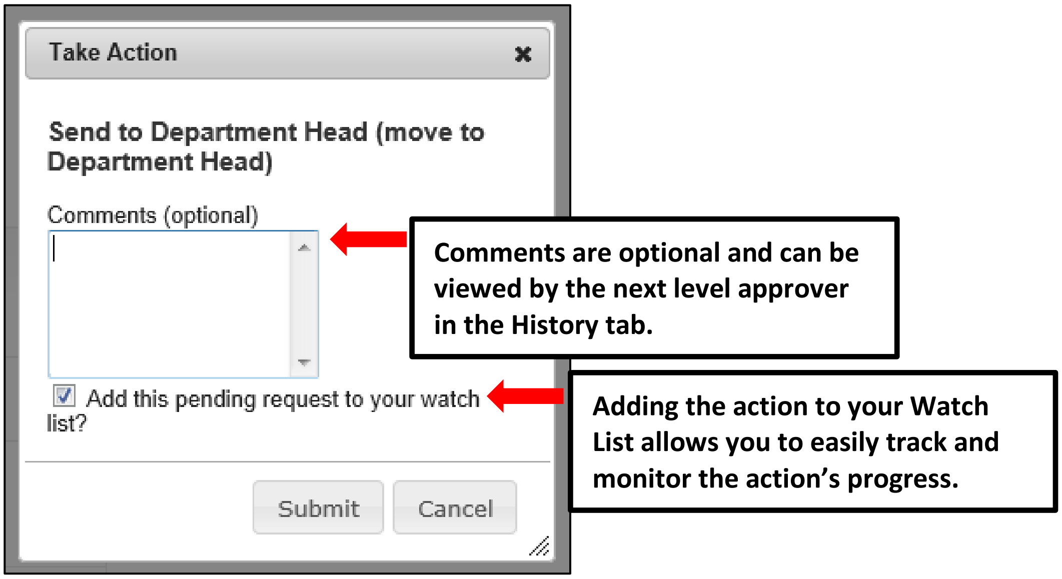
An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save",** and then return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



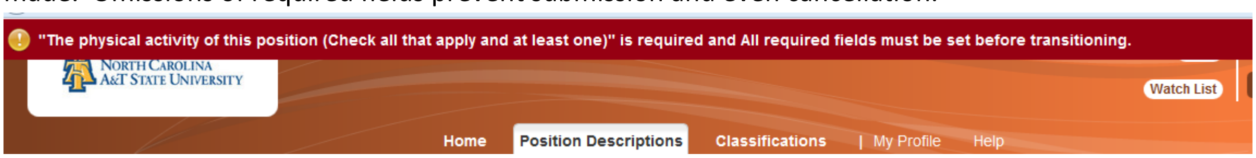
Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example,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



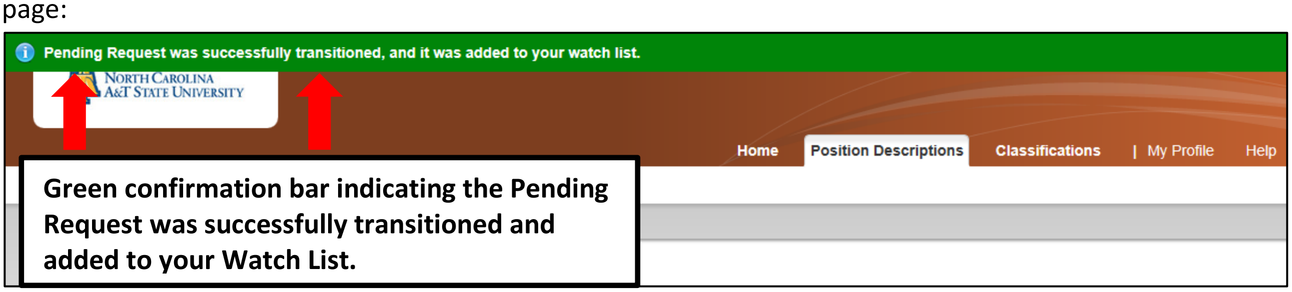
You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send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



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

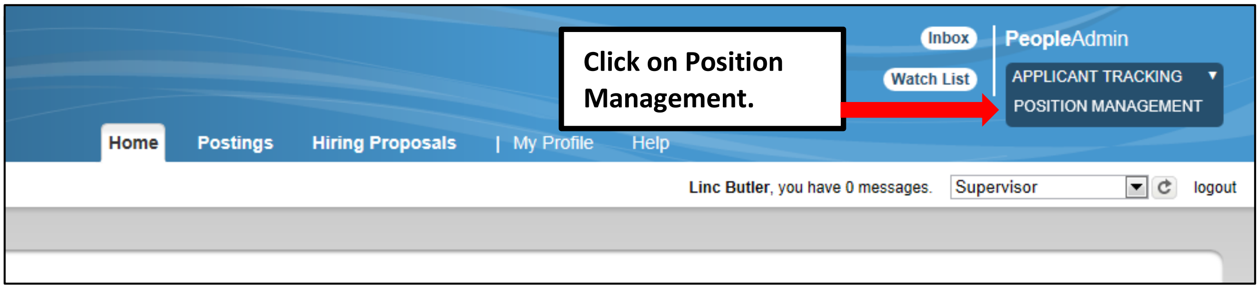


The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if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

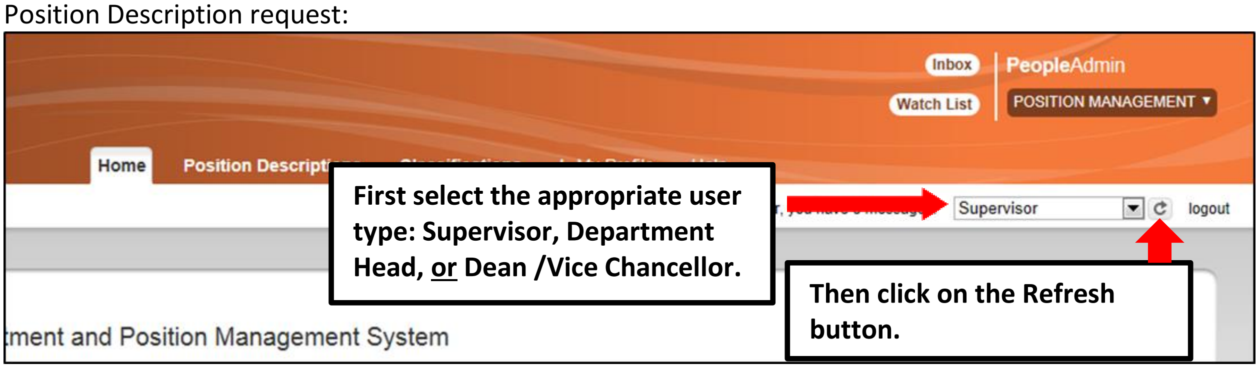
Modify Position Description – EHRA

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.

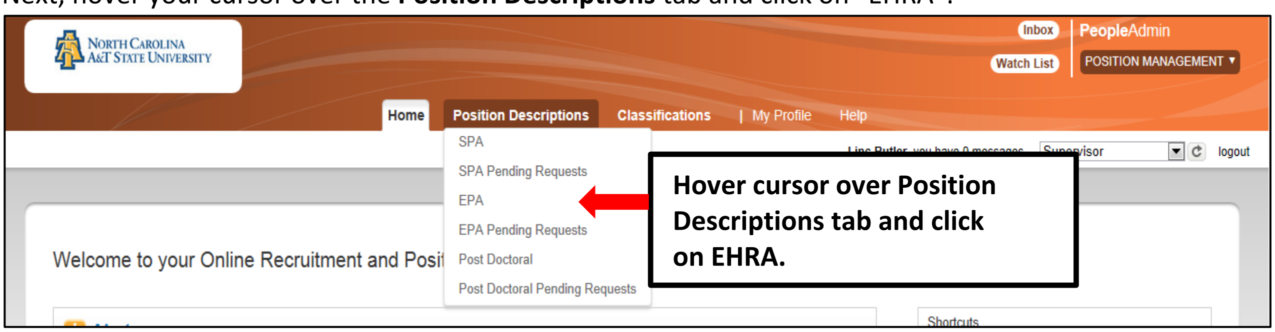
To initiate a Modify Position Description request for an EHRA position, first switch to the Position Management module using the drop down menu located in the top right corner of the



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:



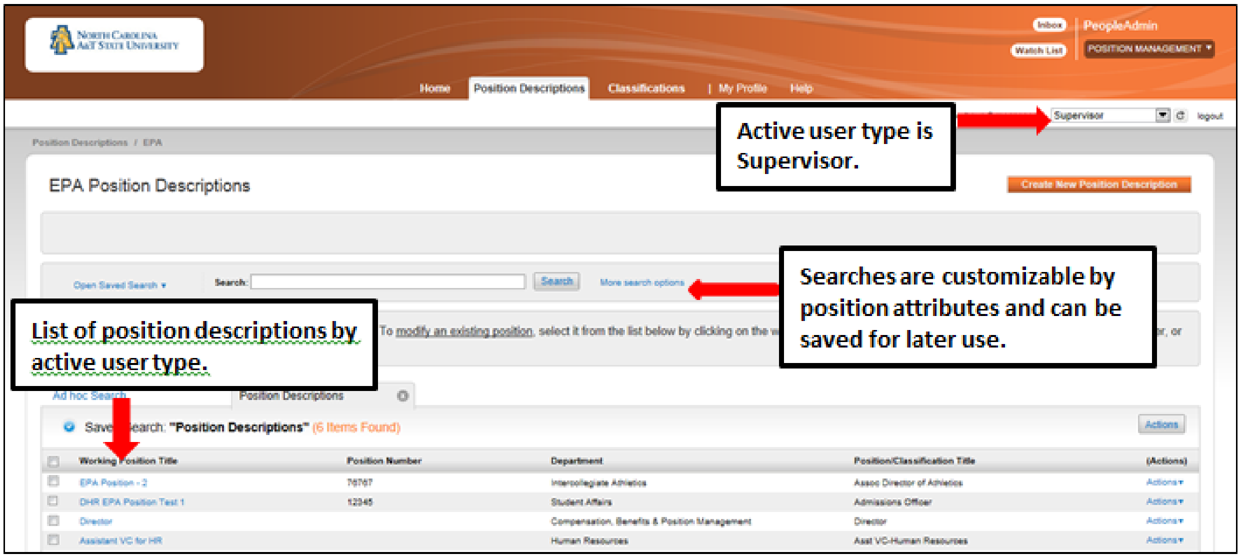
Next, hover your cursor over the **Position Descriptions** tab and click on "EHRA":



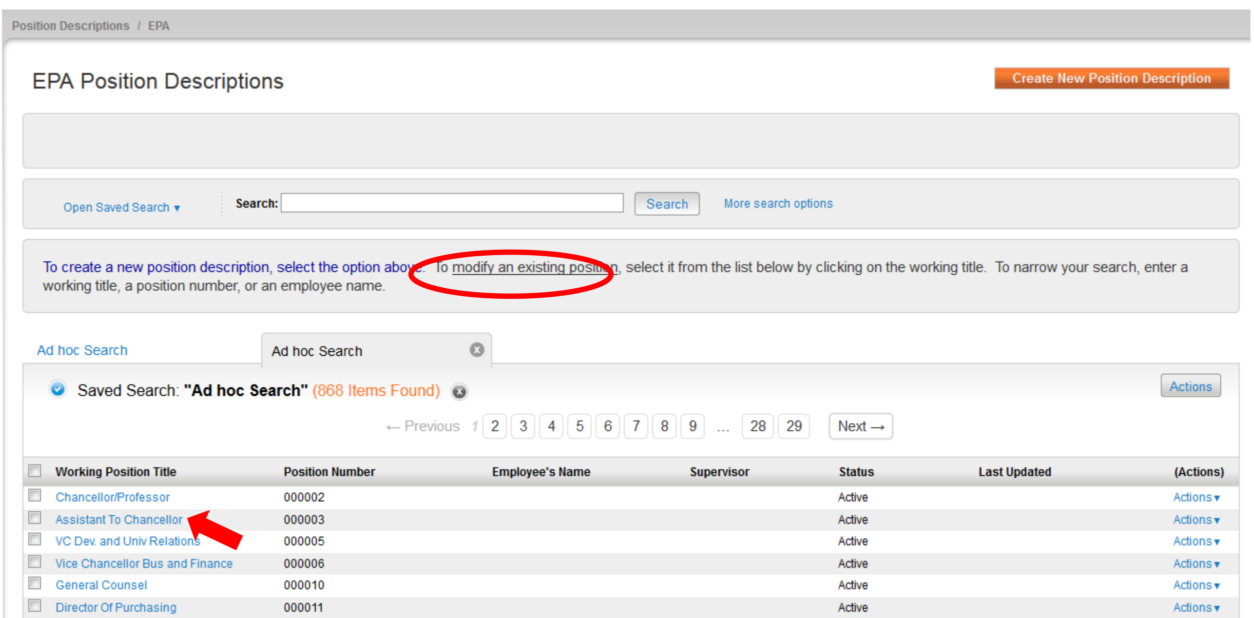
You will then be taken to the **Position Descriptions** view, which provides a list of all position descriptions based on your active user type as follows:

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.

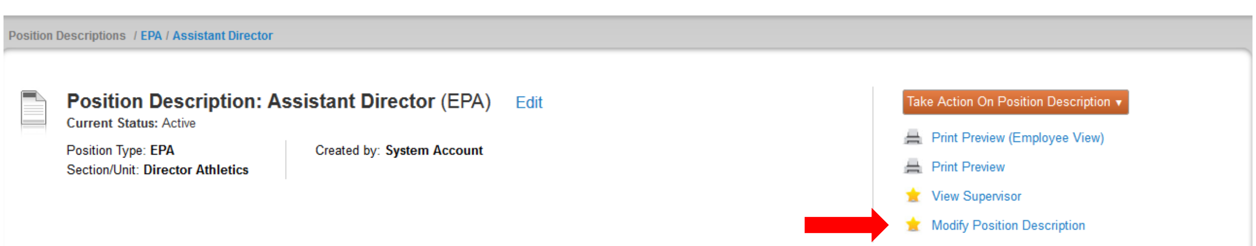
In the Position Descriptions view, you can search position descriptions by any number of criteria, including but not limited to position title, position number, employee name, supervisor name, or position status. Searches are fully customizable by position attributes, and you can save custom searches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



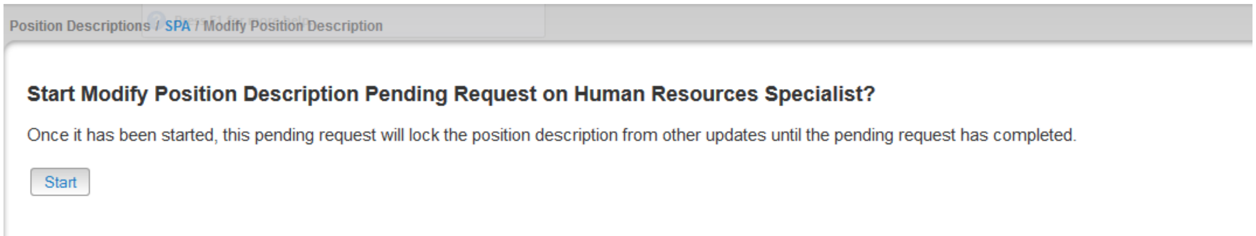
To initiate the request, select the position number you are modifying by clicking on the Working Position Title of the position.



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



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**":

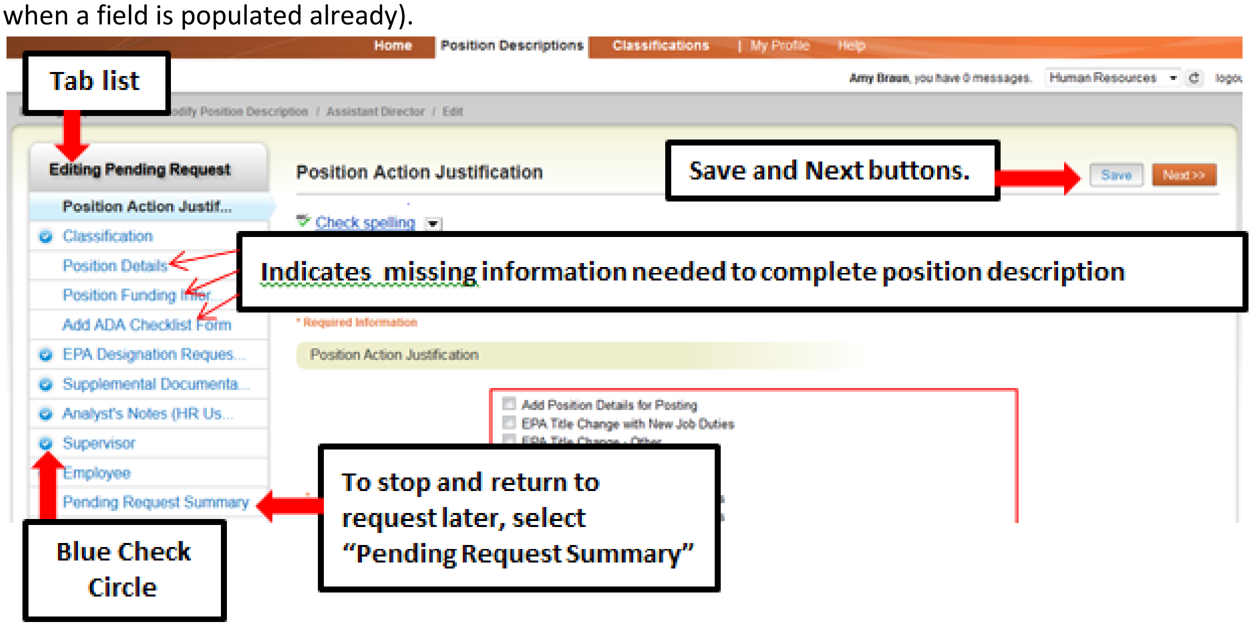


EHRA Modify - Edit Pending Request Page - General Navigation

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.

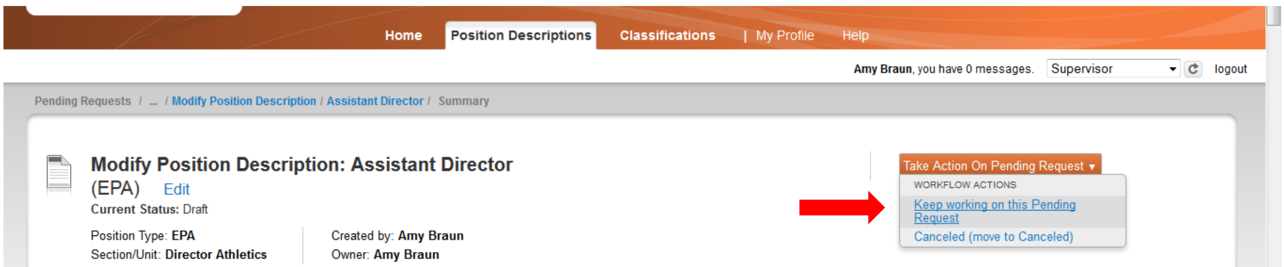
Required fields are highlighted in red and must be filled in before the Position Description can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a Blue Check Circle will appear beside the tab. The Blue Check Circle also appears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

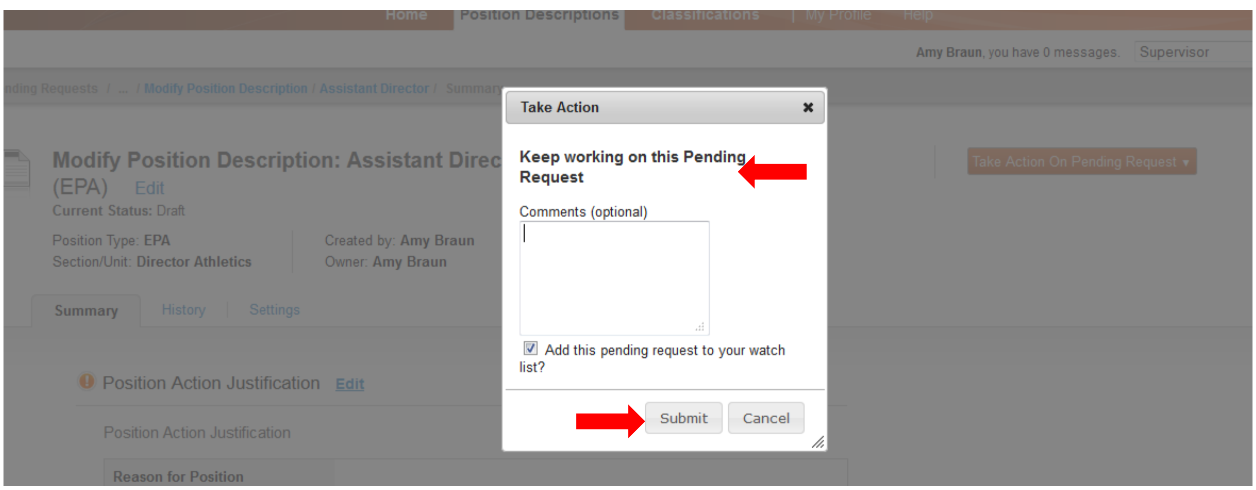


EHRA Modify - Saving to Return to a Pending Request Later

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"



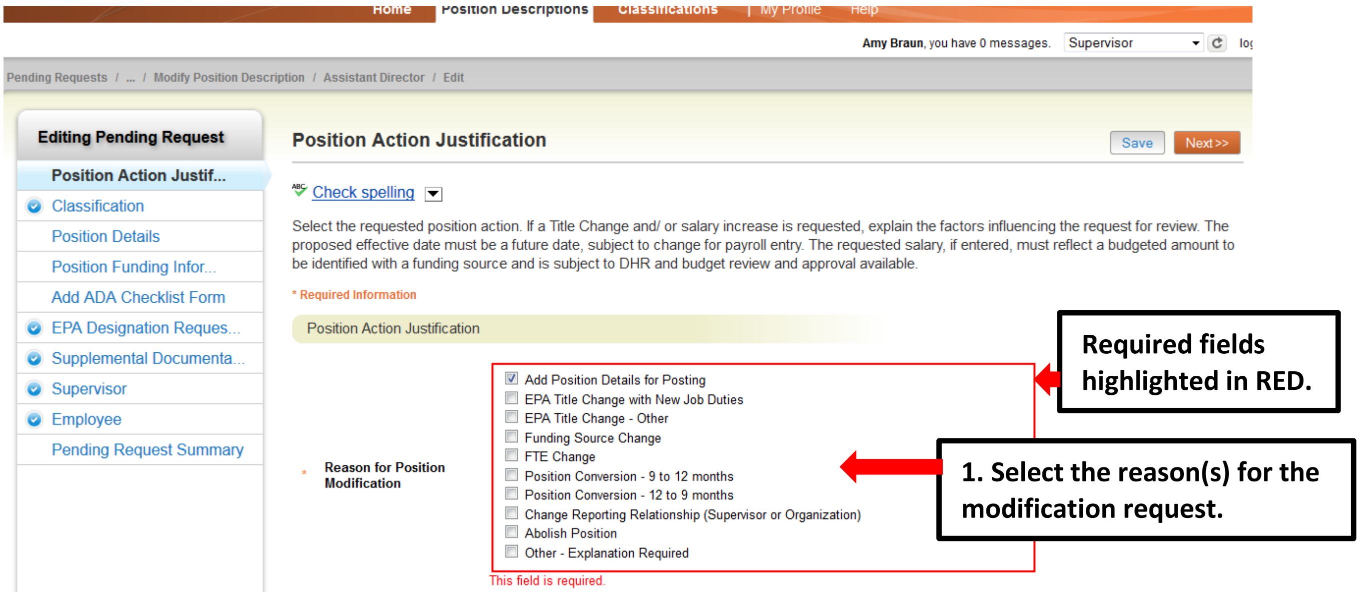


The **Pending Request** on this position description numbers can be located when you log into the Position Description module again as the same **User Type** you used to begin the action. Hover your cursor over the **Position Descriptions tab** and click on "**SHRA Pending Requests**."

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.

EHRA Modify - Position Action Justification Tab

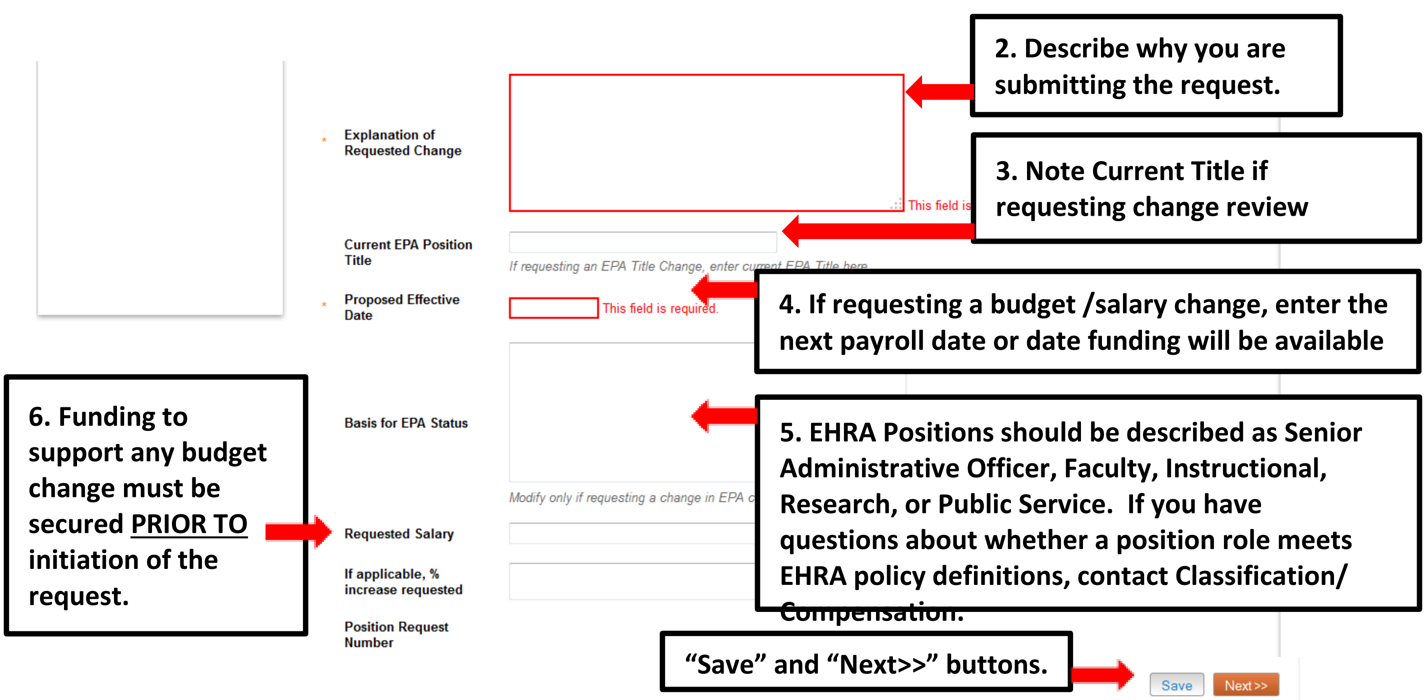
The “**Modify Position**” action in PeopleAdmin 7 allows for a variety of actions to be requested and completed. These selections differ based on the classification of the position being modified. At least one option must be selected, but in some cases more than one option will be applicable (For example, 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.

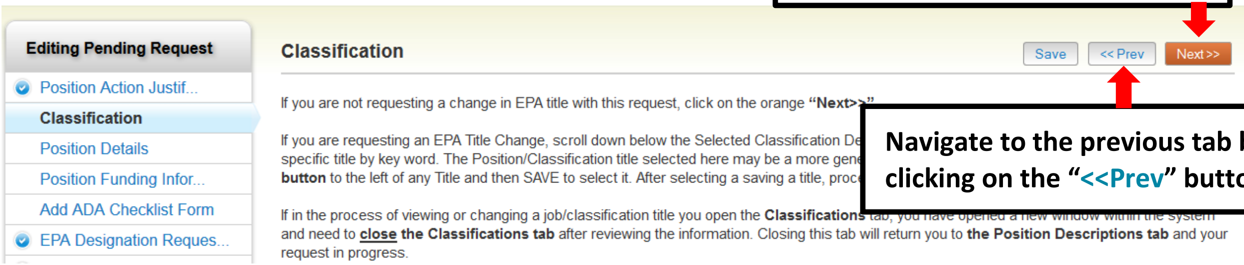
If you are requesting an **EHRA Title Change**, please note the current title in the designated field. Follow any other instructions; then click the orange “**Next>>**” button (located at both top and bottom right corners) to save changes and navigate to the next tab:



EHRA Modify - Classification Tab

If you are ***not*** requesting a change in EHRA title with this request, click **Next>>** located in the orange box at the top right-hand corner of the page.

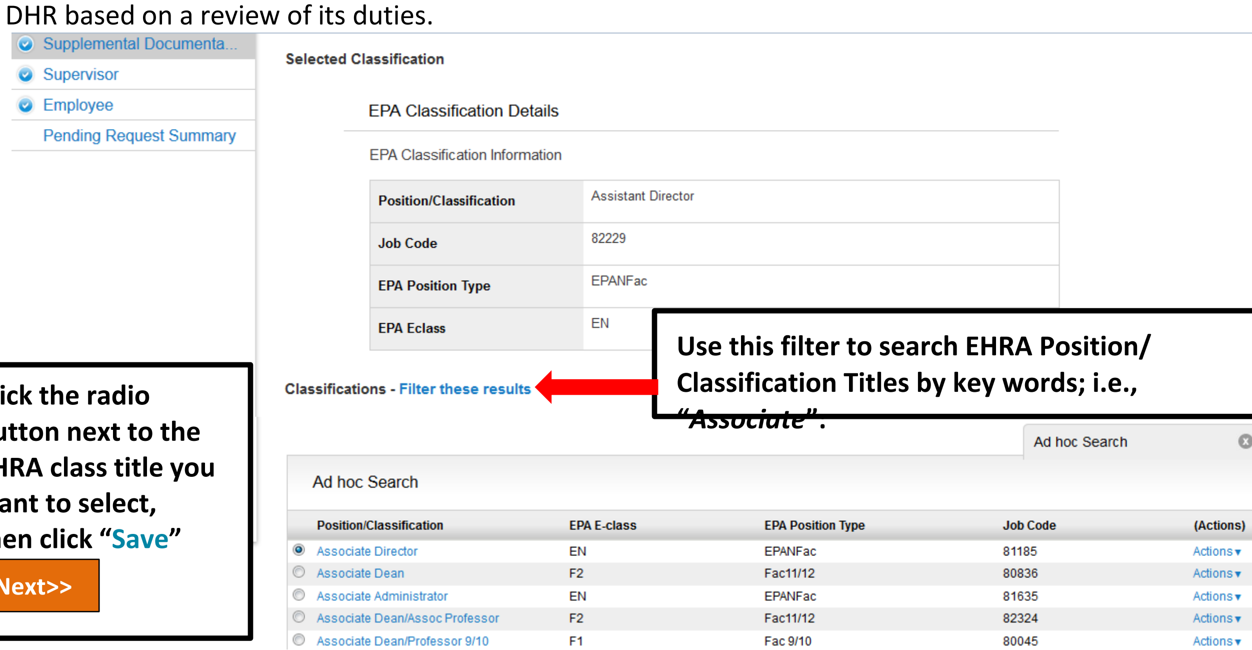
If Title is not changing, click here



Navigate to the previous tab by clicking on the "<<Prev" button.

If you are requesting an **EHRA Title Change**, *scroll down* 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 left of any Title and then **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.



Use this filter to search EHRA Position/ Classification Titles by key words; i.e., "Associate".

Click the radio button next to the SHRA class title you want to select, then click "Save"

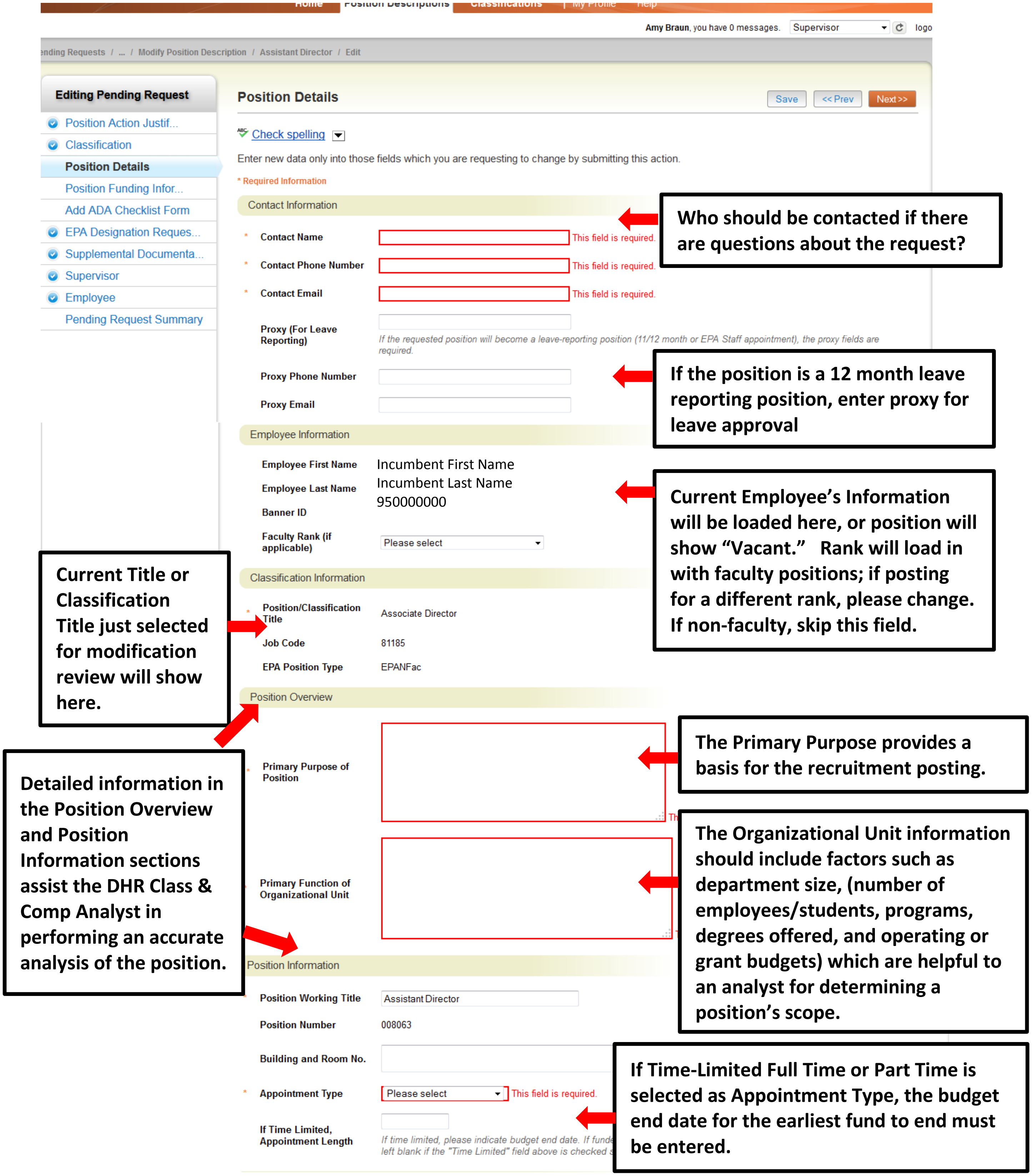
Next>>

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 ***close*** 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 *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 (illustrated above).

EHRA Modify - Position Details Tab

Please note that the *first* 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 *need to be revised* will have to be identified for editing.



EHRA Modify – Position Details Tab – Primary Responsibilities and Duties

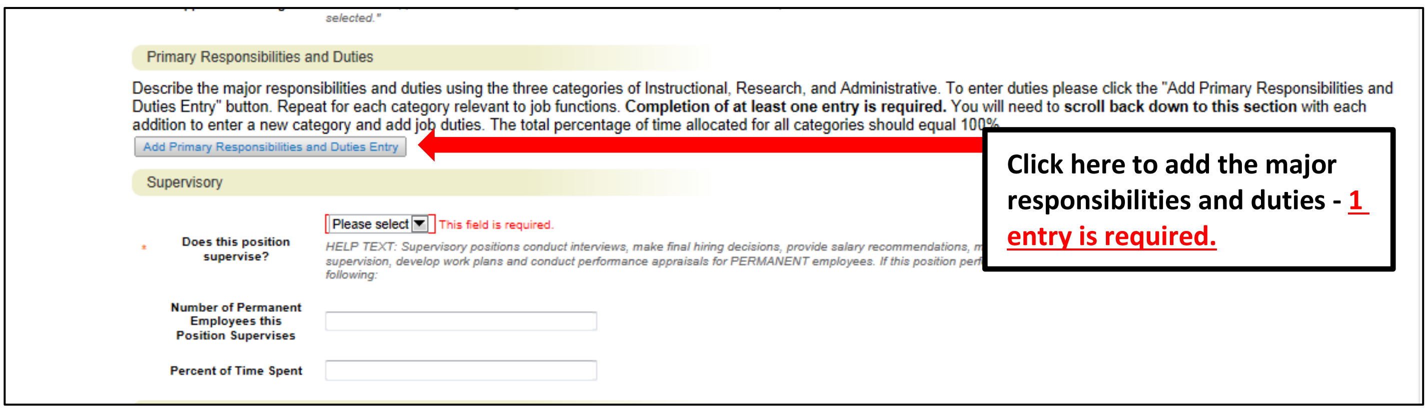
The next section of the Position Details tab is used to build **current duties and responsibilities** into the position. It is the *most important section* of a position description request, but easily missed by first-time users. Please read and follow all instructions in this area to ensure that your 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.

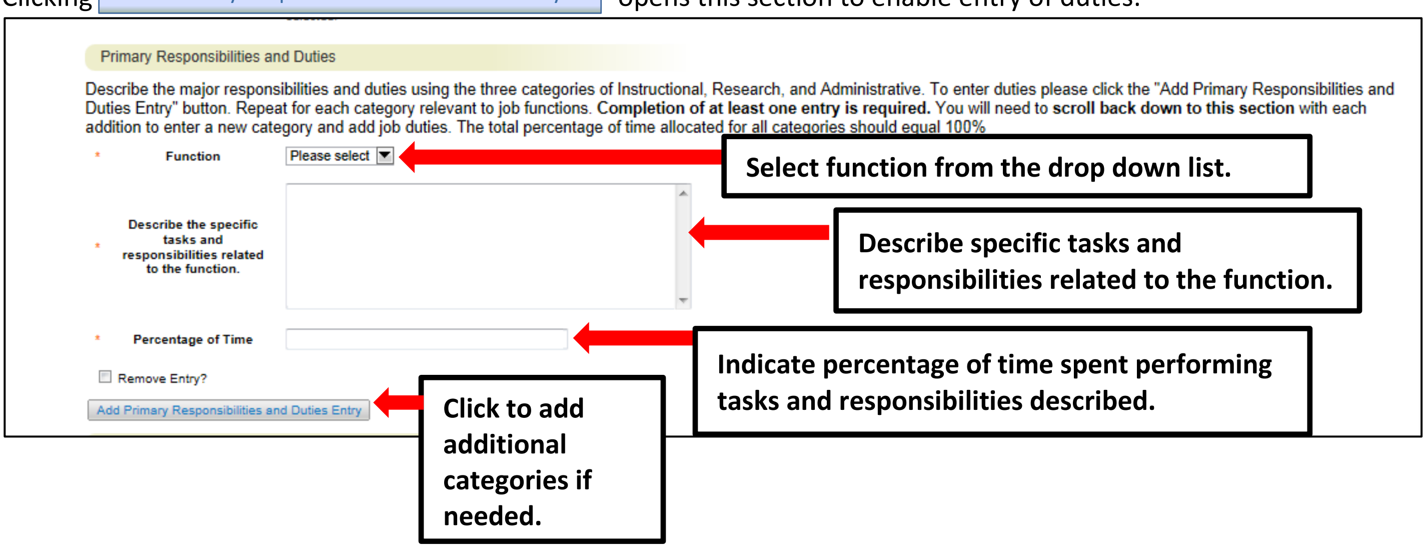
To enter duties, click on the key button, "**Add Primary Responsibilities and Duties Entry**." A pull-down list of the three categories will allow you to select the primary function first. Type in duties and examples of assigned work relevant to the primary function, and assign an approximate percentage 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 ***scroll down*** 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%:

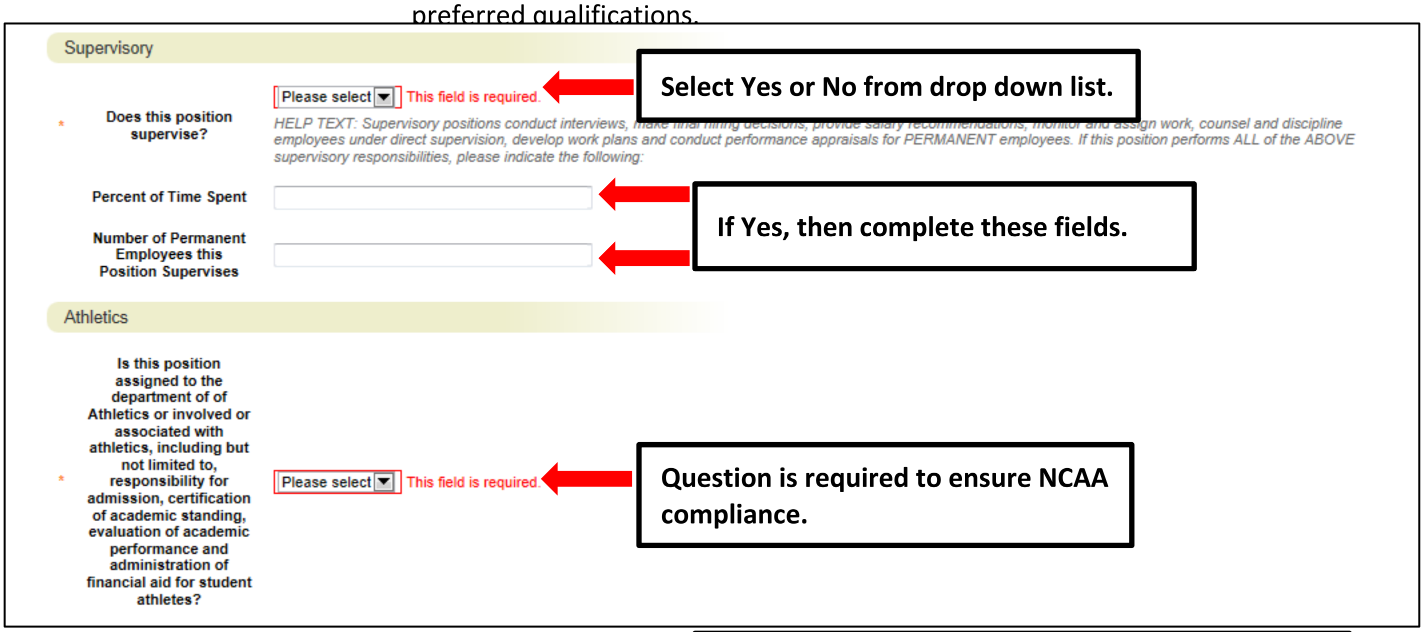


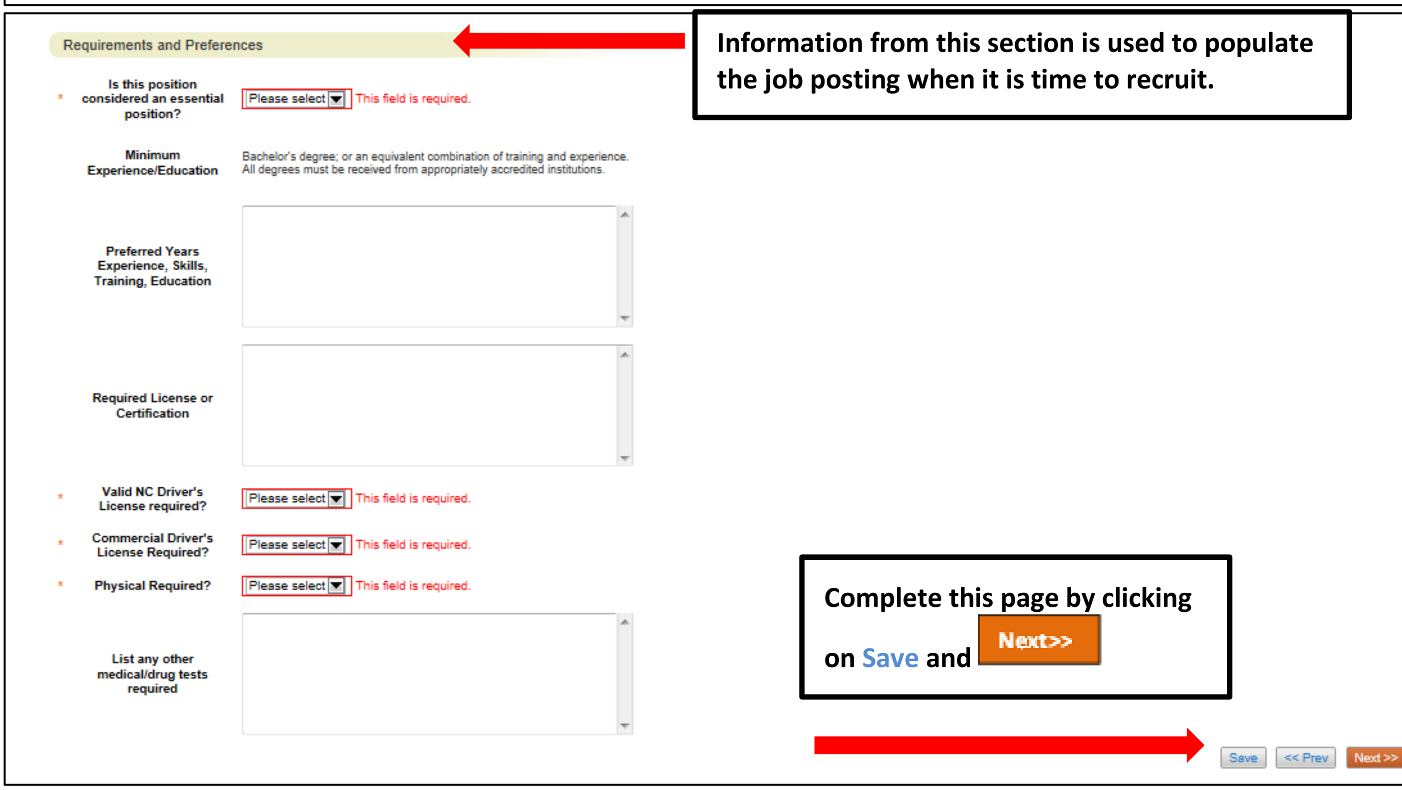
Clicking **Add Primary Responsibilities and Duties Entry** opens this section to enable entry of duties:



EHRA Modify – Position Details – Compliance and Requirements

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





EHRA Modify - Position Funding Information Tab

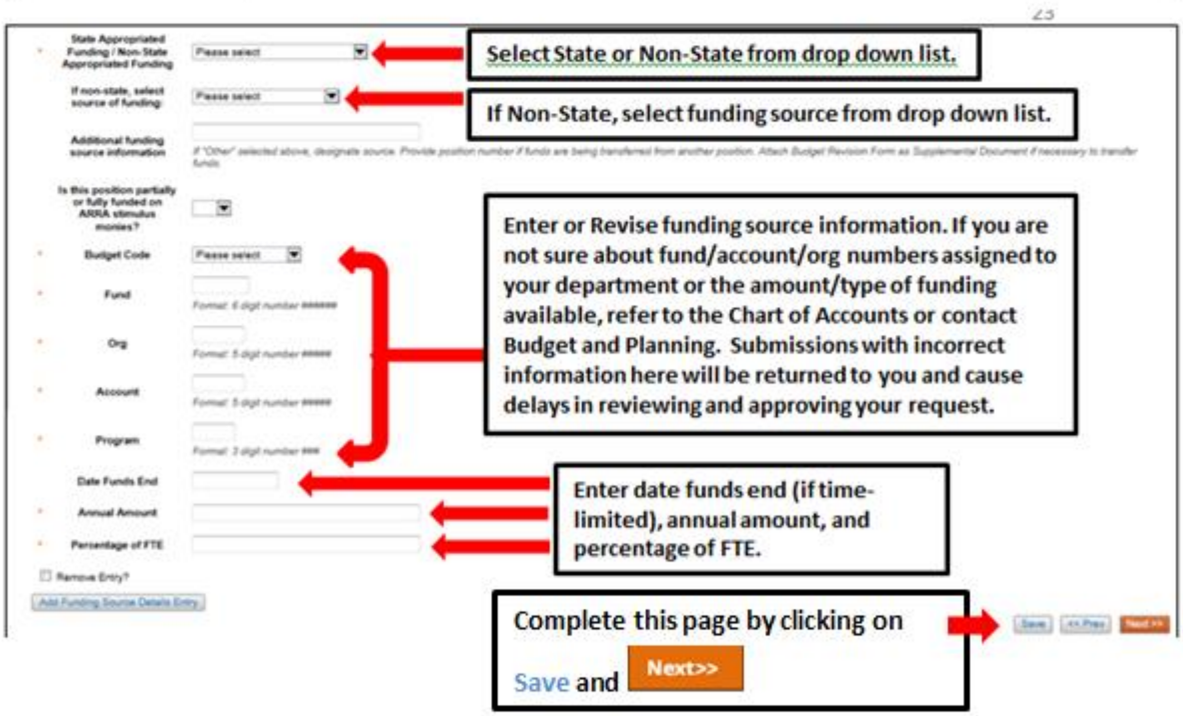
In the **Funding Source Details** section of this tab, you will confirm existing or enter new fund sources to support the request. If you are modifying a position to change the funding source, you will need to type over any existing fund, account, program and org codes to replace the numbers with new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

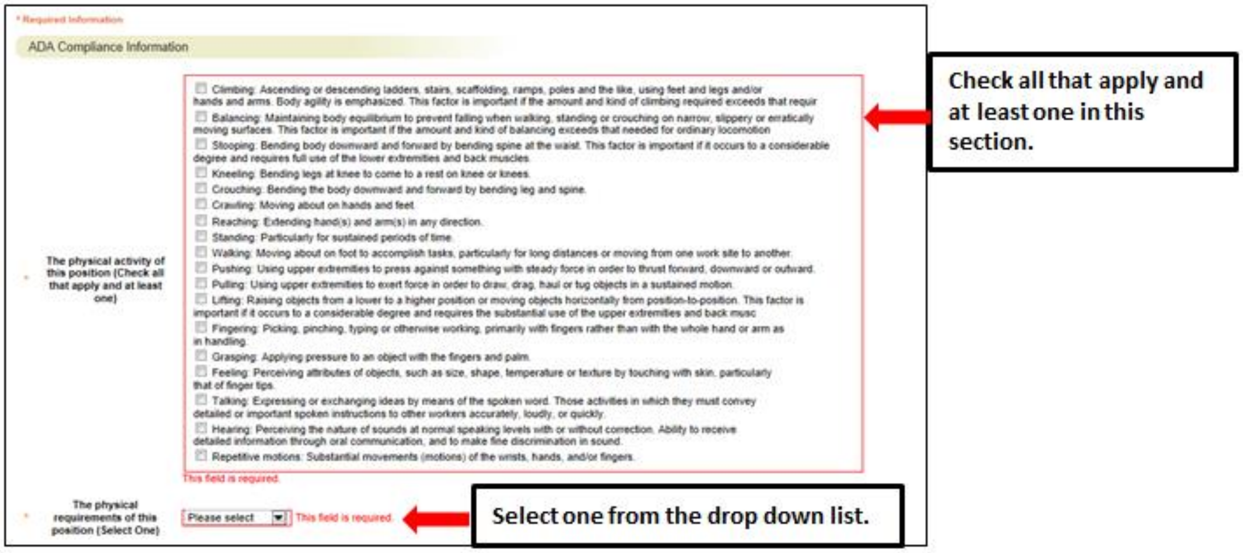
The ADA checklist is used to determine the general physical requirements, physical activities, visual acuity, and working conditions of positions in order to be compliant with the provisions of the Americans with Disabilities Act of 1990.

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:

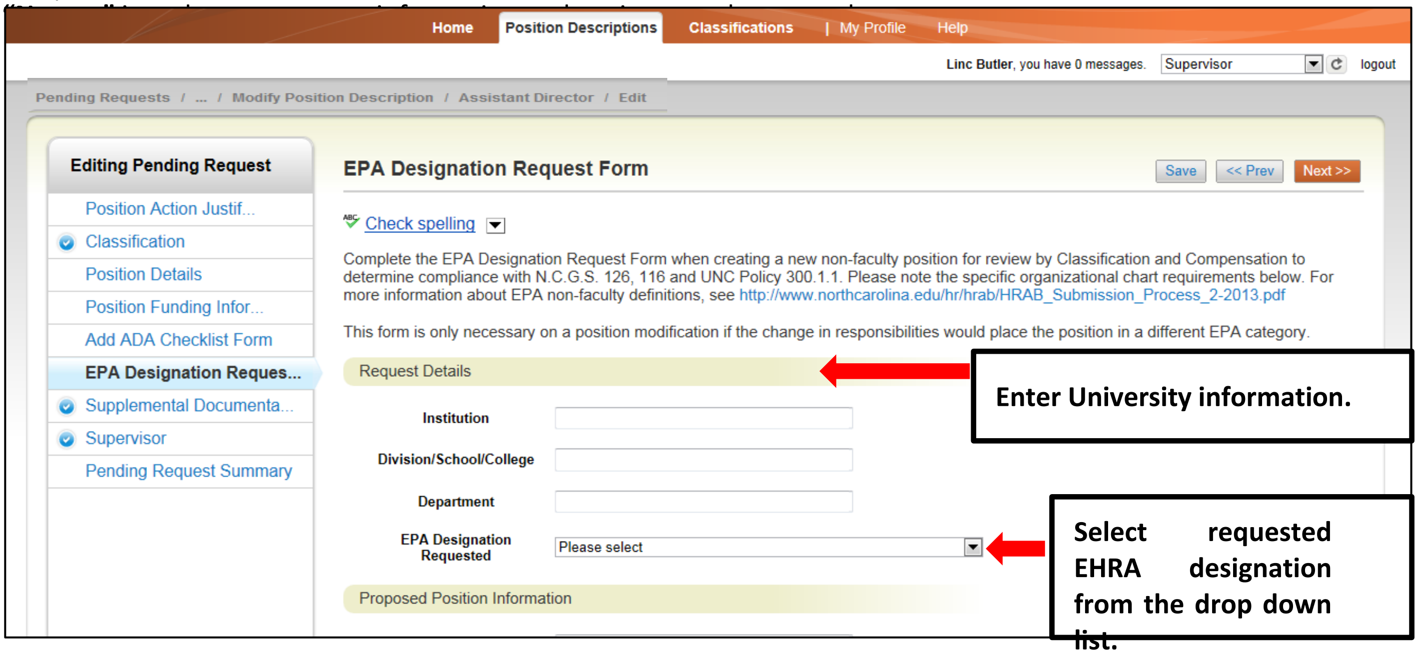
- The physical activity of the position (Check all that apply and at least one)
- The physical requirements of the position (Select one from the drop down list)

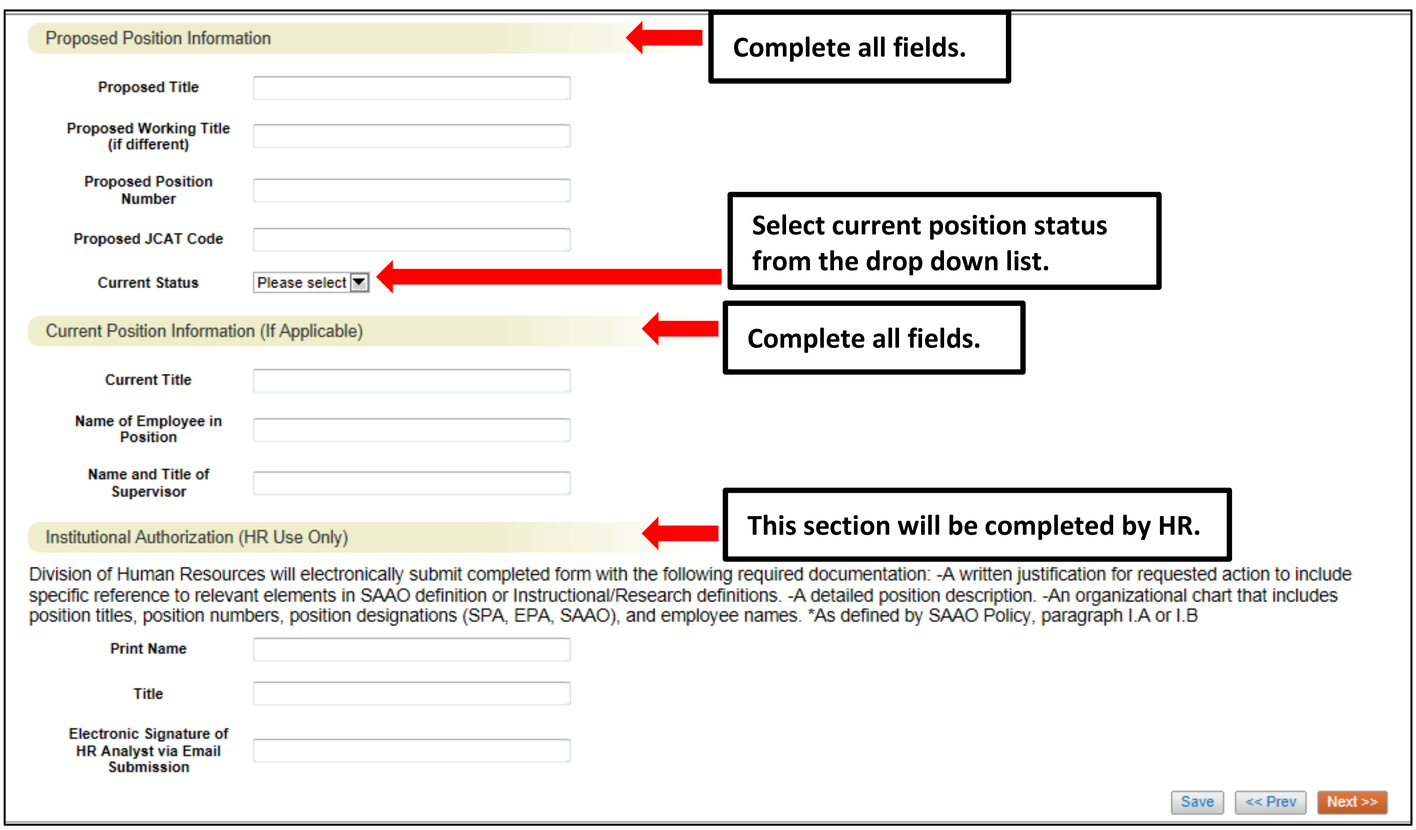
- The visual activity requirements including color, depth perception, and field of vision (Check all that apply and at least one)
- The condition the worker will be subject to in the position (Check all that apply and at least one)



EHRA Modify - Designation Request Form Tab

Complete the EHRA Designation Request Form ***only when*** 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





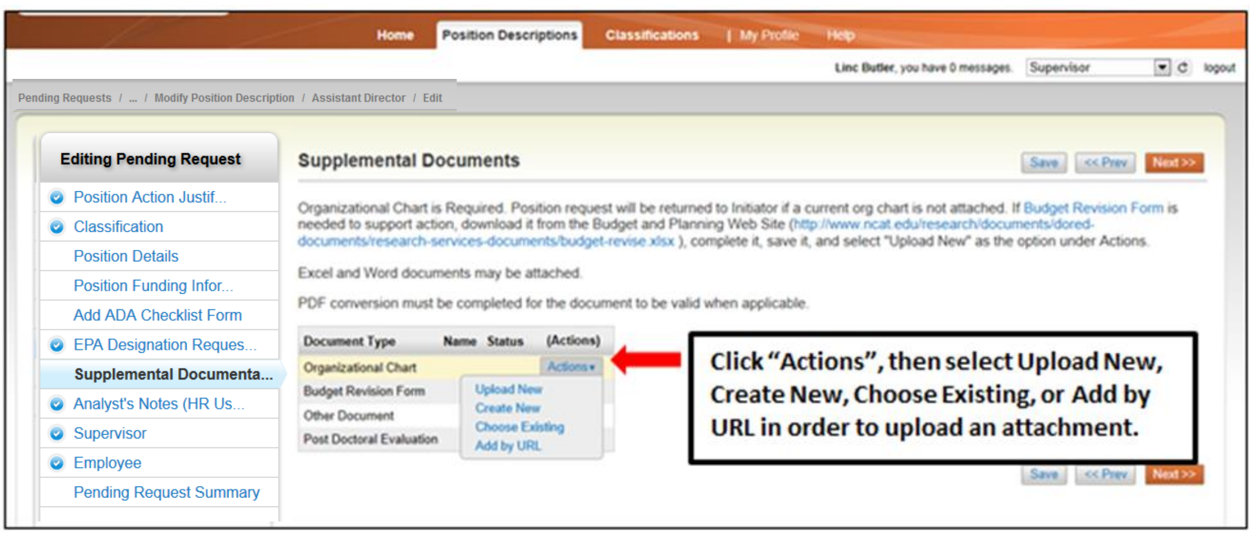
EHRA Modify - Supplemental Documents Tab

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:

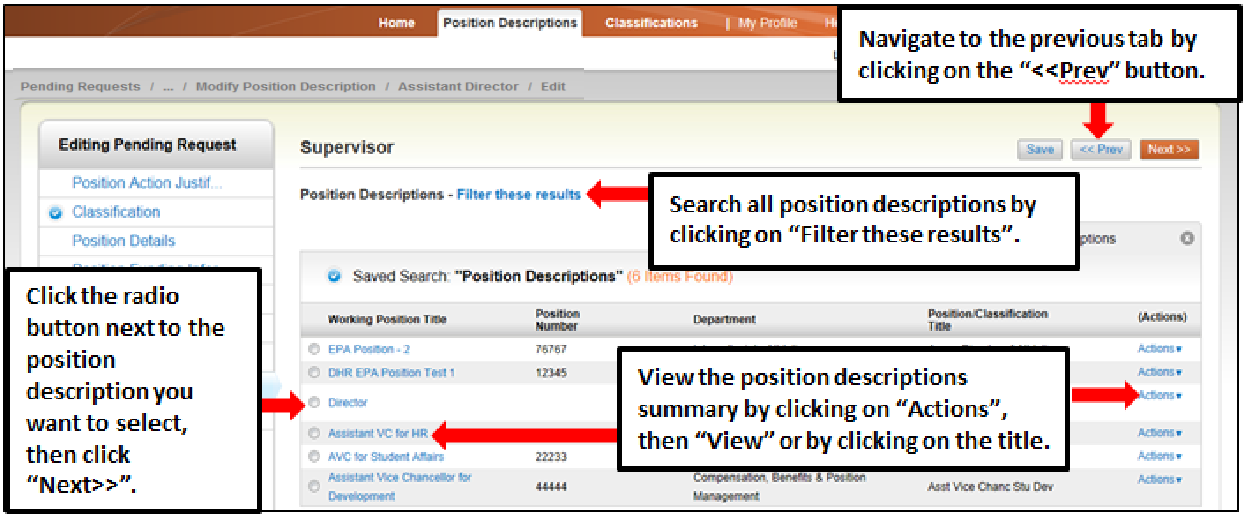


EHRA Modify - Supervisor Tab

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 Position Type 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):

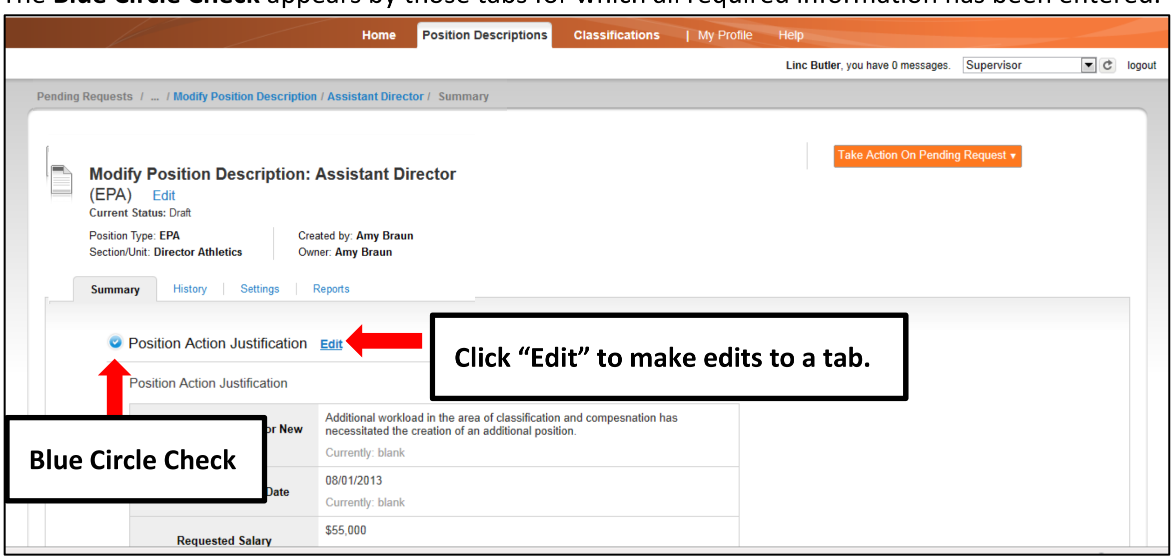


EHRA Modify - Pending Request Summary Tab

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.

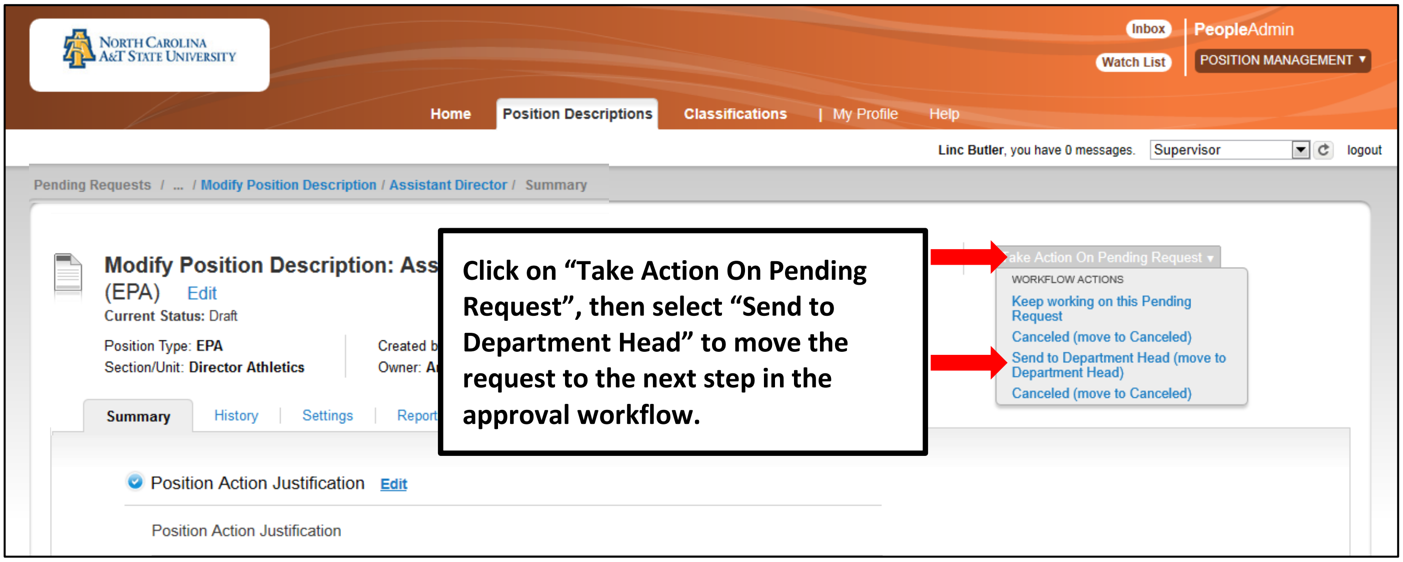
Please review the details of the position summary carefully before continuing.

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

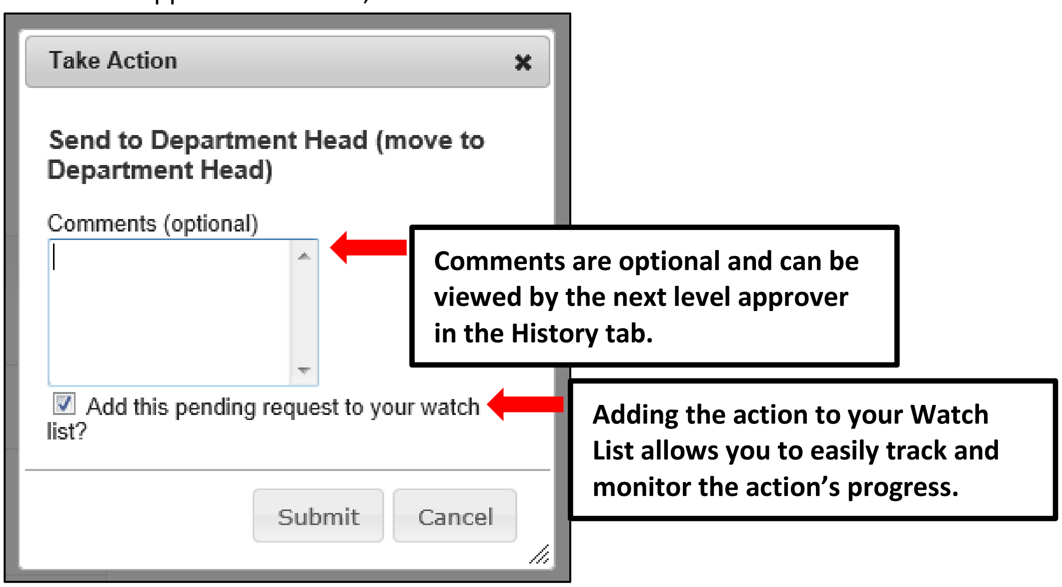


An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save",** and then return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

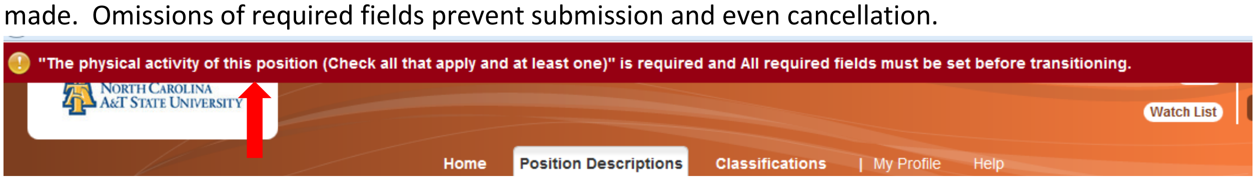
Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example,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



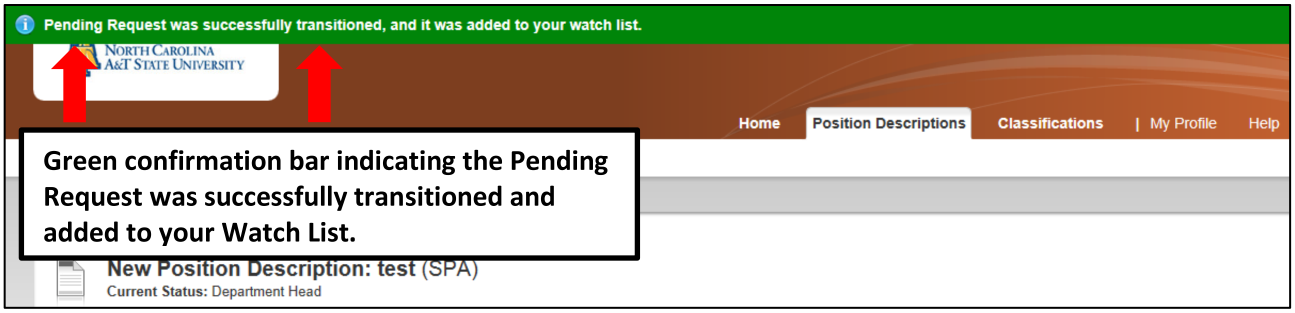
You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send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



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



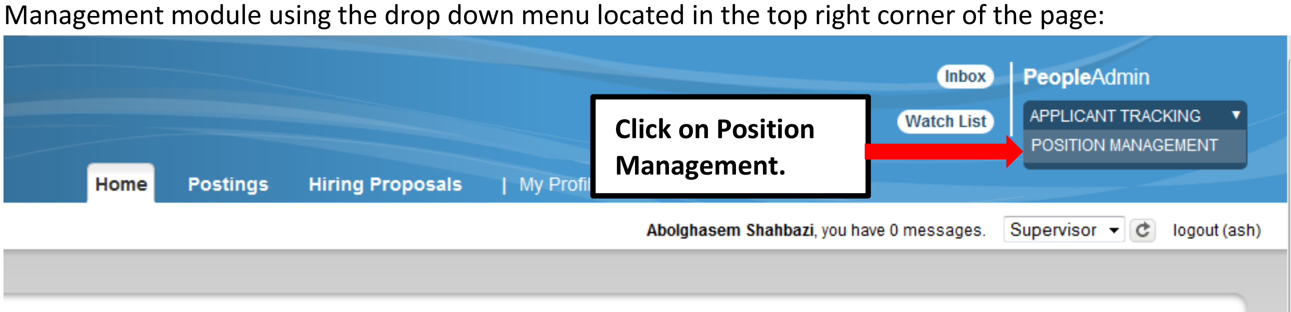
The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if 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 – Post Doctoral

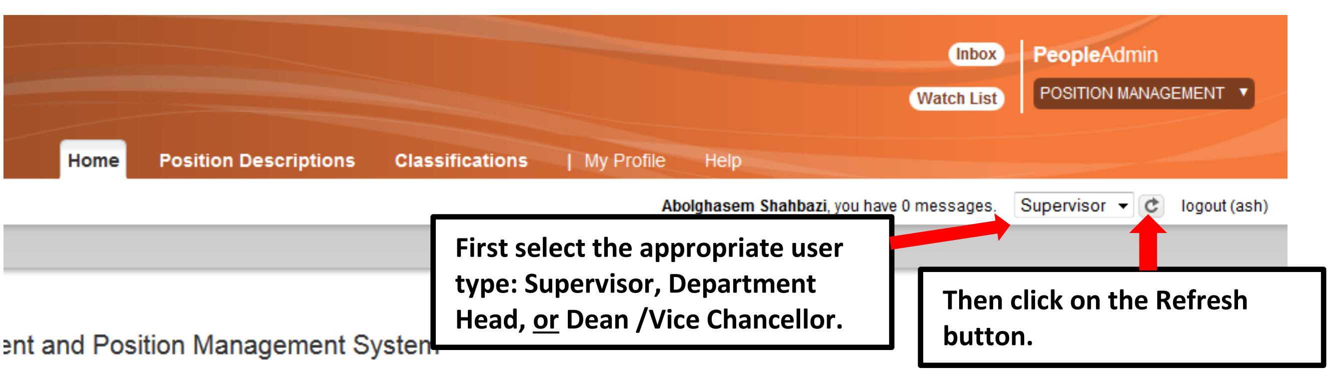
Prior to requesting a reappointment for a Postdoctoral Associate position, Principal Investigators (PI) should review the Postdoctoral Scholars Policy. Approval for post doctoral reappointments positions must be granted by the Vice Chancellor for the Division of Research and Economic Development (DORED) 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.

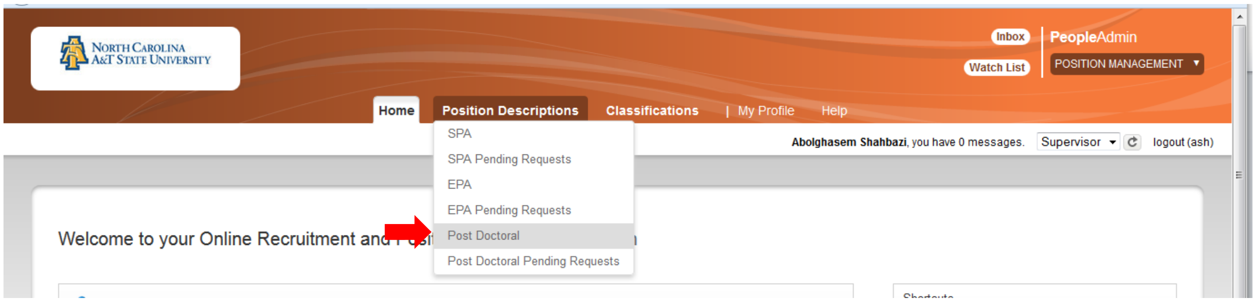
To initiate a Modify Position Description request for an Post Doctoral position, first switch to the Position Management module using the drop down menu located in the top right corner of the page:



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:



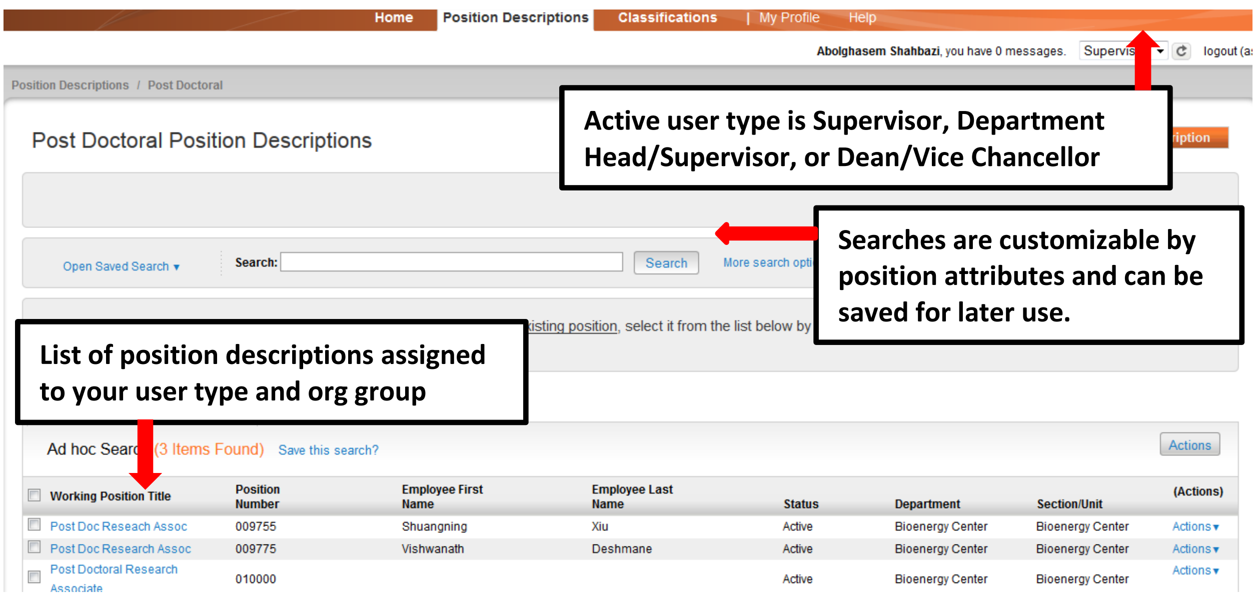
Next, hover your cursor over the **Position Descriptions** tab and click on "Post Doctoral":



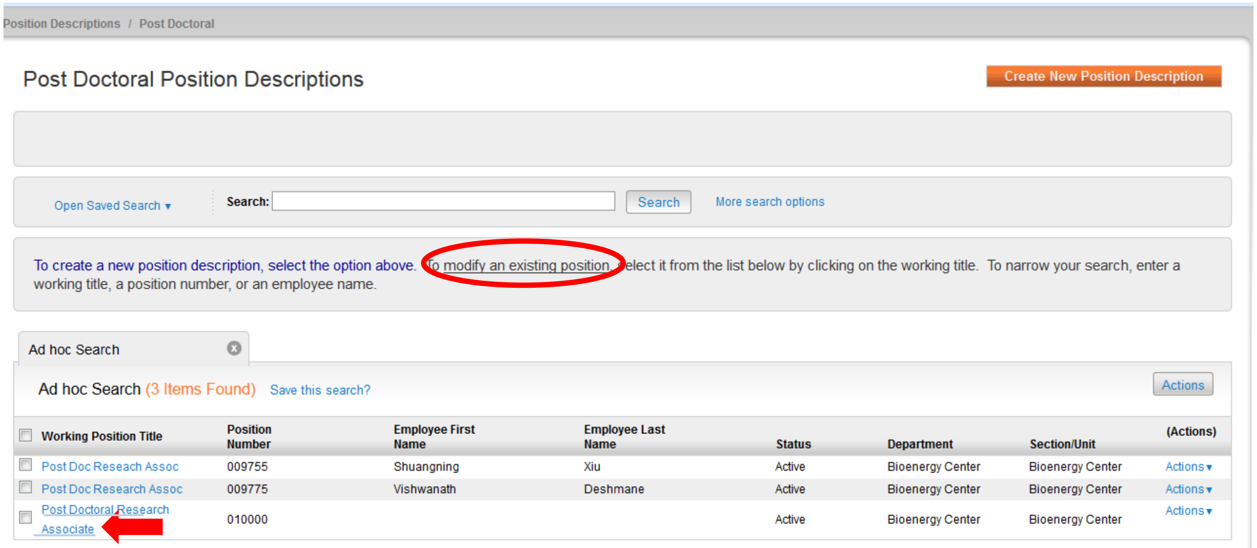
You will then be taken to the **Position Descriptions** view, which provides a list of all position descriptions based on your active user type as follows:

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.

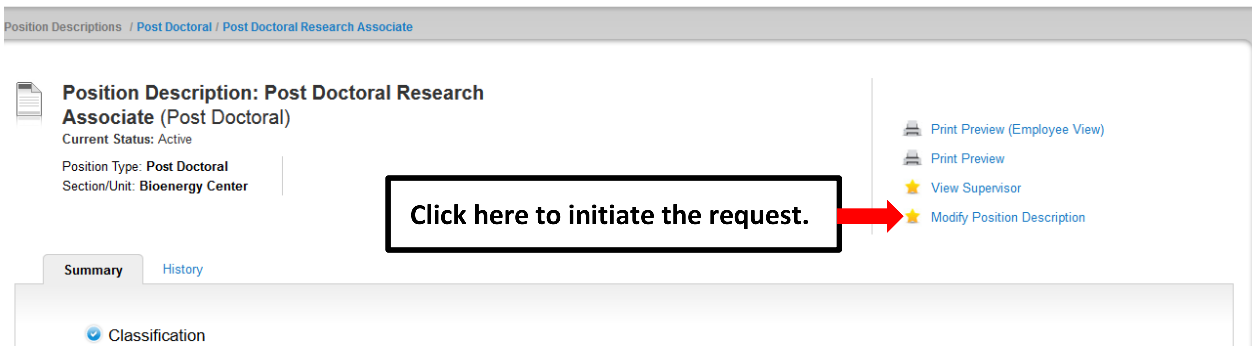
In the **Position Descriptions** view, you can search position descriptions by any number of criteria, including but not limited to position title, position number, employee name, supervisor name, or position status. Searches are fully customizable by position attributes, and you can save custom searches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



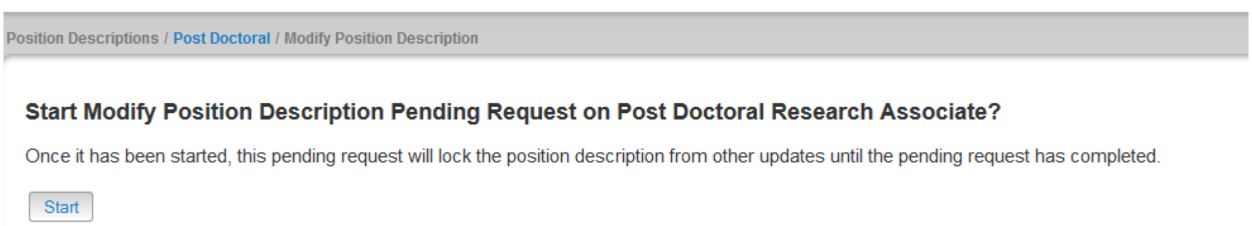
To initiate the request, select the position number you are modifying by clicking on the Working Position Title of the position.



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



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



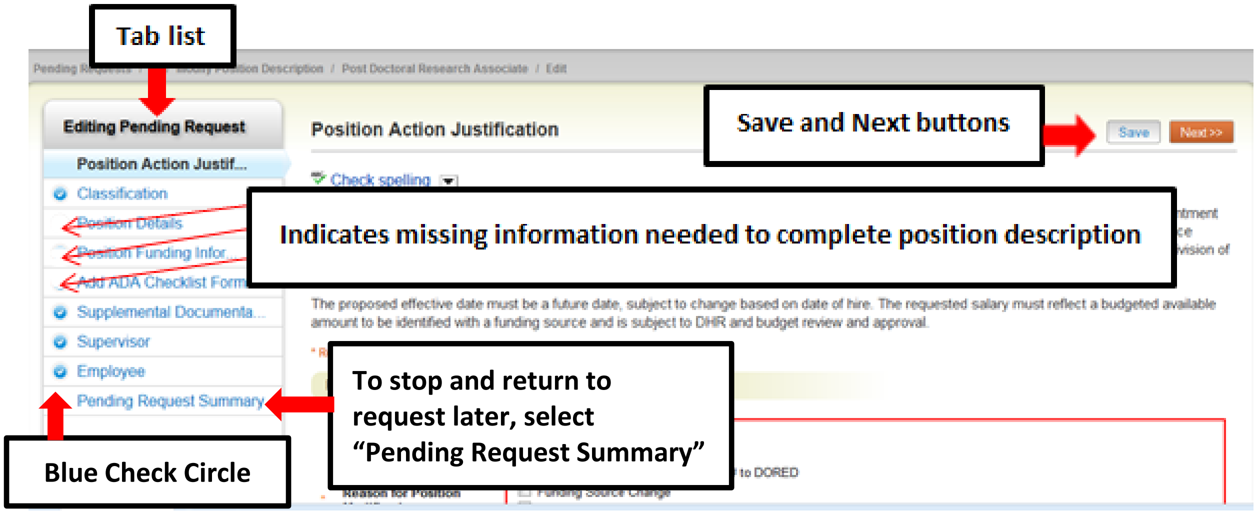
Post Doctoral Modify - Edit Pending Request Page - General Navigation

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).

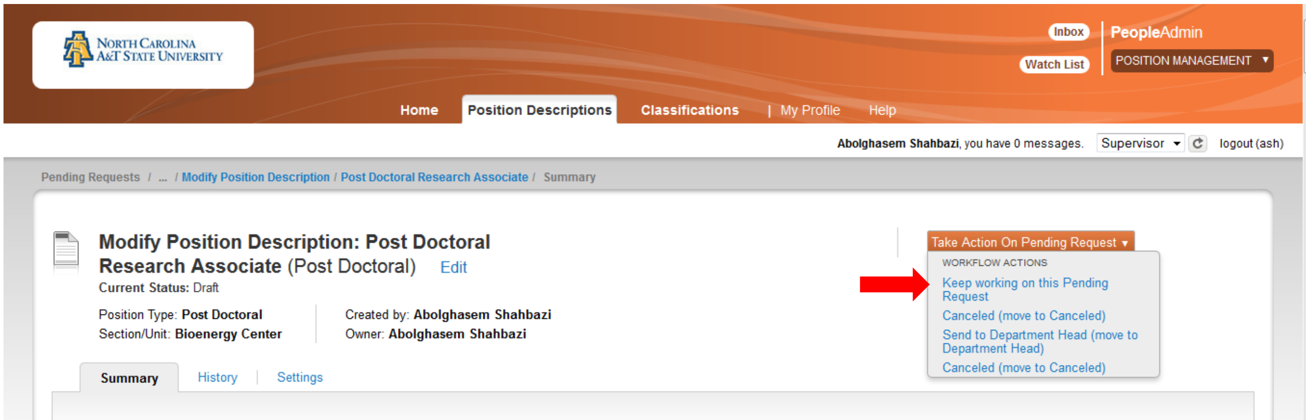
Required fields are highlighted in **red** and must be filled in before the Position Description can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check Circle**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



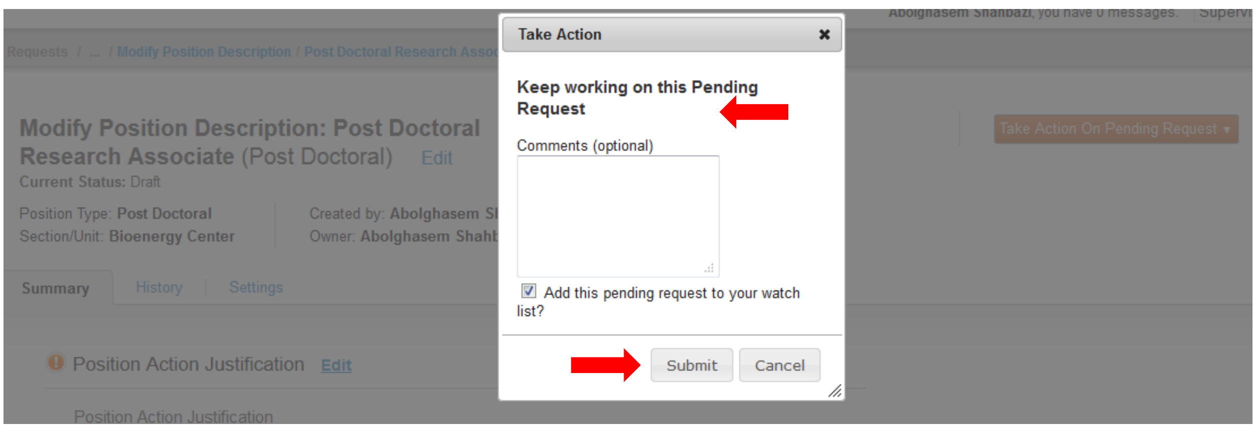
Post Doctoral Modify - Saving to Return to a Pending Request Later

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"

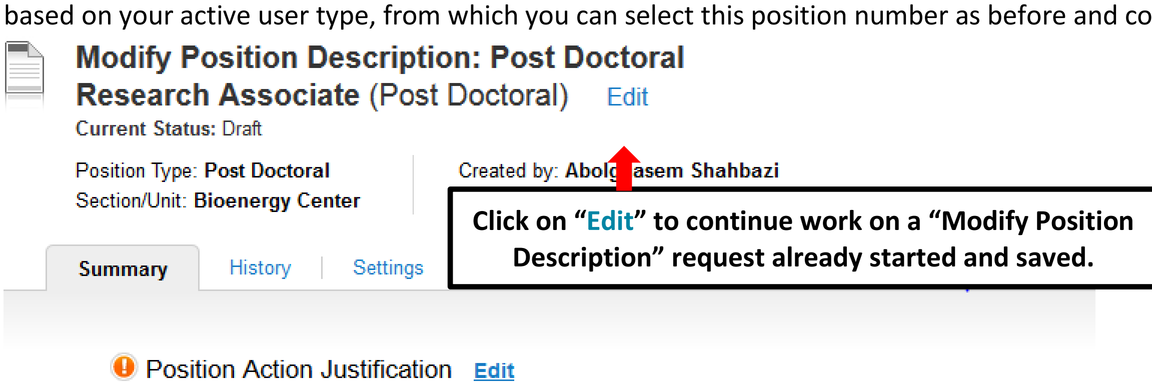


4) Add any Comments into the window that opens (illustrated below) as notes to yourself, if desired
5) Click "Submit"



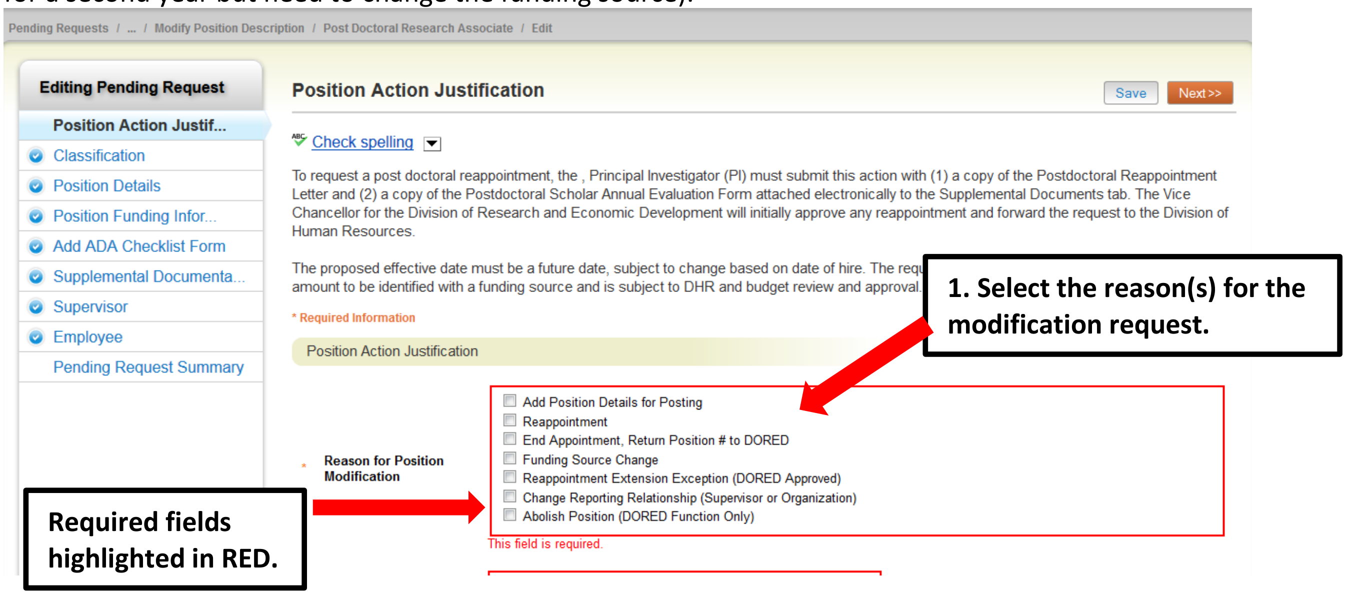
The **Pending Request** on this position description numbers can be located when you log into the Position Description module again as the same **User Type** you used to begin the action. Hover your cursor over the **Position Descriptions tab** and click on "**SHRA Pending Requests**."

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.



Post Doctoral Modify - Position Action Justification Tab

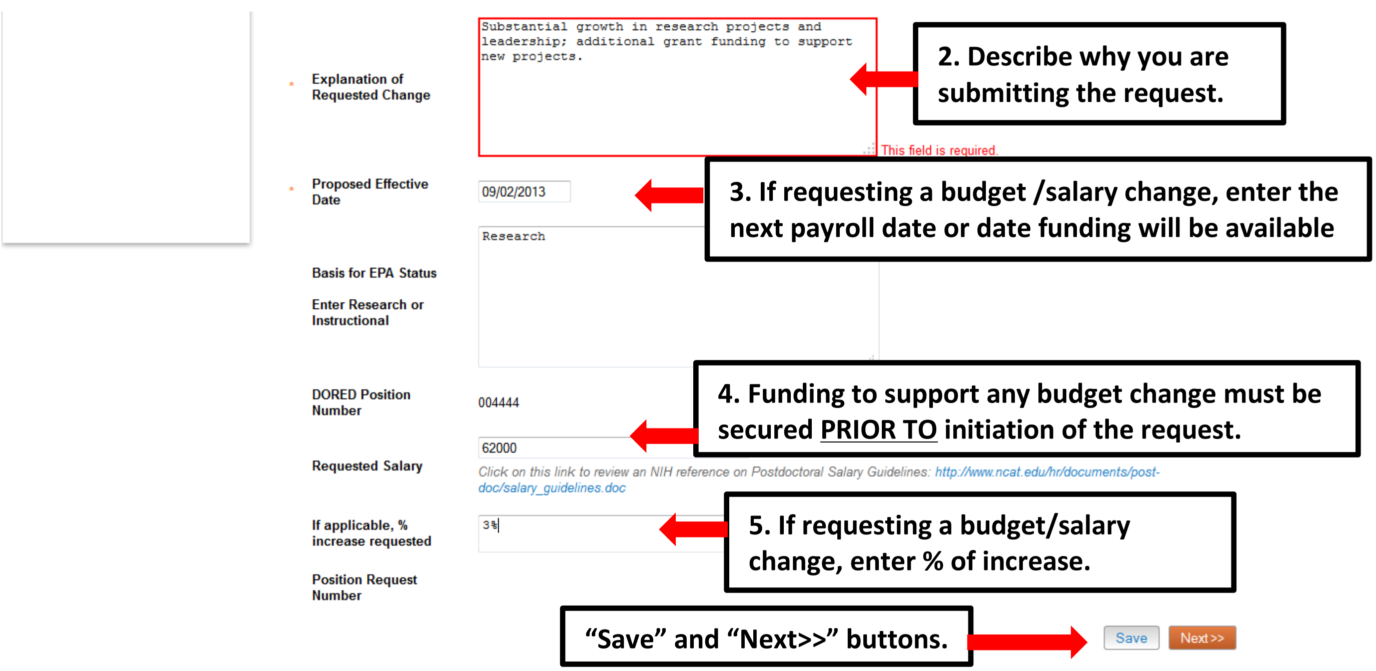
The "**Modify Position**" action in PeopleAdmin 7 allows for a variety of actions to be requested and completed. In the Post Doctoral classifications, "modify position" is used for reappointments, assigning additional duties, funding extensions and funding source changes. At least one option must be 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).



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:



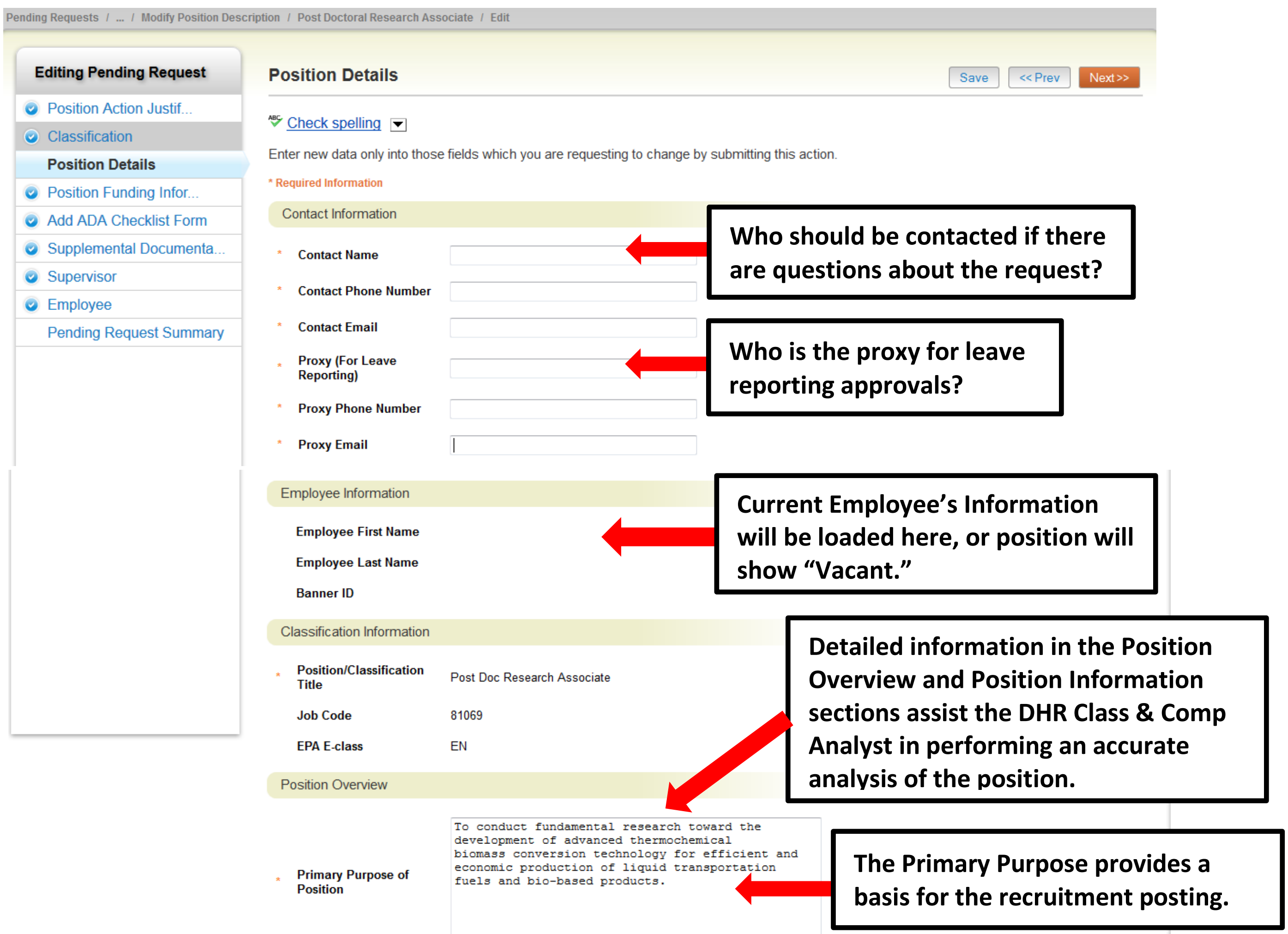
Post Doctoral Modify - Classification Tab

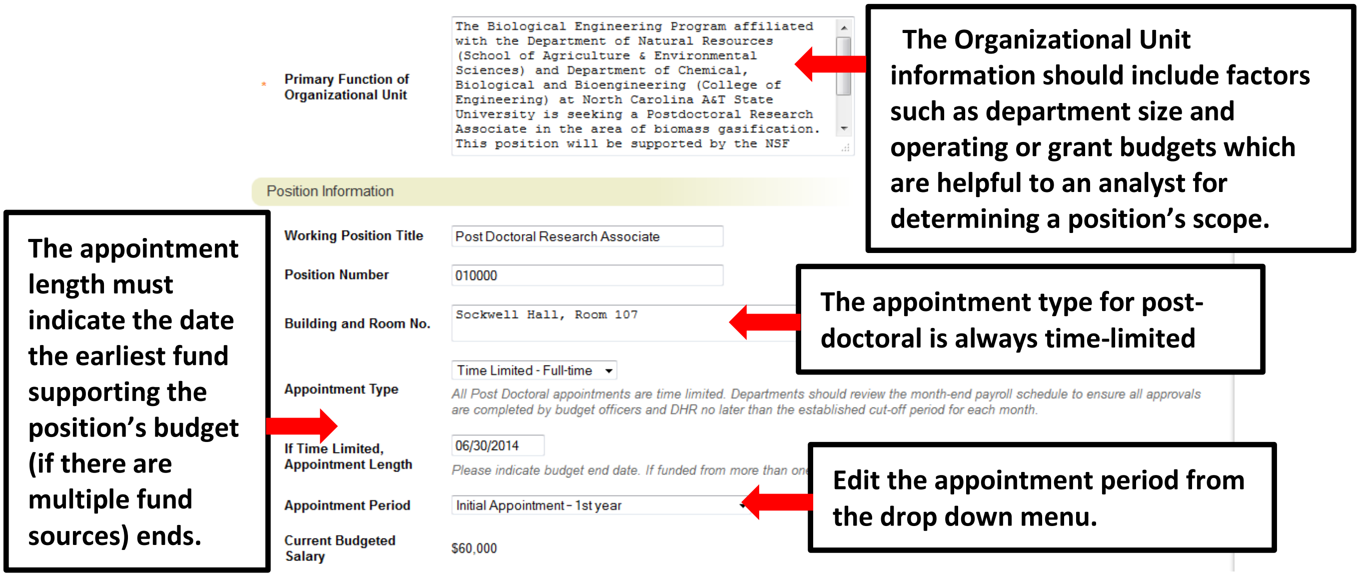
A post doctoral reappointment does not change the position title/classification. To continue, click on **Next>>** at top right.

Post Doctoral Modify - Position Details Tab

Please note that the *first* 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 *need to be revised* 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:





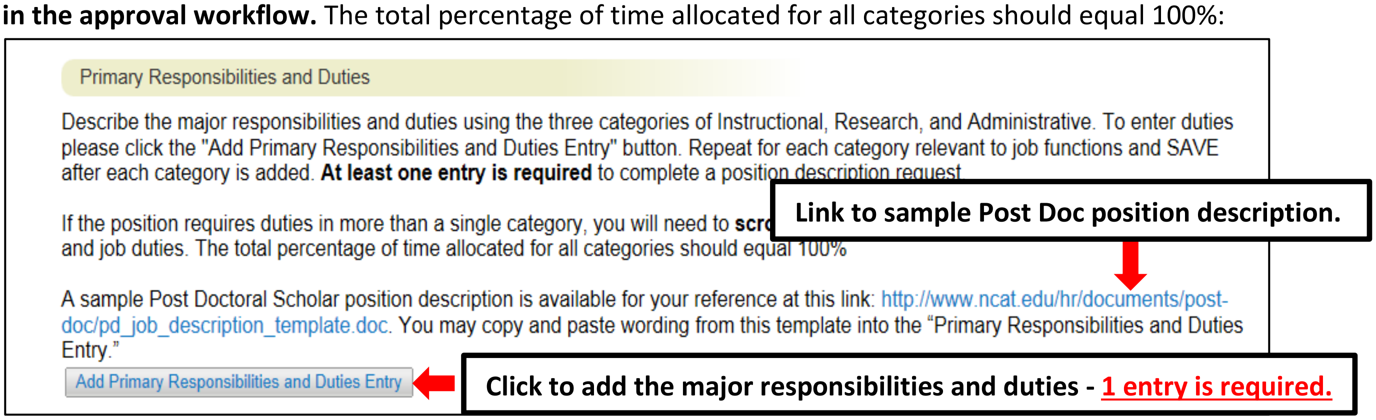
Post Doctoral Modify – Position Details Tab – Primary Responsibilities

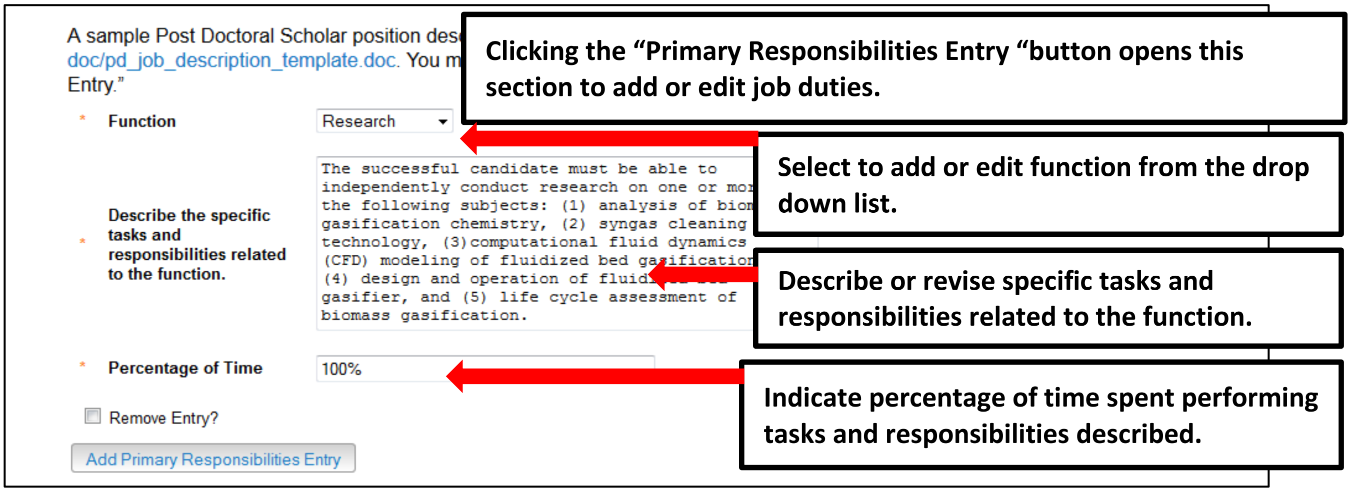
The next section of the Position Details tab is used to build **current duties and responsibilities** into the position. It is the *most important section* of a position description request, but easily missed by first-time users. Please read and follow all instructions in this area to ensure that your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

On 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 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.

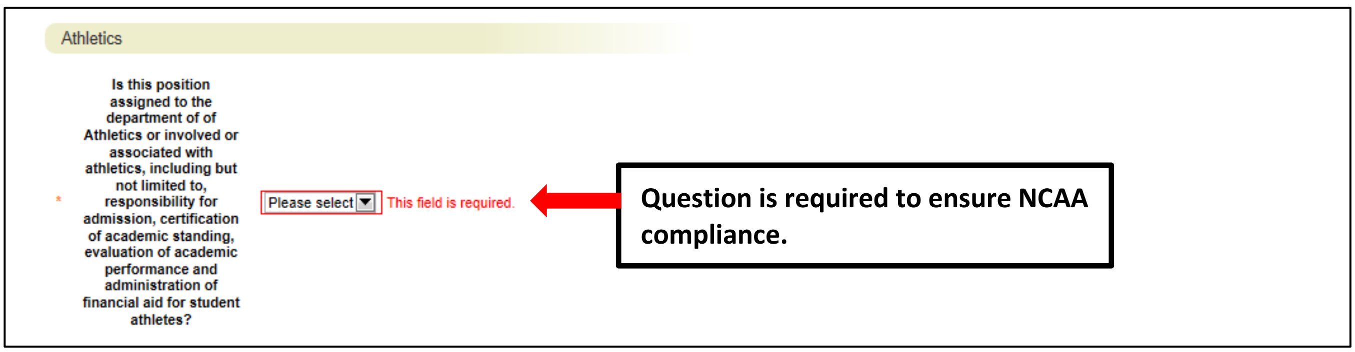
Please Note: Each time the "Add Entry" button is clicked; you are taken back to the top of the Position Details Tab and will need to ***scroll down*** through the other sections again to see then location to add the new entry.
IMPORTANT: **Completion of at least one entry is required in order to move this request to the next step in the approval workflow.** The total percentage of time allocated for all categories should equal 100%:

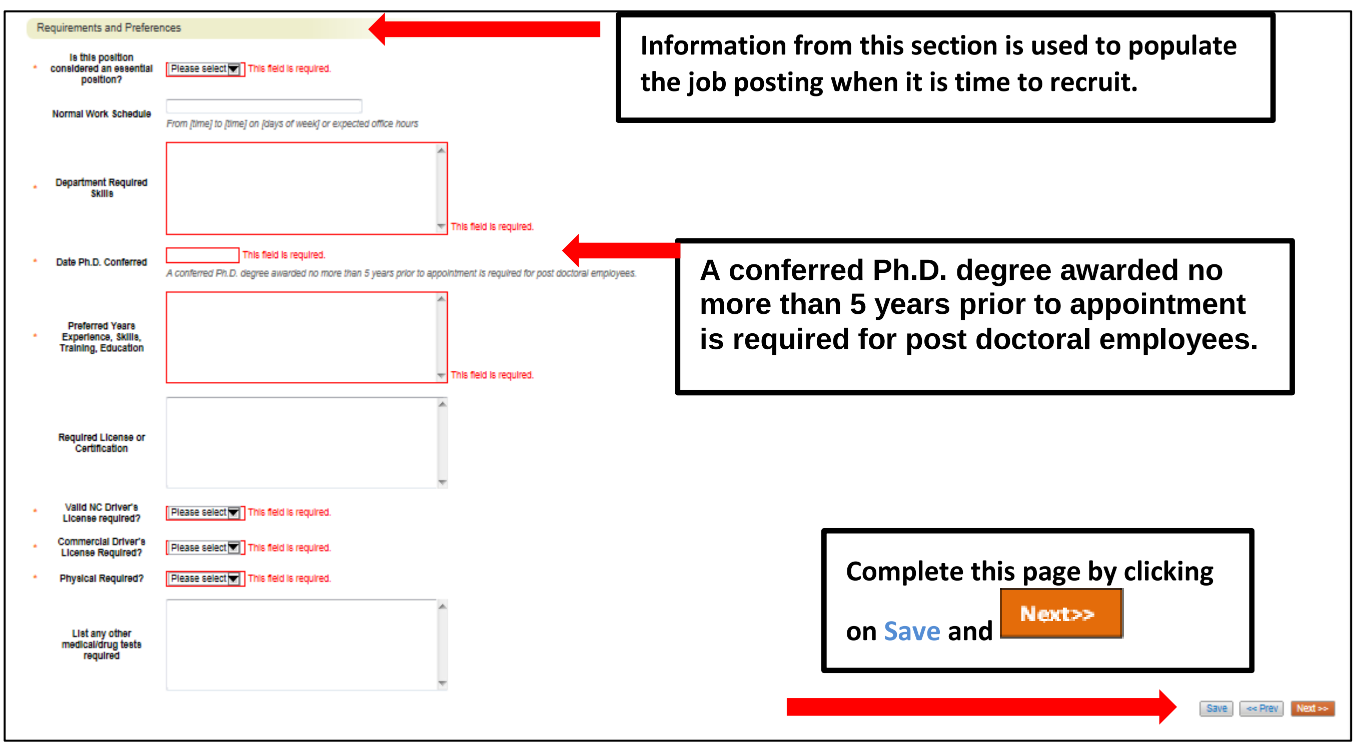




Post Doctoral Modify – Position Details – Compliance and Requirements

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

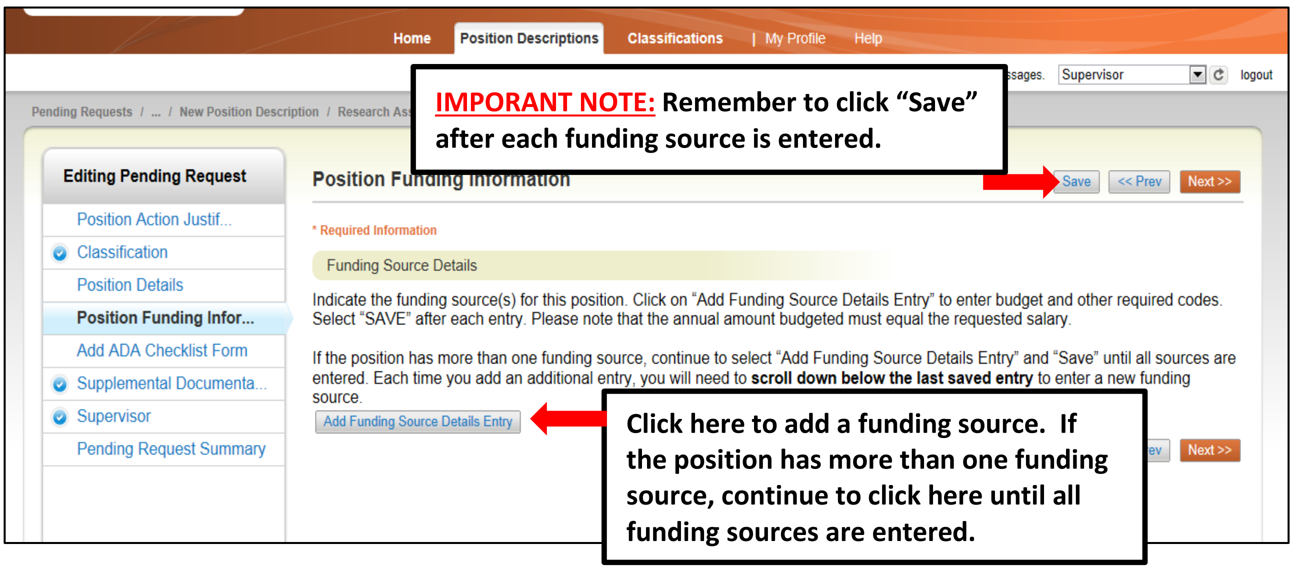
In the Funding Source Details section of this tab, you will indicate the funding source(s) for this position. Click on the **Add Funding Source Details Entry** button to enter budget and other required codes. **Select "Save" after each entry. PLEASE NOTE:** The annual amount budgeted must equal the requested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

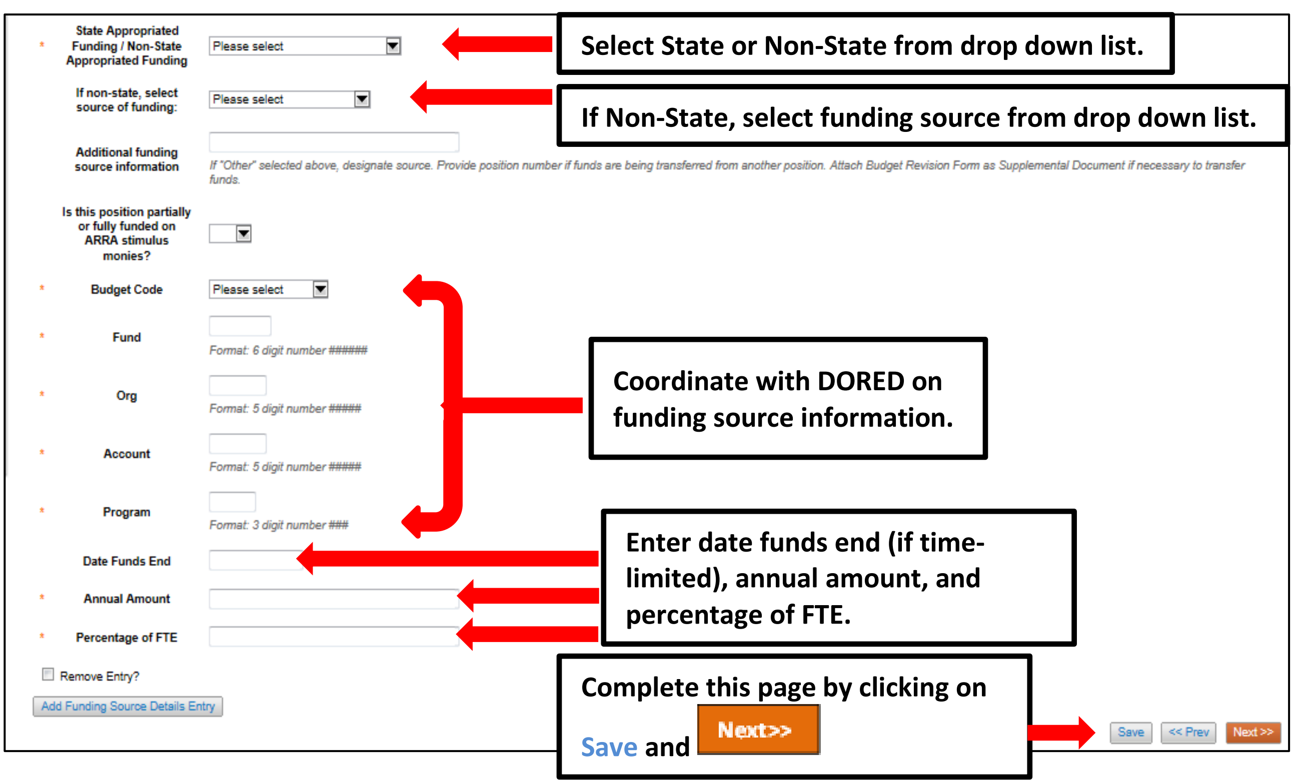
If you are unsure of what fund to use, the most up to date information may be found in **Banner Finance** on these forms:

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 listingsof 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:



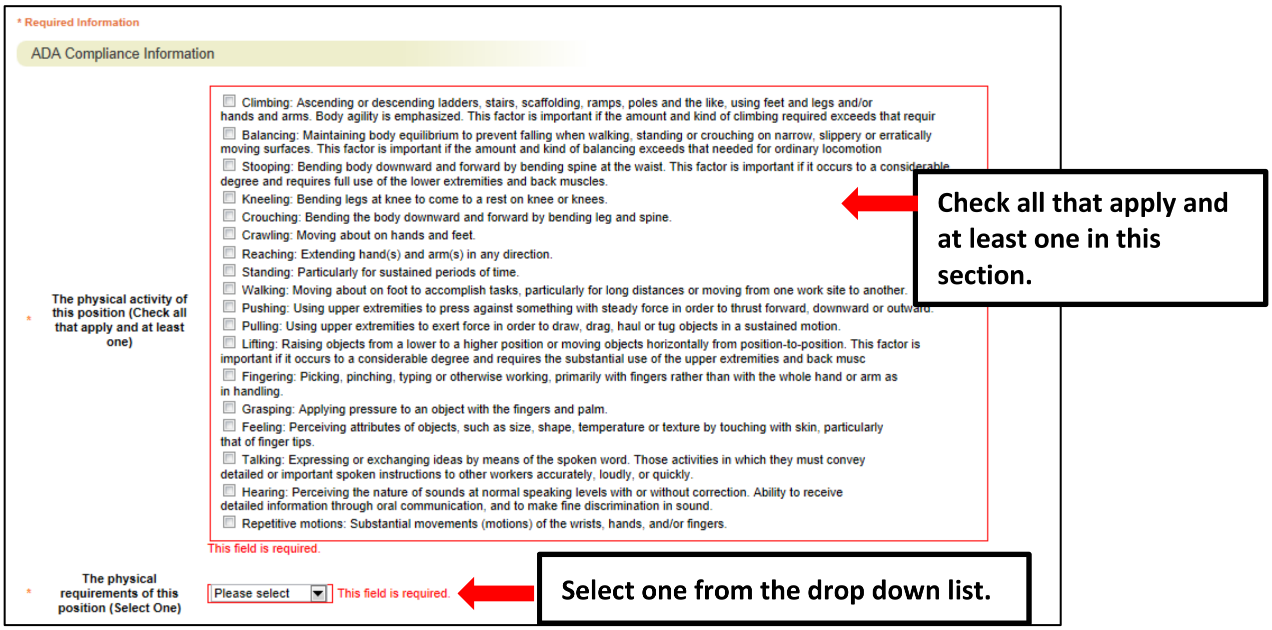


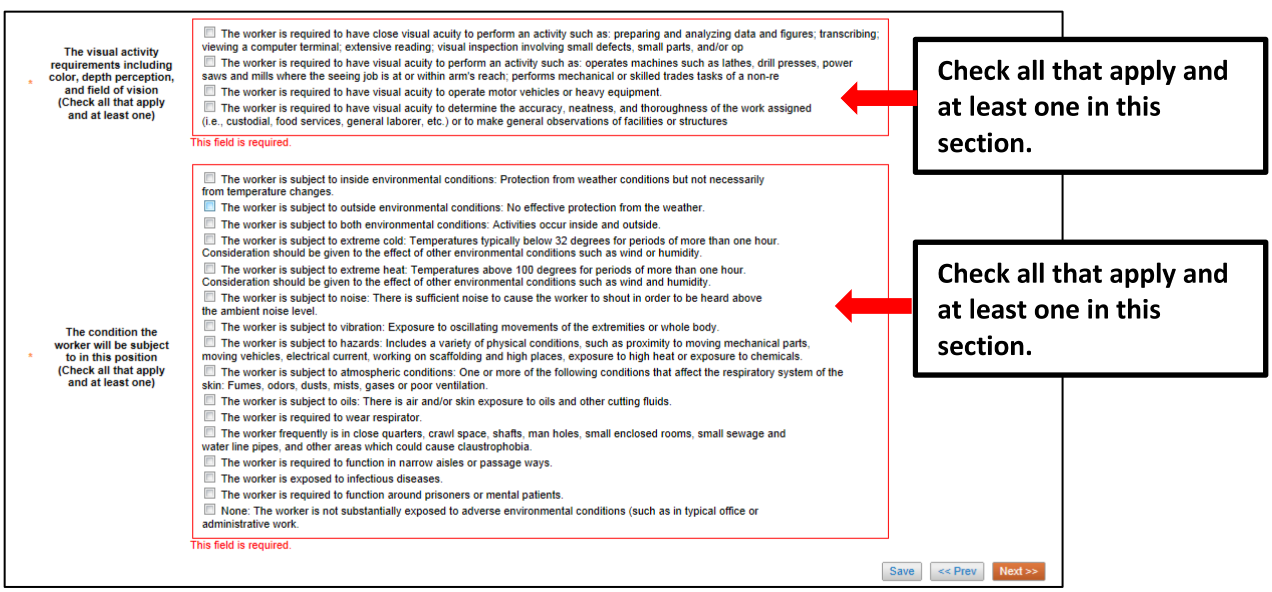
Post Doctoral Modify - Add ADA Checklist Form Tab

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

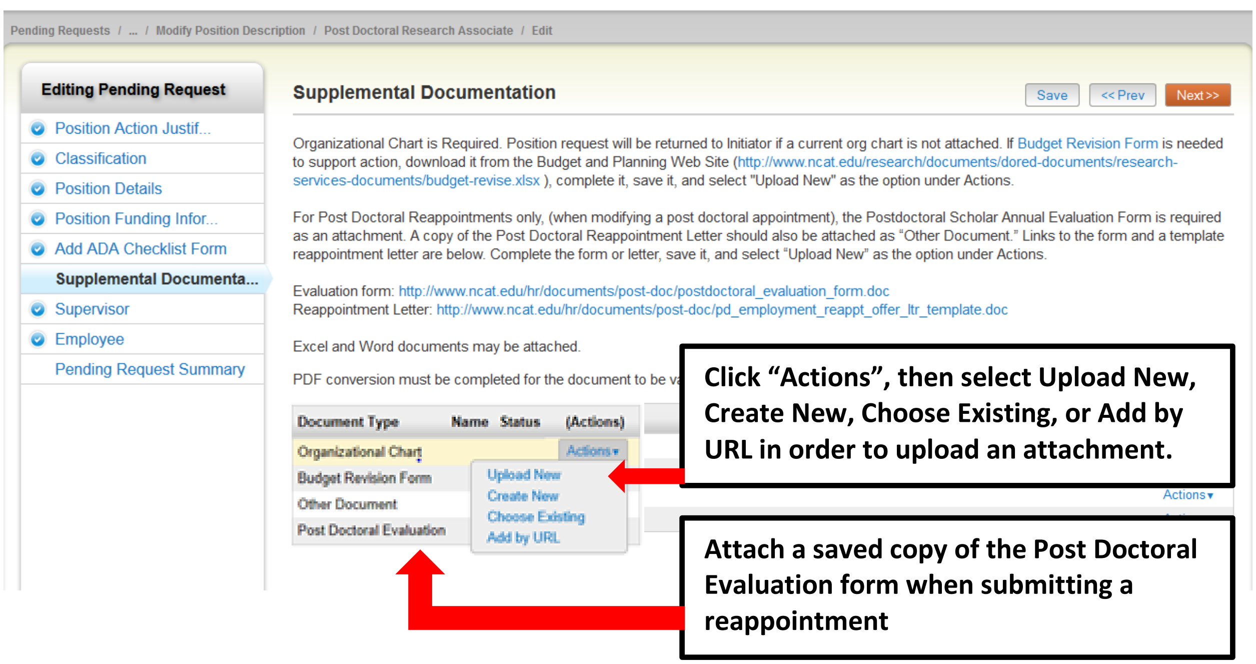
The **Supplemental Documentation Tab** allows you to upload documents as attachments that will route with the request through the approval workflow. Attachments can be uploaded as follows:

- **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: http://www.ncat.edu/hr/documents/post-doc/postdoctoral_evaluation_form.doc
Reappointment Letter: http://www.ncat.edu/hr/documents/post-doc/pd_employment_reappt_offer_ltr_template.doc

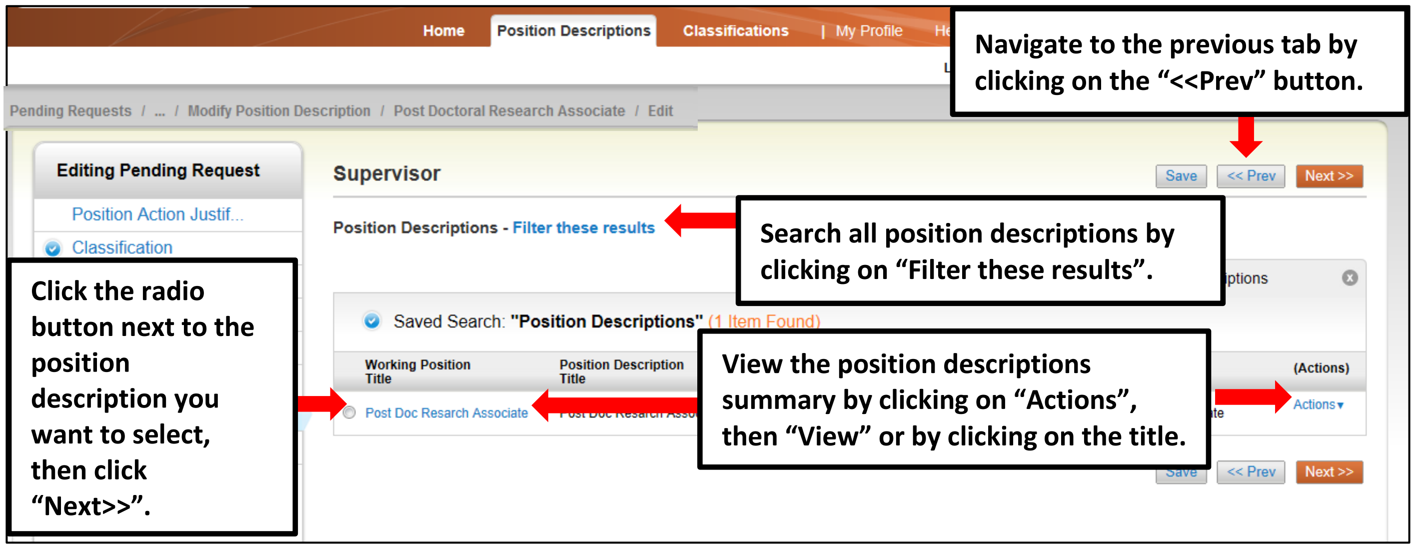


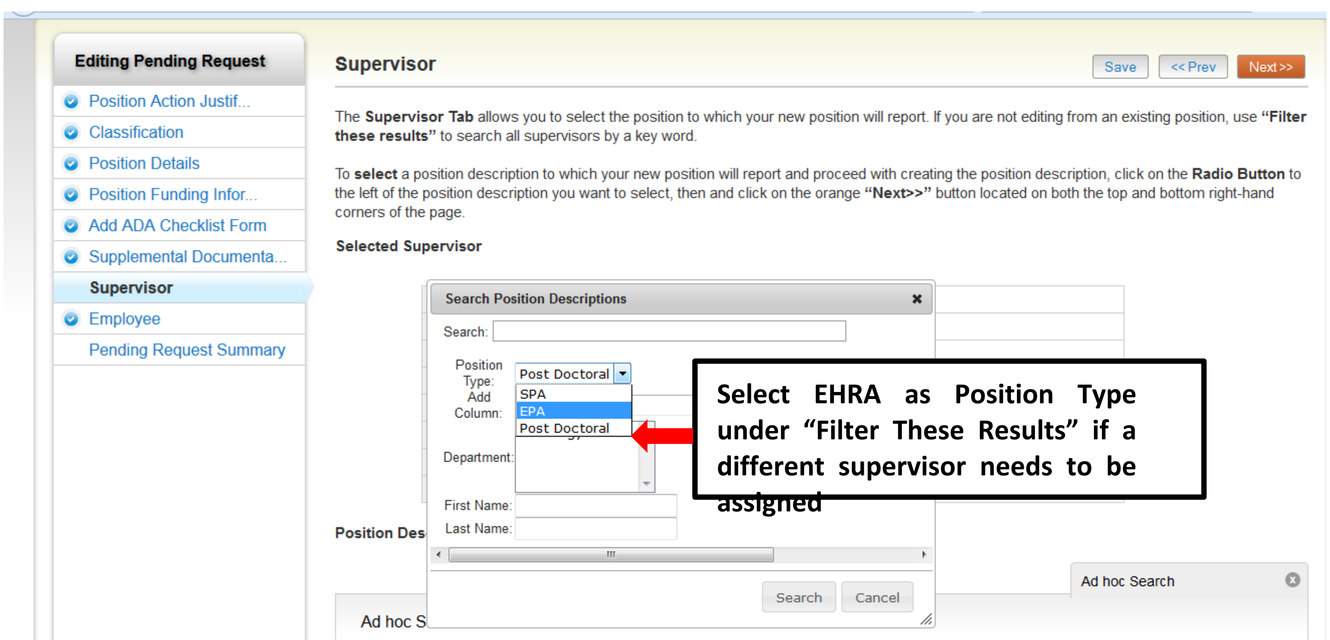
Post Doctoral Modify - Supervisor Tab

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.

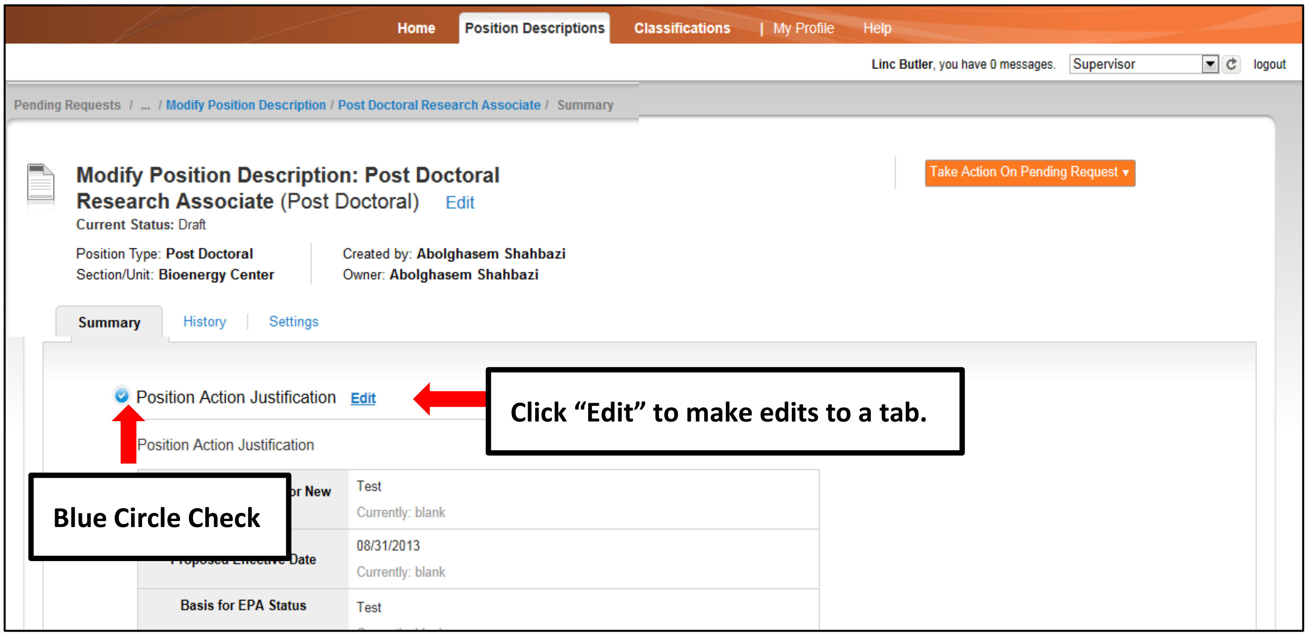
REMEMBER: The positions that appear in this list are based on your active user type and the org unit to which you are assigned. (Supervisor, Department Head, Dean / Vice Chancellor):



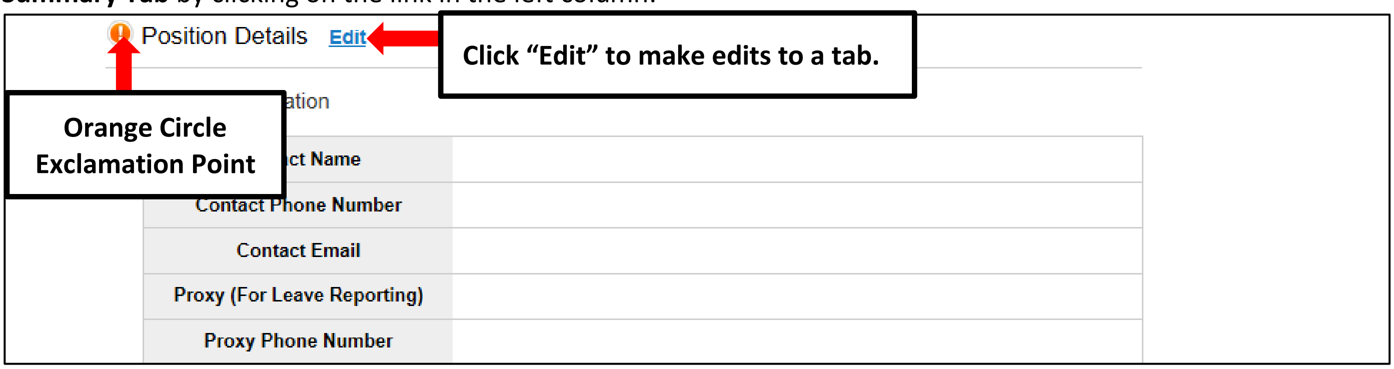


Post Doctoral Modify - Pending Request Summary Tab

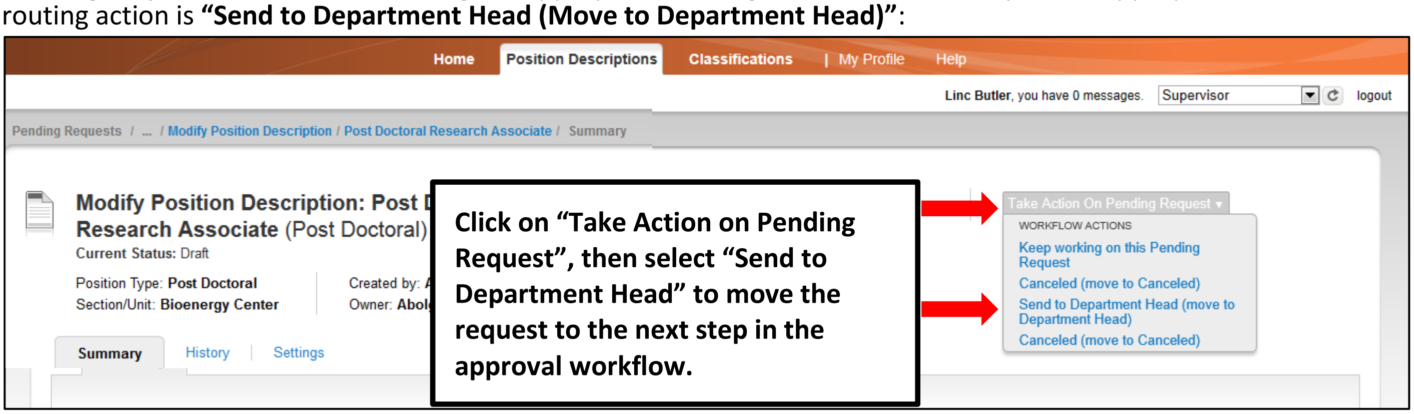
The **Pending Request Summary Tab** allows you to perform a final review all of the position information you've entered on the previous tabs prior to sending the request to the next step in the approval workflow. The **Blue Circle Check** appears by those tabs for which all required information has been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



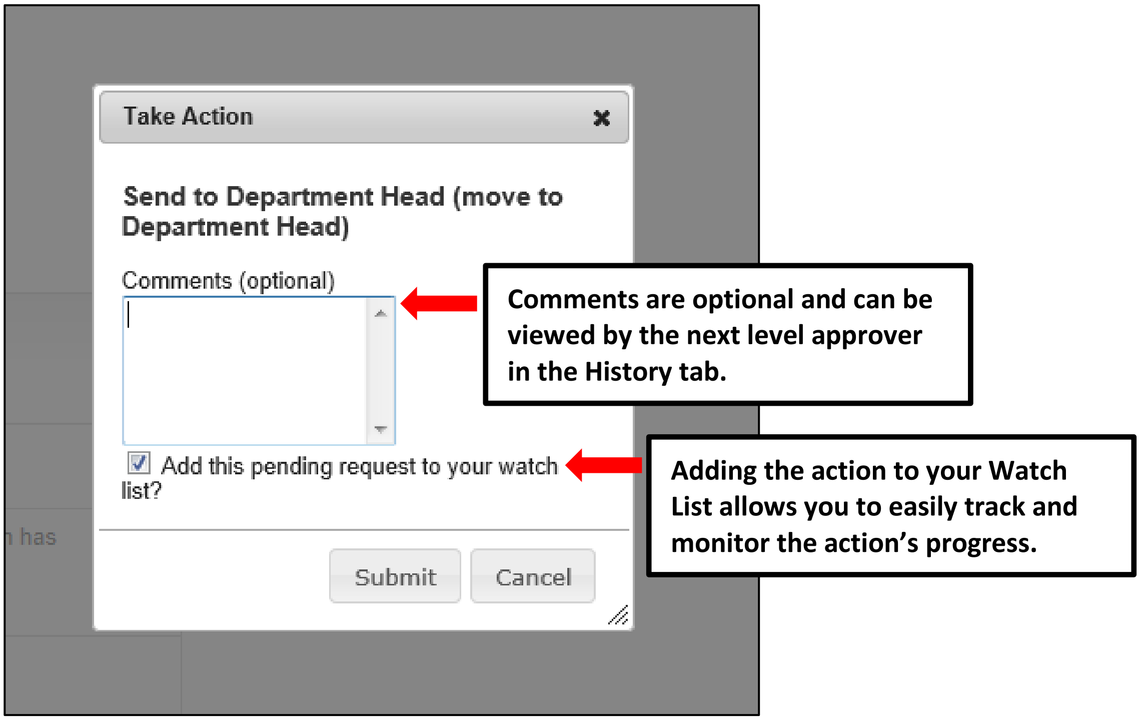
An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save",** and then return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



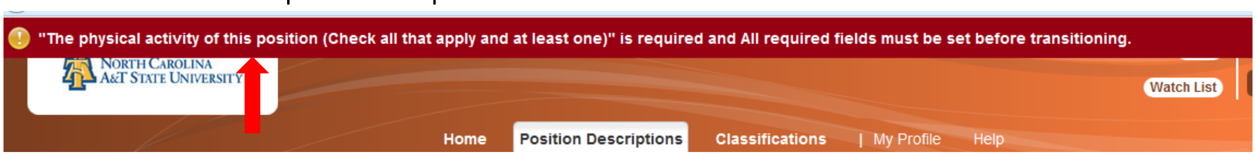
Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example,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



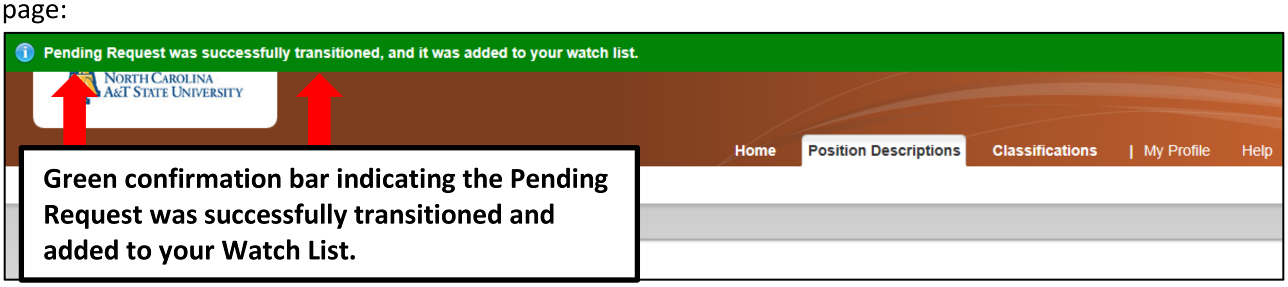
You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable in the History tab by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When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



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).

Section 3: Applicant Tracking

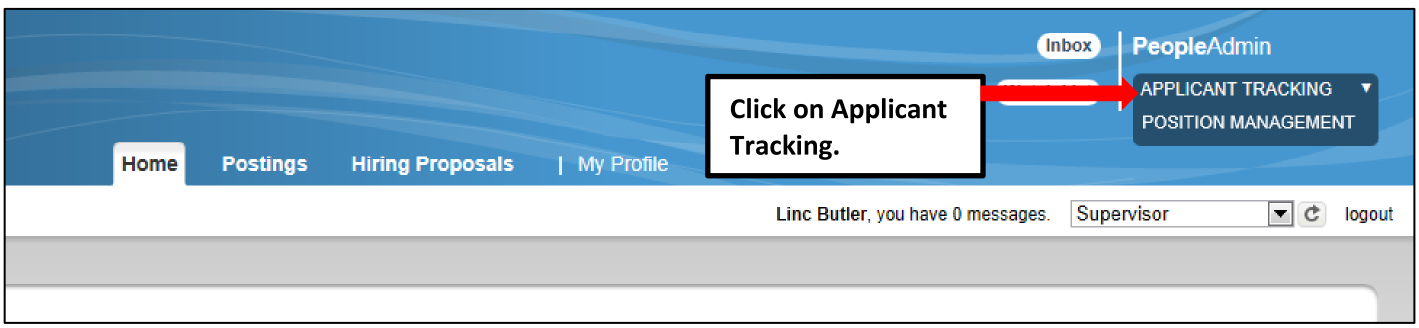
The Applicant Tracking module provides online access to job postings and applicant information, and allows for managers and supervisors to initiate requests to post permanent SHRA, EHRA, and Post Doc positions for recruitment and initiate hiring proposals. The specific requests and actions that can be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

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

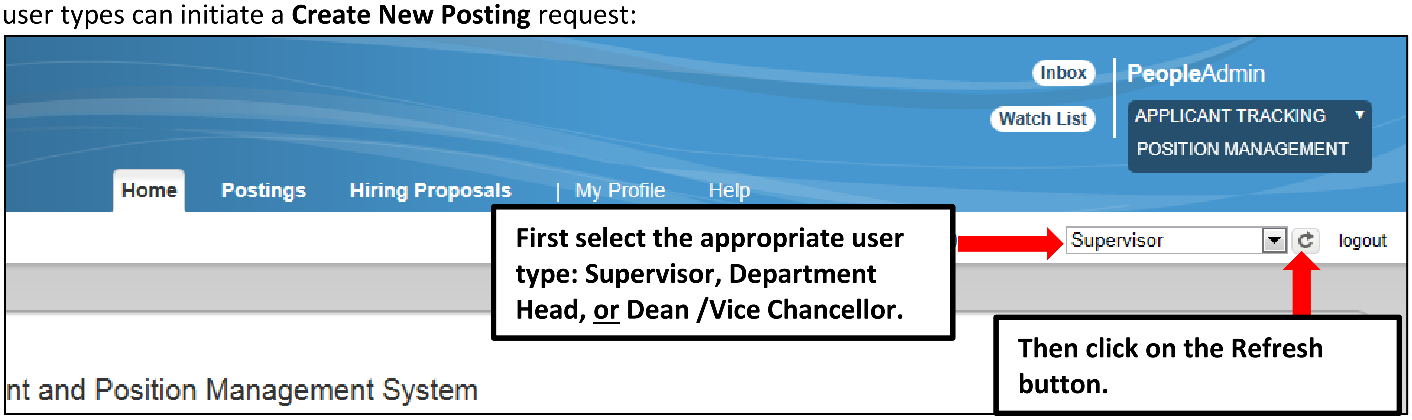
The only user types that can initiate a **Create New Posting** or a **Hiring Proposal** request are Supervisor, Department Head, and Dean/Vice Chancellor. The only user types that can review and rank applicants are Supervisor, Department Head, Dean/Vice Chancellor, Applicant Reviewer, or Search Committee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

Create New Posting – General Navigation

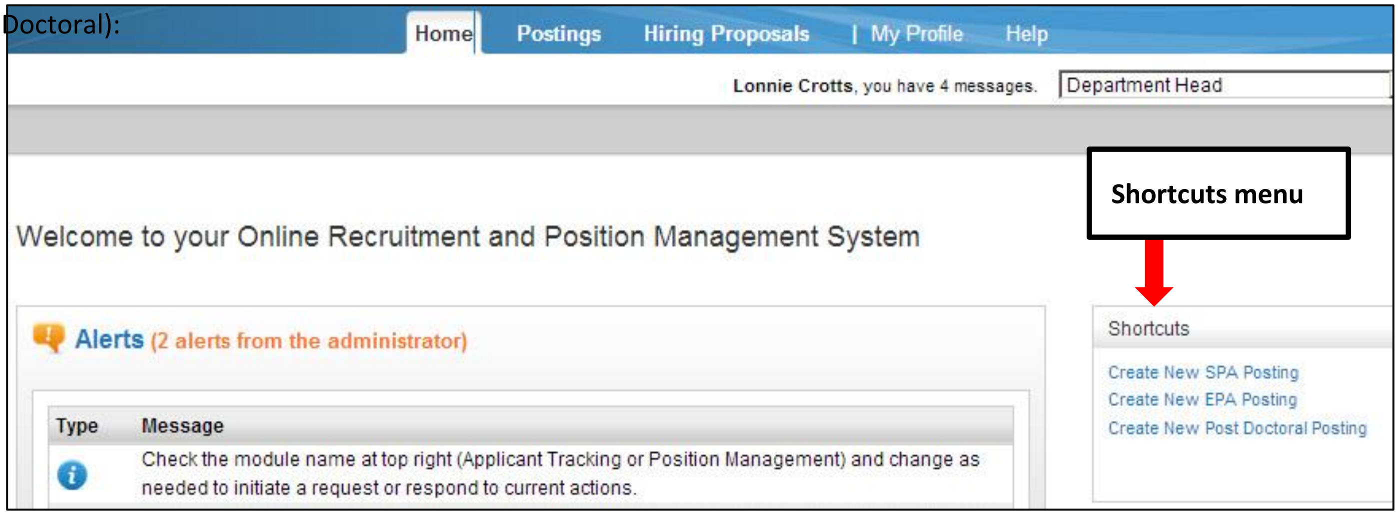
To initiate a **Create New Posting** request, first switch to the **Applicant Tracking** module using the drop down menu located in the top right corner of the page:



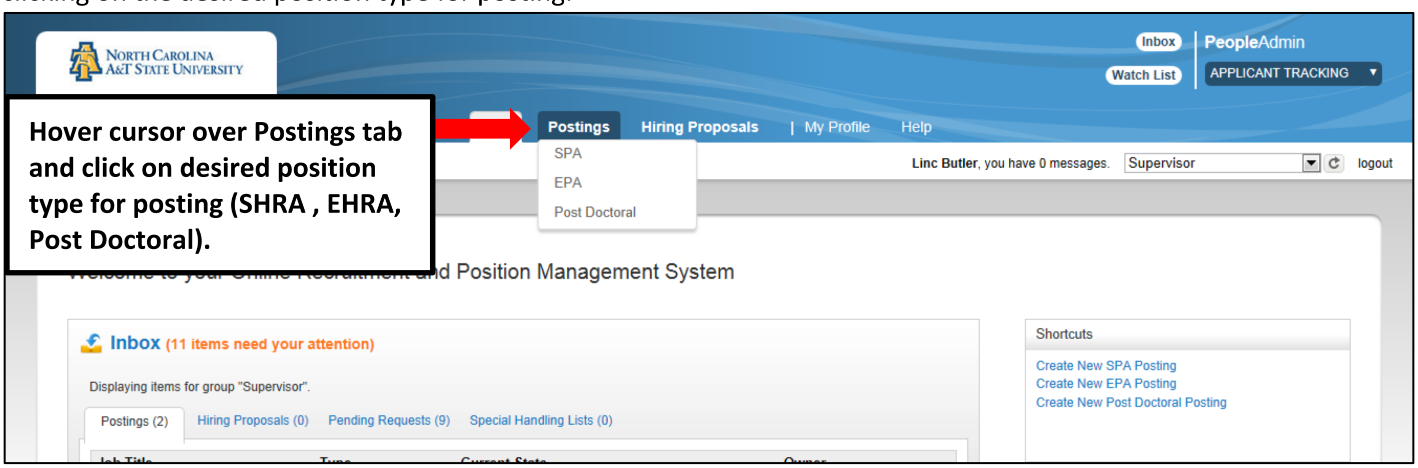
Once in the **Applicant Tracking** module (header at the top of the screen will be **Blue**), make sure you have the necessary active user type. **Remember:** only Supervisor, Department Head, and Dean/Vice Chancellor user types can initiate a **Create New Posting** request:



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-Doctoral):

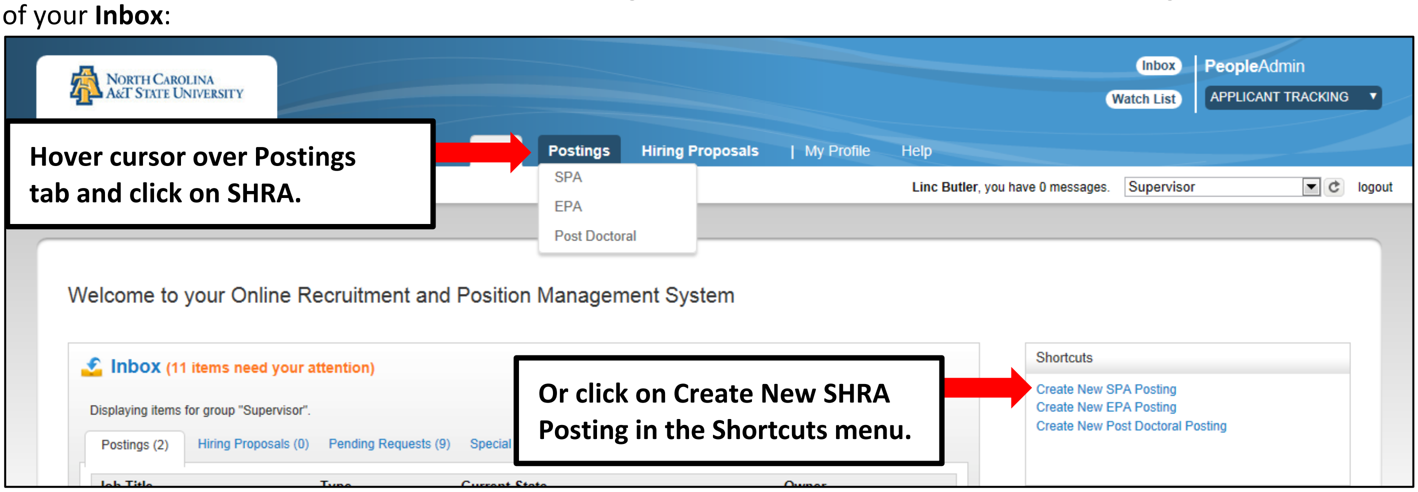


You can also initiate a **Create New Posting** request by hovering your cursor over the **Postings** tab and clicking on the desired position type for posting:



Create New SHRA Posting

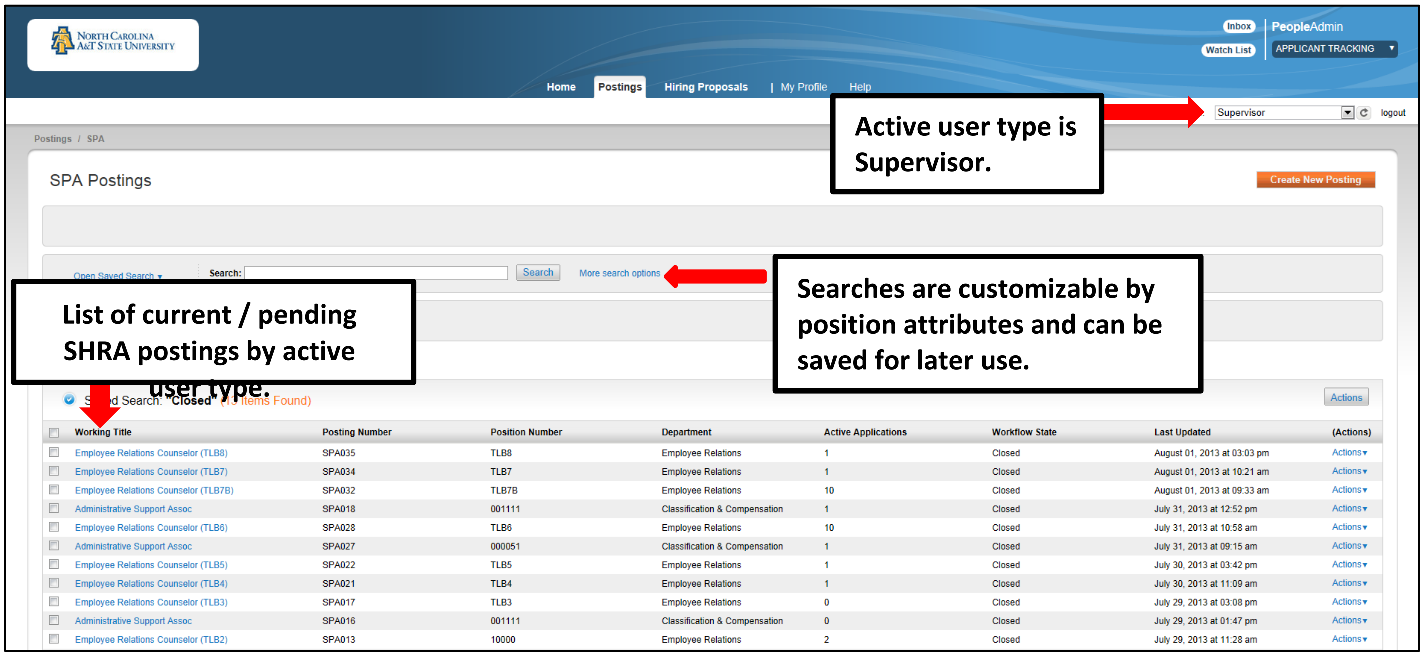
To initiate a **Create New SHRA Posting** request, hover your cursor over the **Postings** tab and click on the "SHRA", or click on the **Create New SHRA Posting** link located in the **Shortcuts** menu to the right of your **Inbox**:



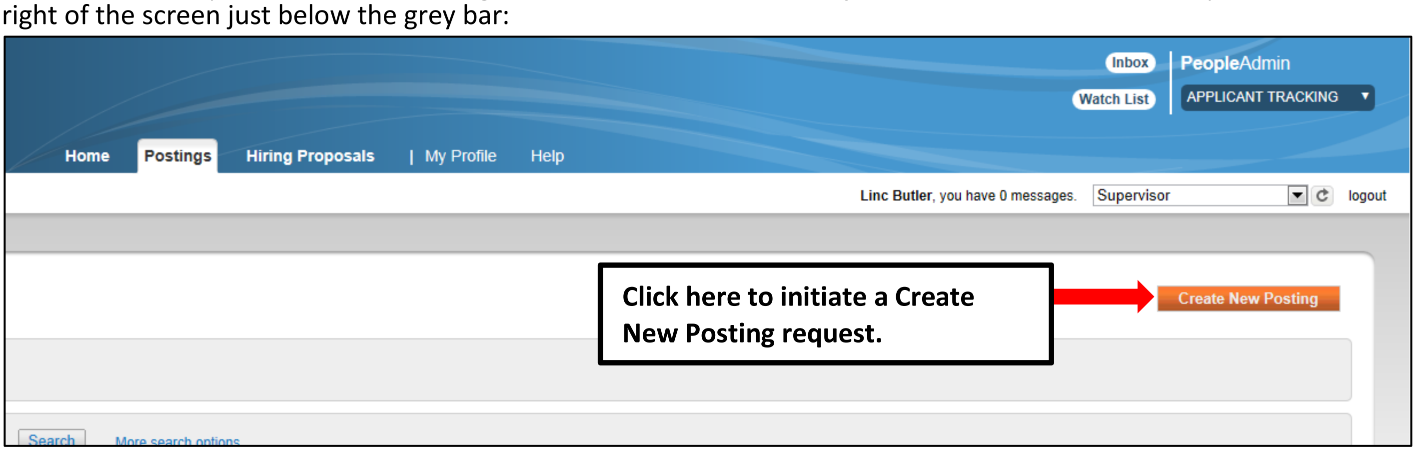
You will then be taken to the **SHRA Postings** view, which provides a list of all current/pending SHRA postings initiated based on your active user type as follows:

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.

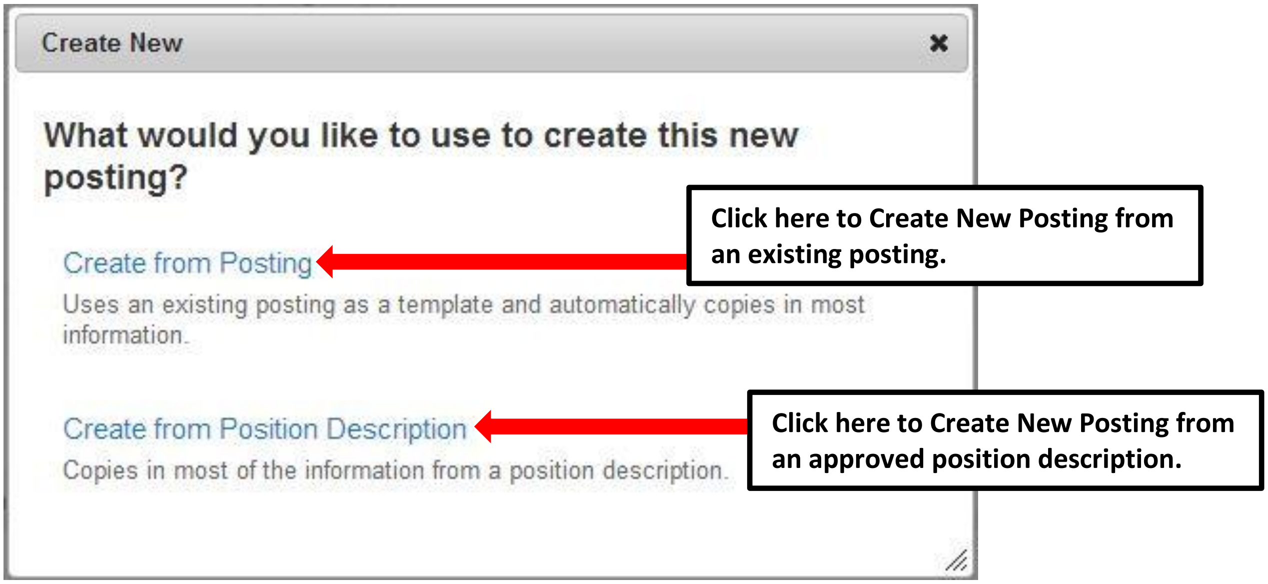
In the **SHRA Postings** view, you can search postings by any number of criteria, including but not limited to position title, posting number, position number, department name, supervisor name, or workflow state. Searches are fully customizable by position and posting attributes, and you can save custom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



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:



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

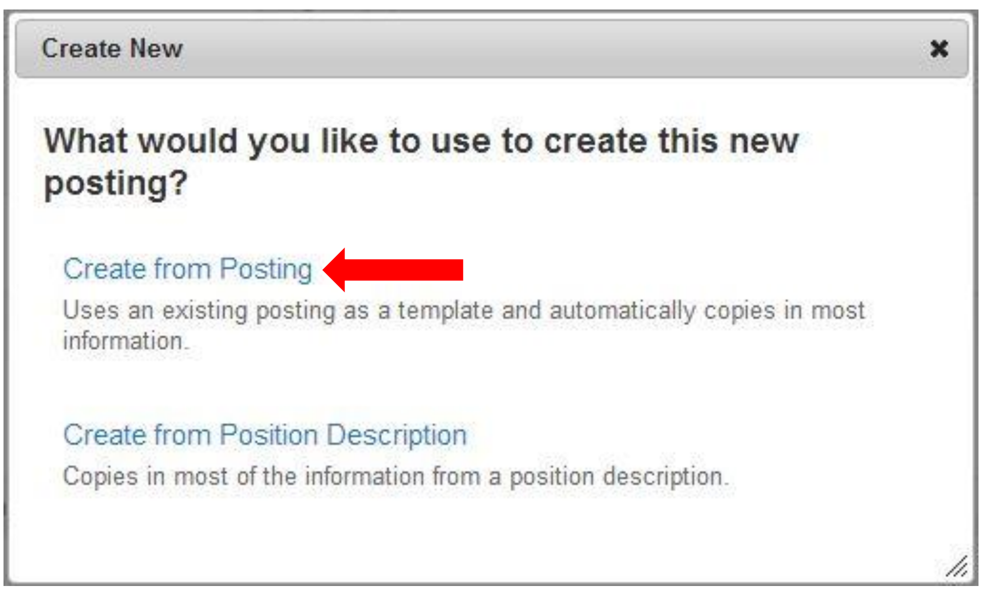


Create New SHRA Posting – Create from Posting

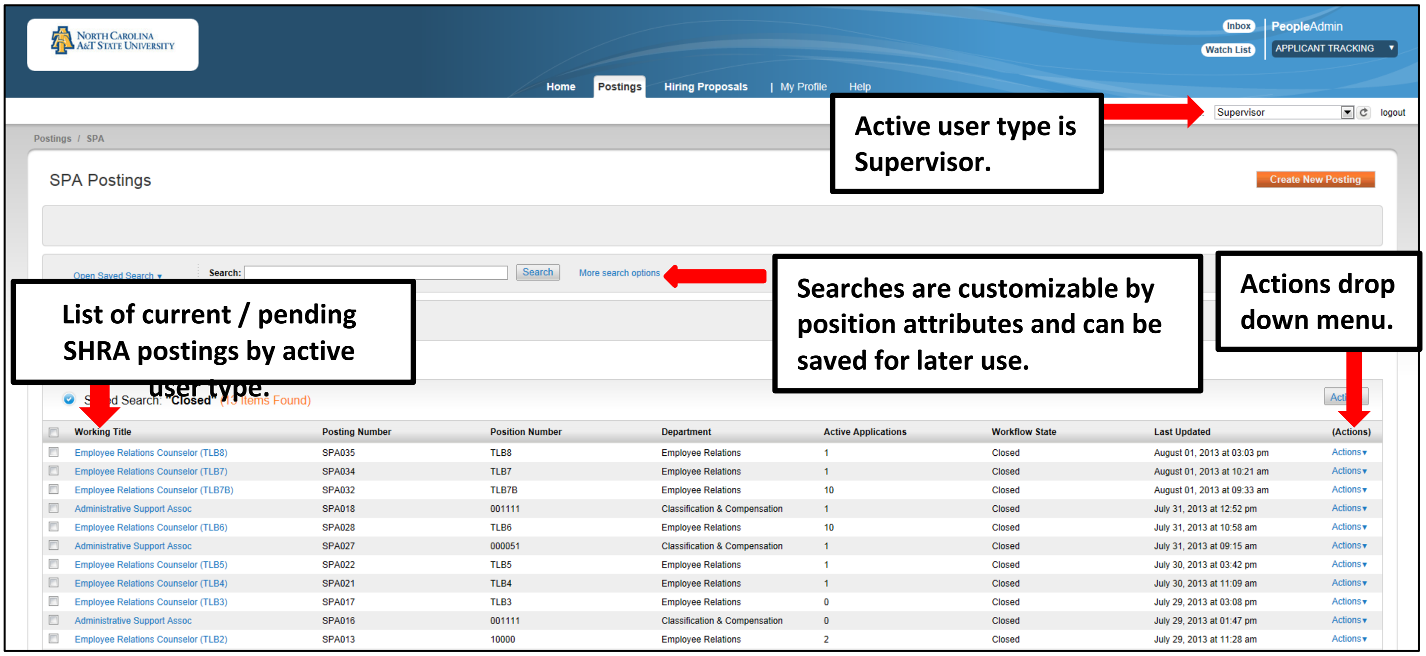
Select **Create from Posting** if you have previously posted a position in the PeopleAdmin system and wish to post a position using the same or similar information from that prior posting.

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.

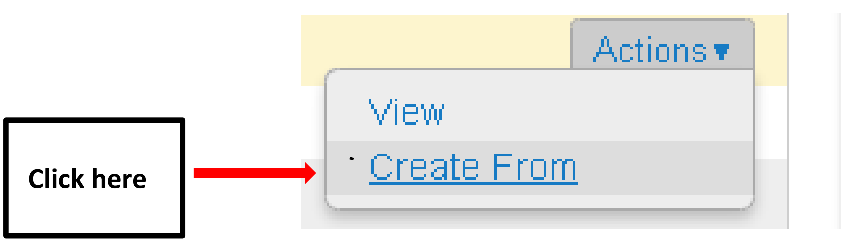
Choosing the **Create from Posting** option copies information from an existing posting into a new posting:



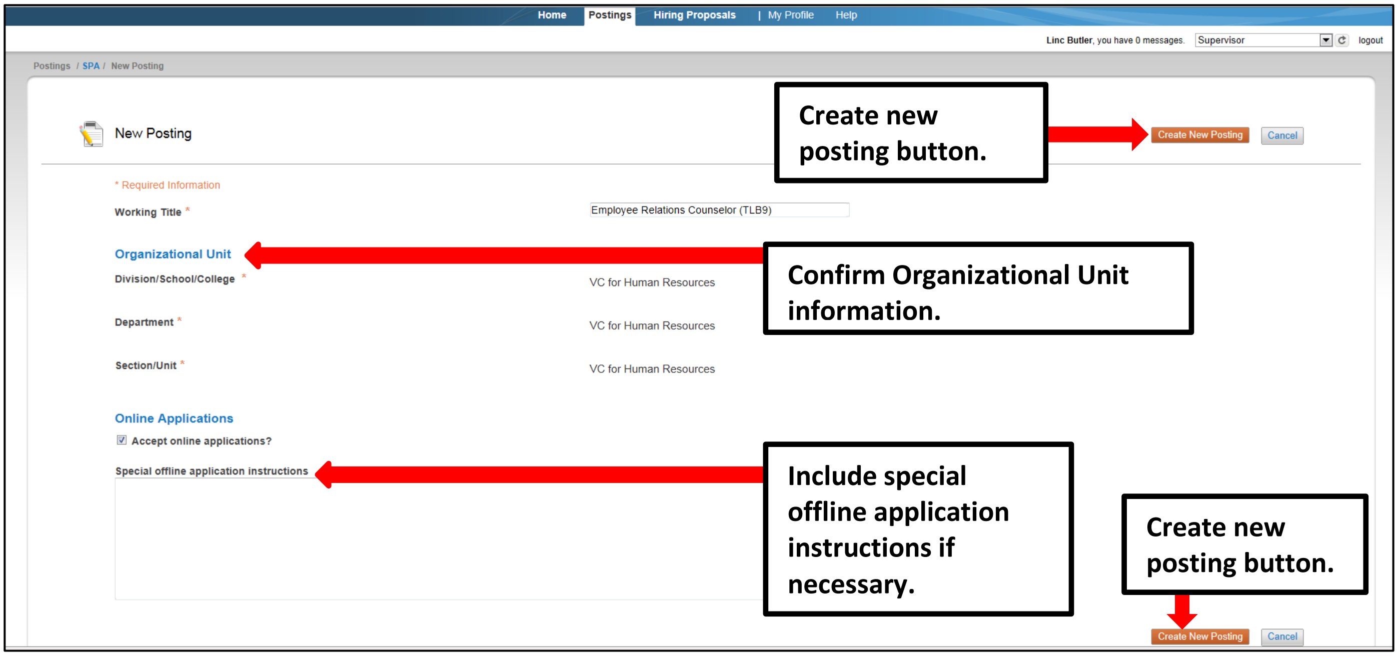
After clicking on **Create from Posting,** you will be taken to the **SHRA Position Descriptions** view, where you can search postings by any number of criteria, including but not limited to position title, posting number, position number, department name, supervisor name, or workflow state. Searches 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:



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:

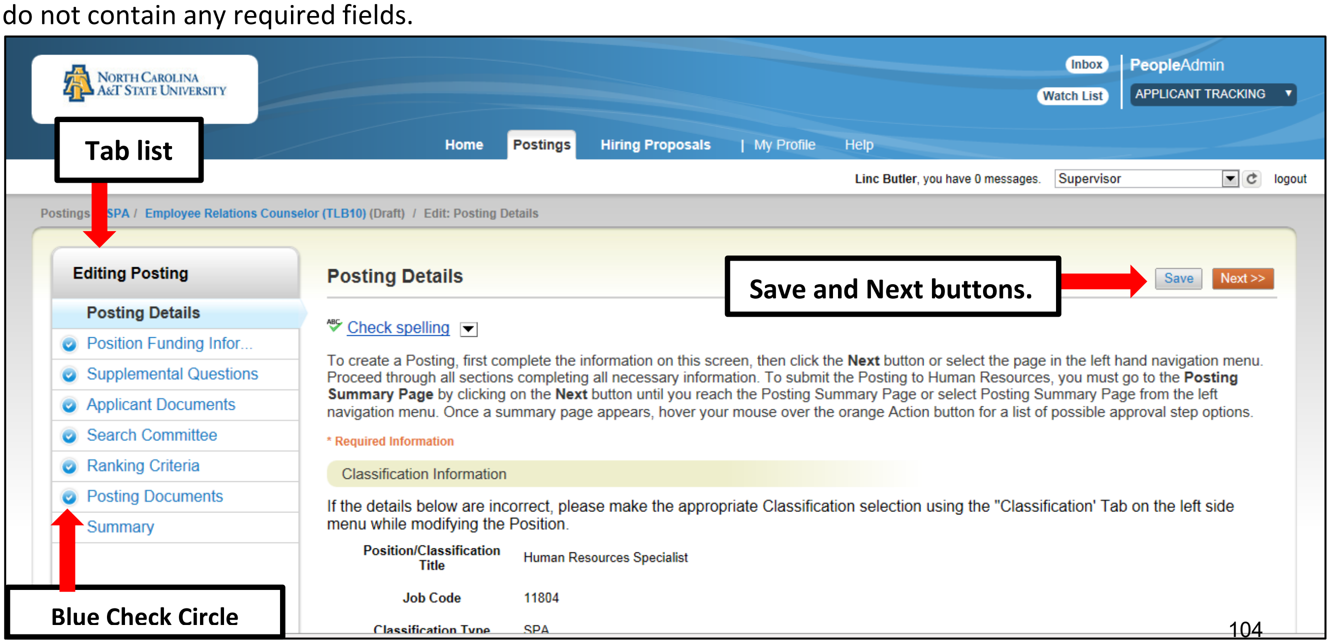


Create New SHRA Posting from an Existing Posting – Create from Posting

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 all other tabs will appear as blue links.

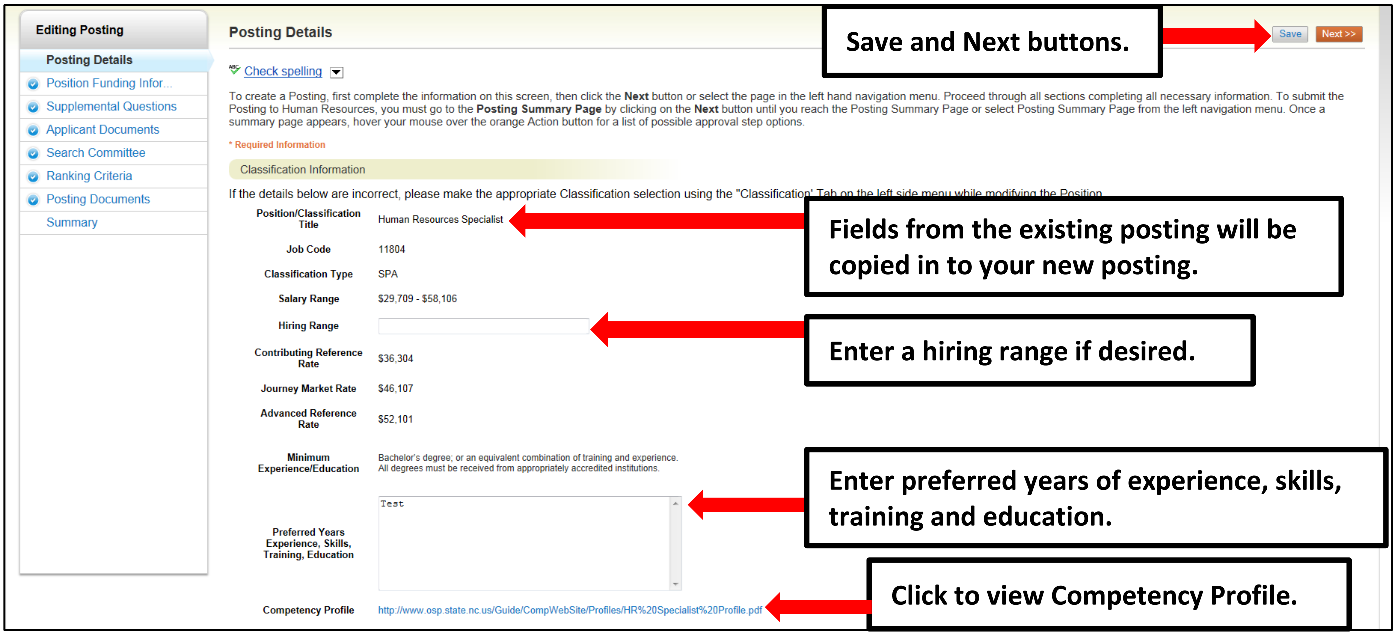
You can save the changes you've made to the active tab you're working on and navigate to the next tab in the list simultaneously by clicking the Next>> button located in both the top and bottom right corners of the page. You can save the active tab you're working on and stay on the same tab by clicking 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.

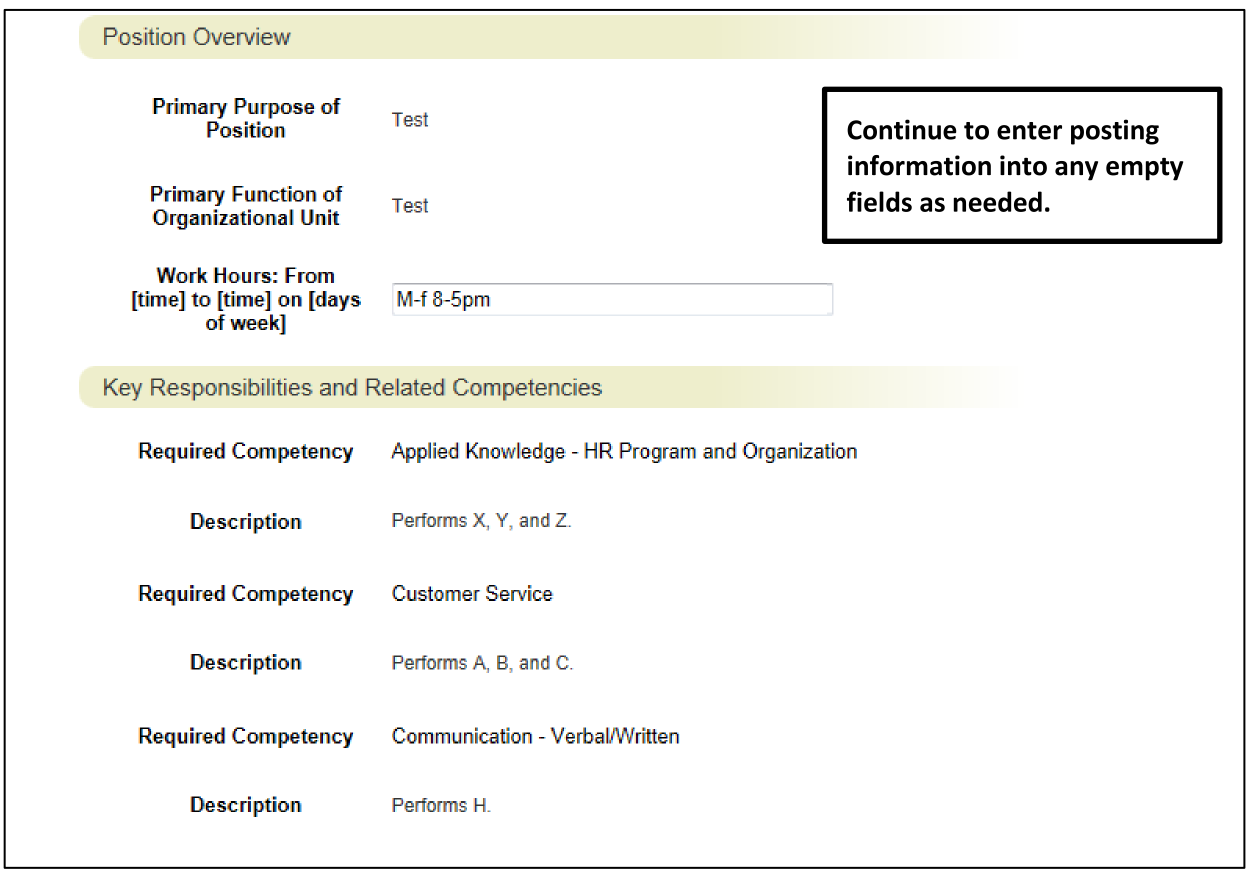
Required fields are highlighted in **red** and must be filled in before the new **SHRA Posting** can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check Circle**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

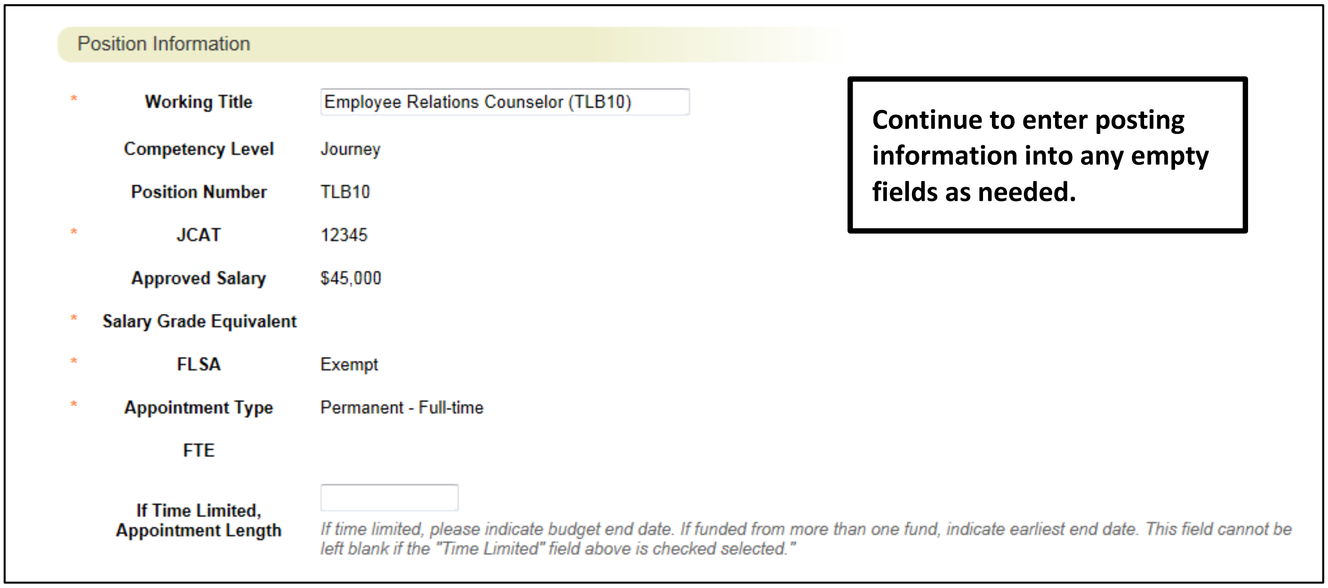


Create New SHRA Posting from an Existing Posting – Posting Details Tab

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:



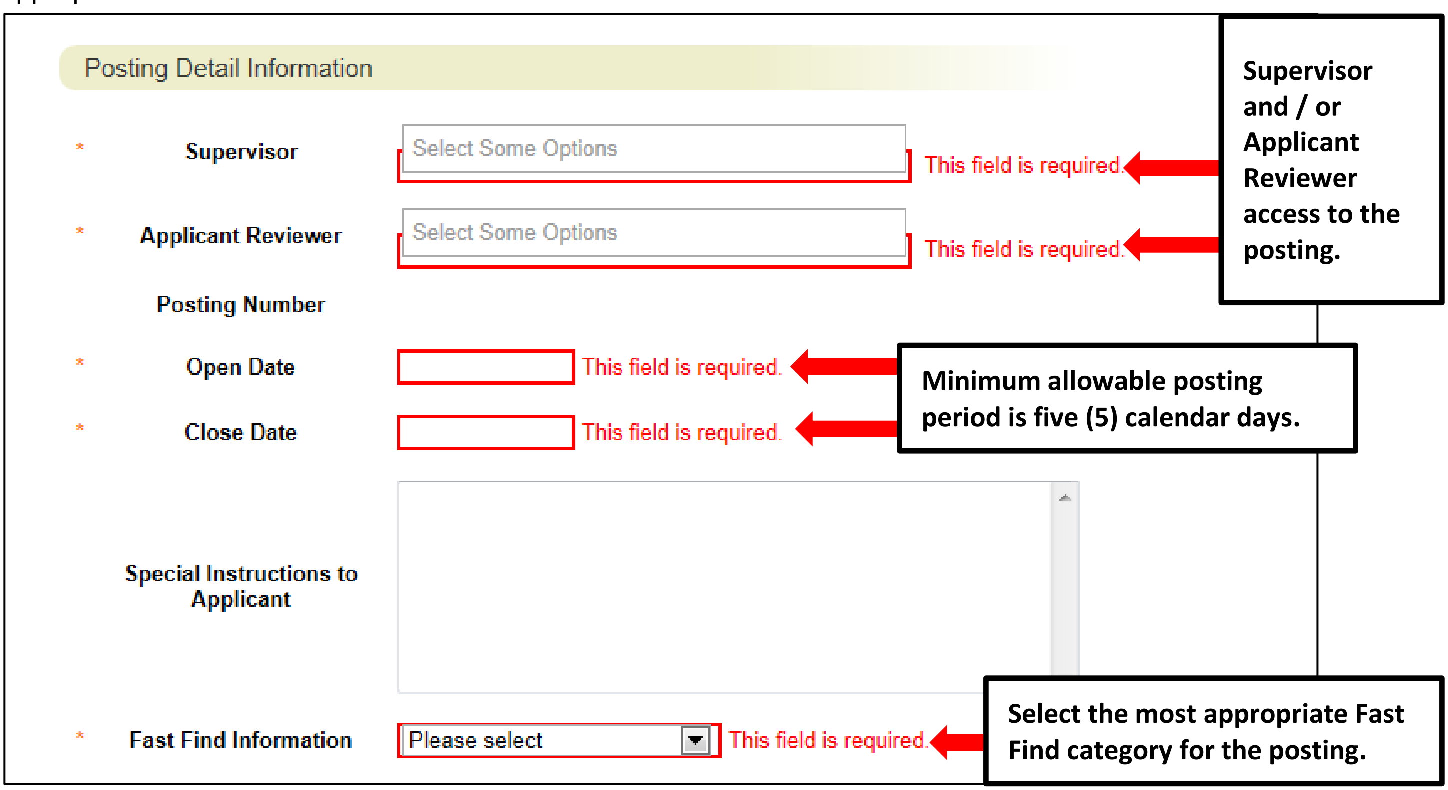



Position Information

* Working Title	Employee Relations Counselor (TLB10)
Competency Level	Journey
Position Number	TLB10
* 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 funded from more than one fund, indicate earliest end date. This field cannot be left blank if the "Time Limited" field above is checked selected."*

Continue to enter posting information into any empty fields as needed.

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

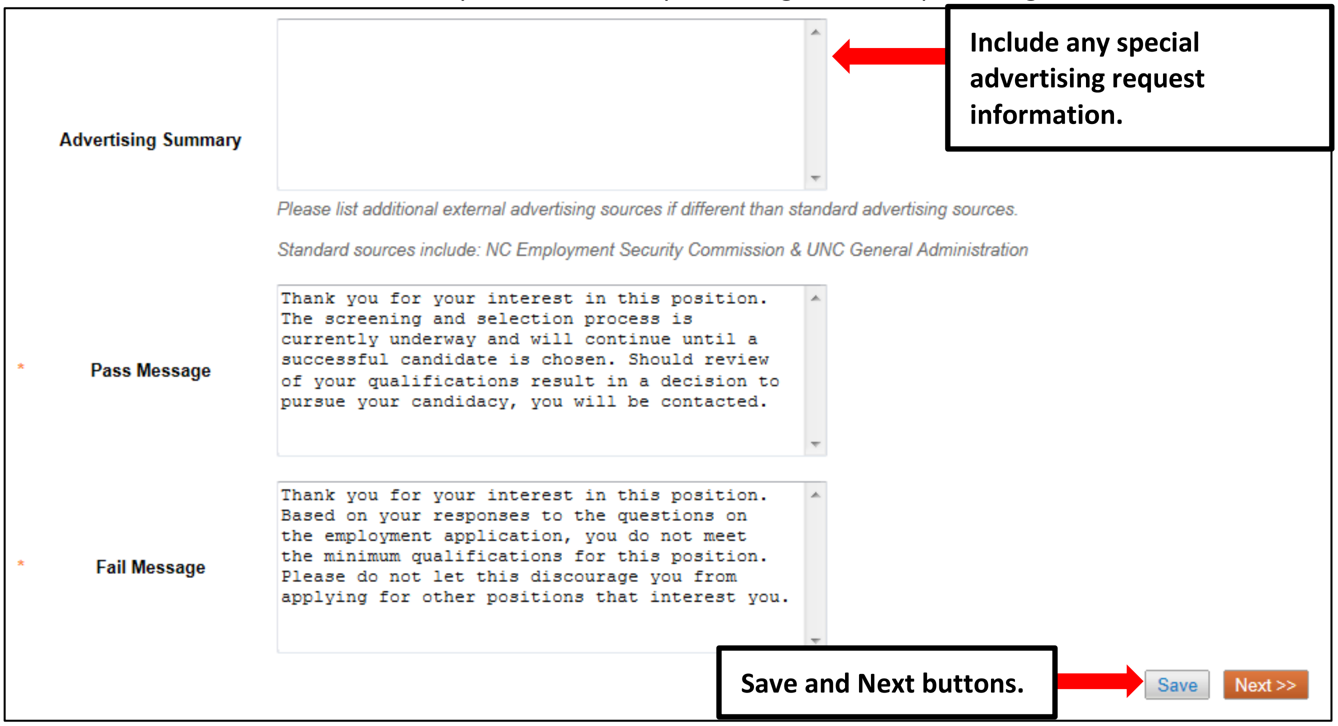
* Supervisor	Select Some Options — This field is required.
* Applicant Reviewer	Select Some Options — This field is required.
Posting Number	
* Open Date	This field is required.
* Close Date	This field is required.
Special Instructions to Applicant	
* Fast Find Information	Please select — This field is required.

Supervisor and / or Applicant Reviewer access to the posting.

Minimum allowable posting period is five (5) calendar days.

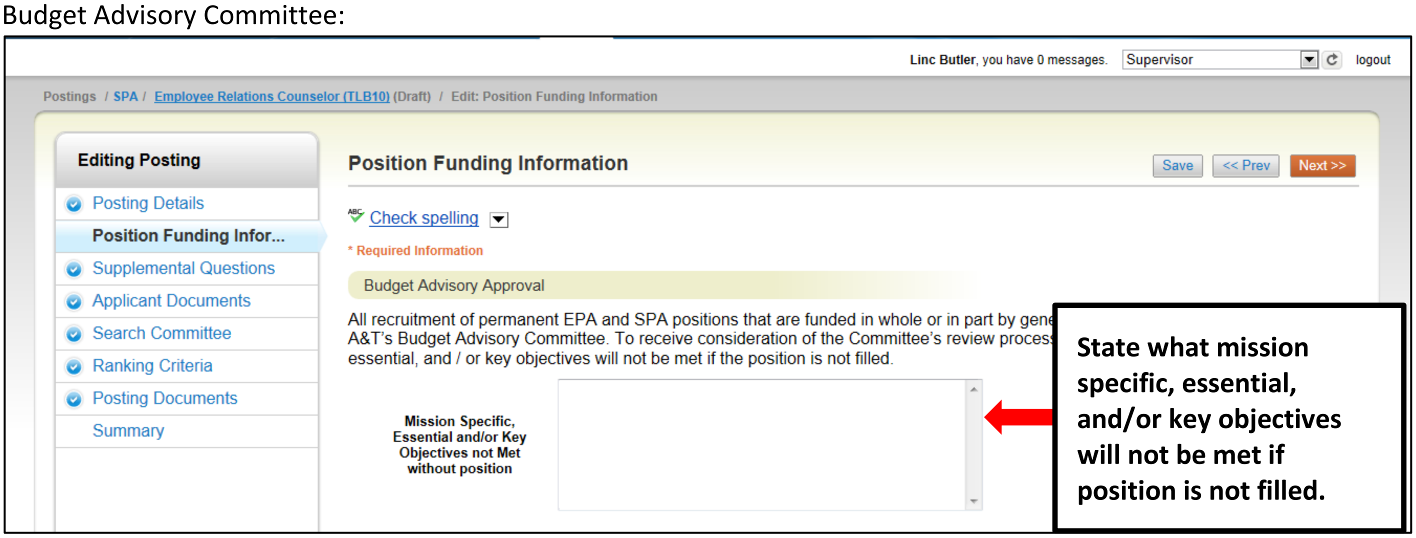
Select the most appropriate Fast Find category for the posting.

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.



Create New SHRA Posting from an Existing Posting – Position Funding Information Tab

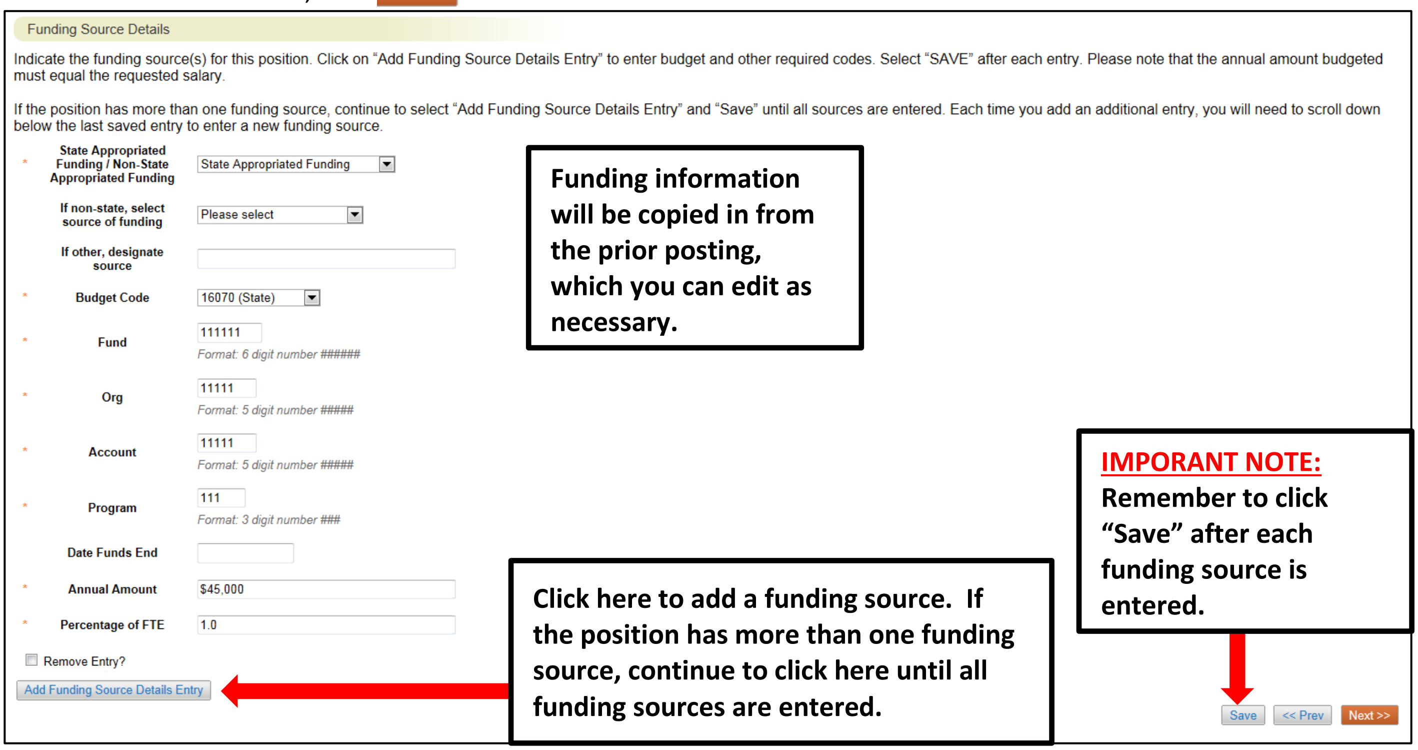
In the Budget Advisory Approval section of this tab, state what mission specific, essential, and / or key objectives will not be met if the position is not filled. All recruitment of permanent EHRA and SHRA positions that are funded in whole or in part by **general state funds** requires approval by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



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.

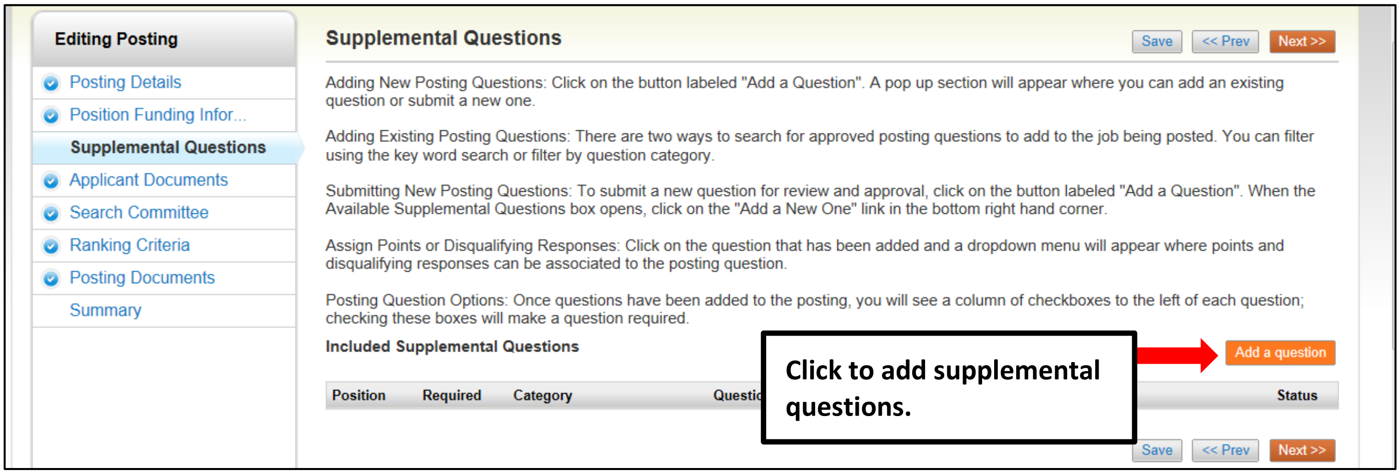
If you are unsure of what fund to use, the most up to date information may be found in **Banner Finance** on these forms:
1) **FTVORGN**- Provides a list of Org Codes
2**) FTVFUND**- Provides a list of Funds
3) **FTVACCT**- Provides a list of Accounts
These forms show listings of all active funds. For 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:



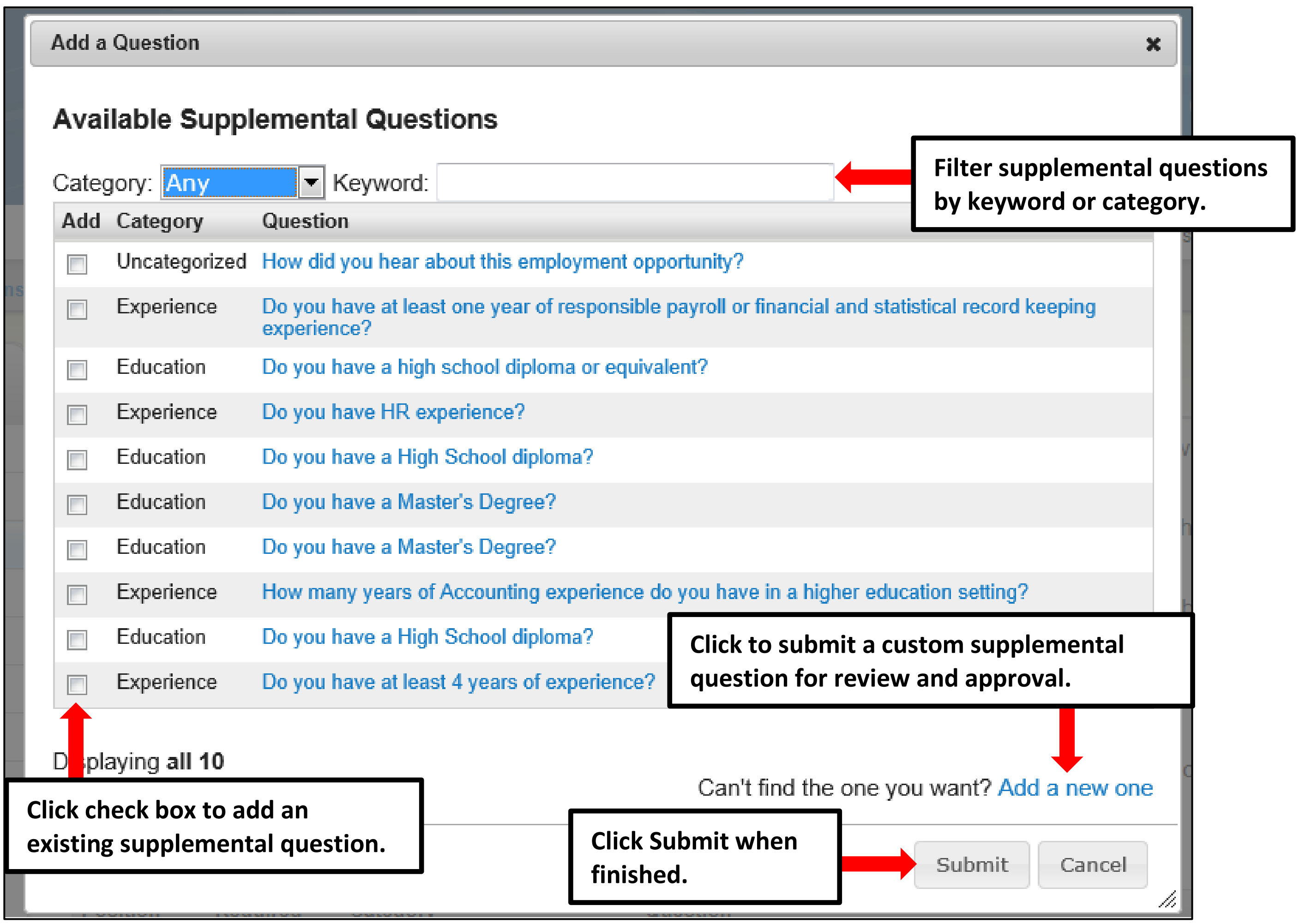
Create New SHRA Posting from an Existing Posting – Supplemental Questions Tab

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:



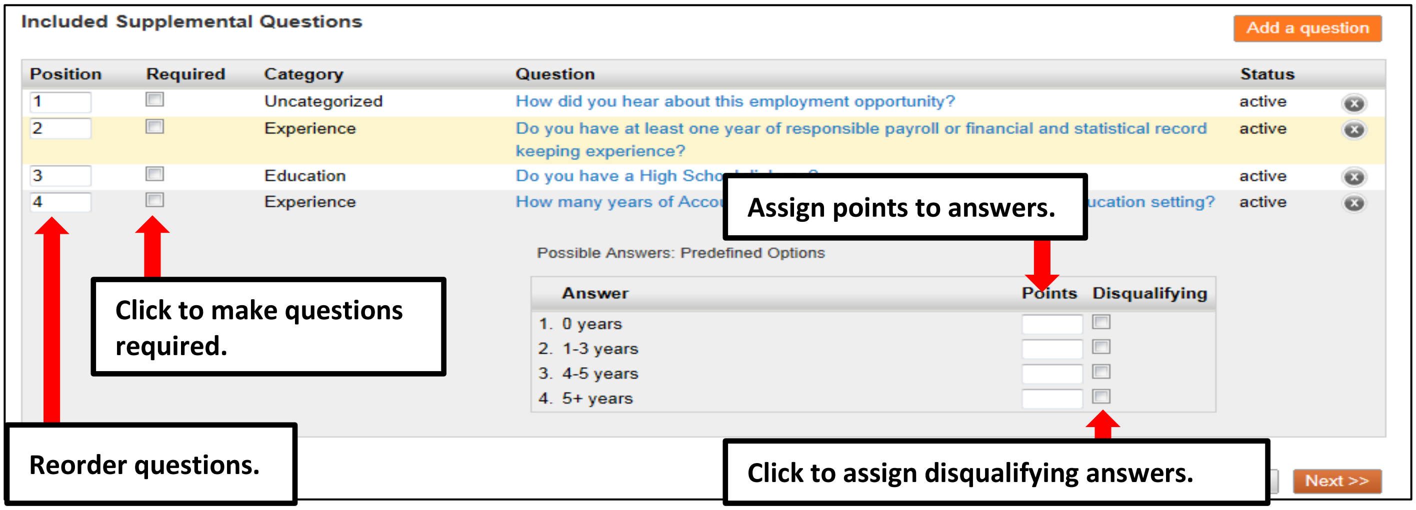
Adding Existing Posting Questions: There are two ways to search for approved posting questions to add to the job being posted. You can filter using the key word search or filter by question category. To add an existing question, click the check box next to the question you wish to add.

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.



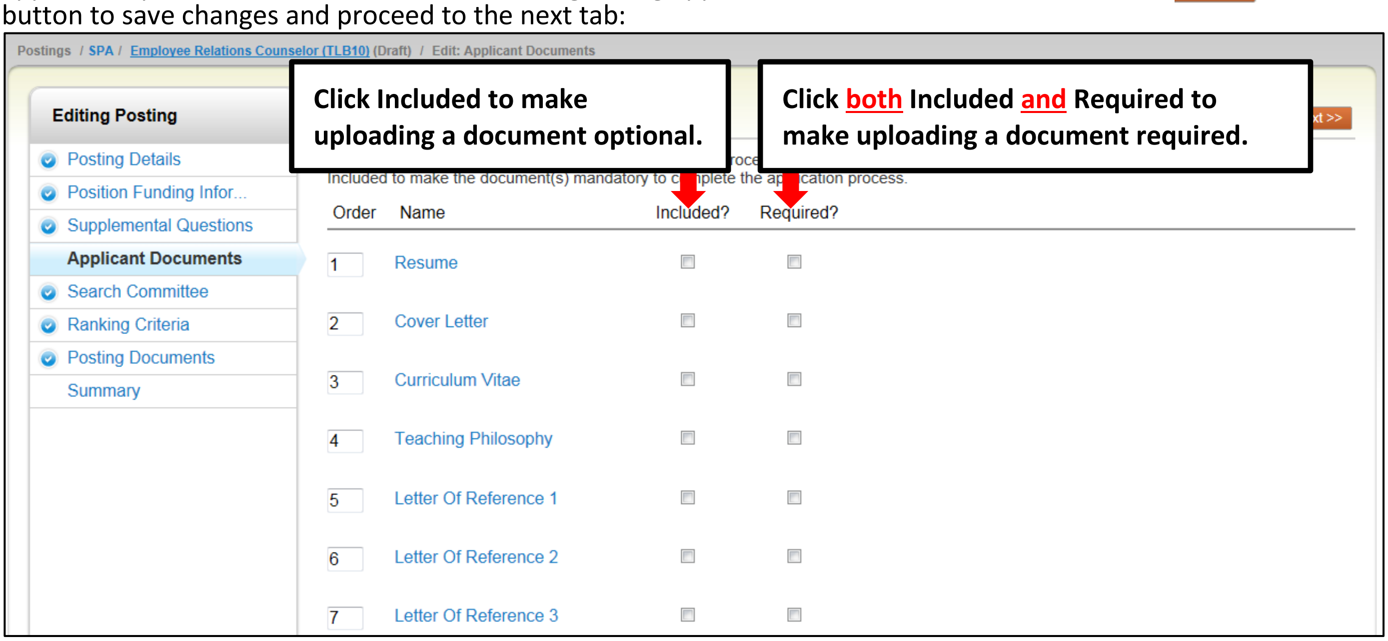
Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear where points and disqualifying responses can be associated to the posting question.

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.



Create New SHRA Posting from an Existing Posting – Applicant Documents Tab

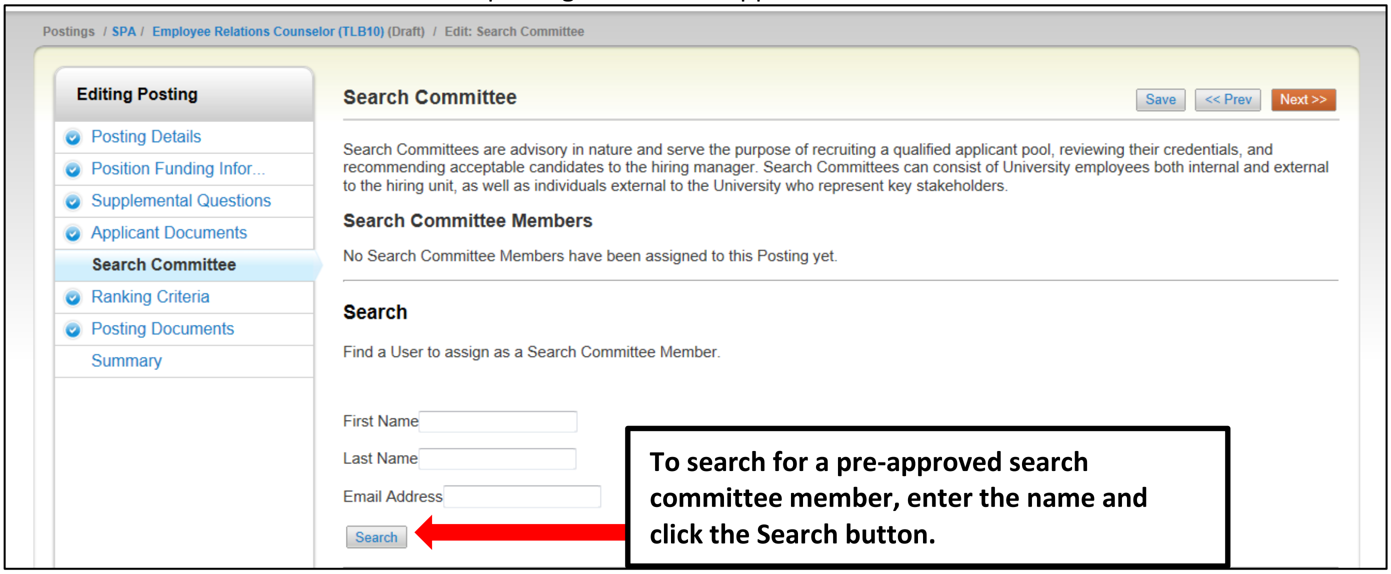
In the **Applicant Documents** tab, Applicant documents can be included in the application process by selecting **Included** to make the documents optional and **Required and Included** to make the document(s) mandatory to complete the application process. Documents attached by the applicant during the 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:



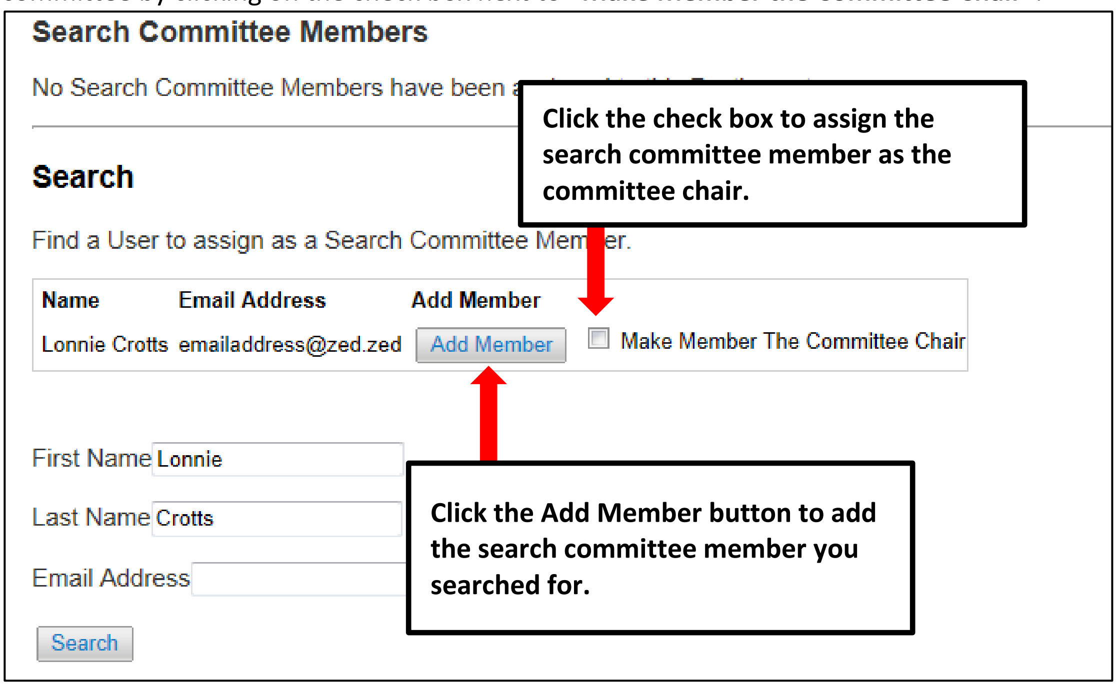
Create New SHRA Posting from an Existing Posting – Search Committee Tab

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.

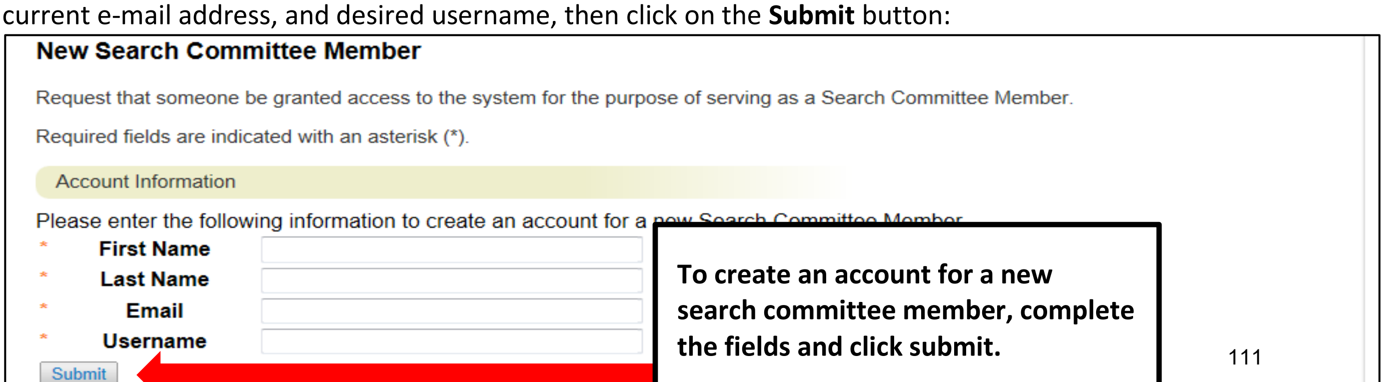
In the **Search Committee** tab, you can assign search committee members who will have access to review application information for a specific posting. Search committee members can view applications, applicant documents, and evaluate / rank applicants based upon ranking criteria you establish as part 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:



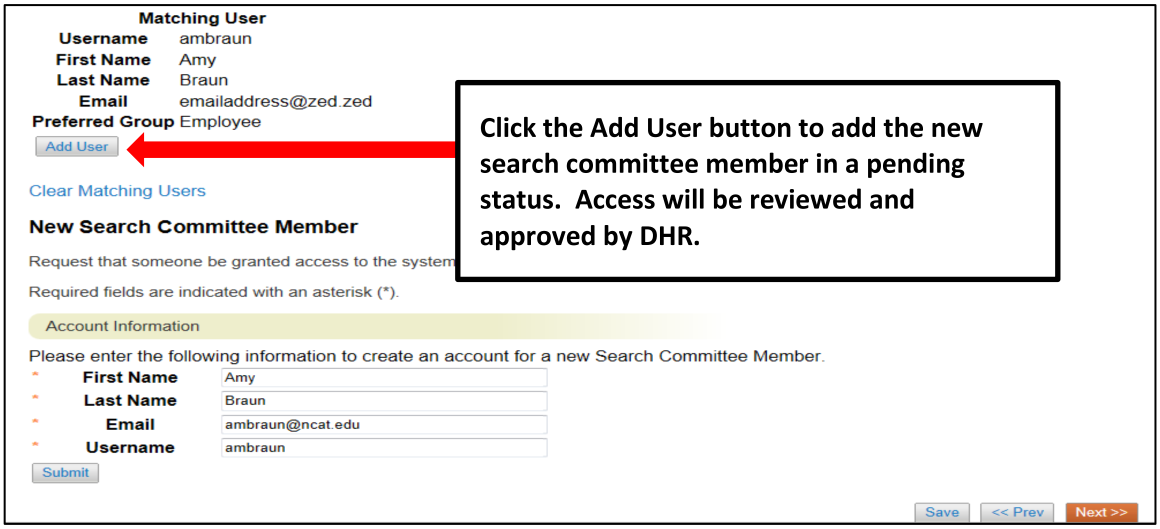
After searching for a pre-approved search committee member, click on the **Add Member** button to add them to your search committee. You can also make a search committee member the chair of the search committee by clicking on the check box next to **"Make Member the Committee Chair"**:



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:

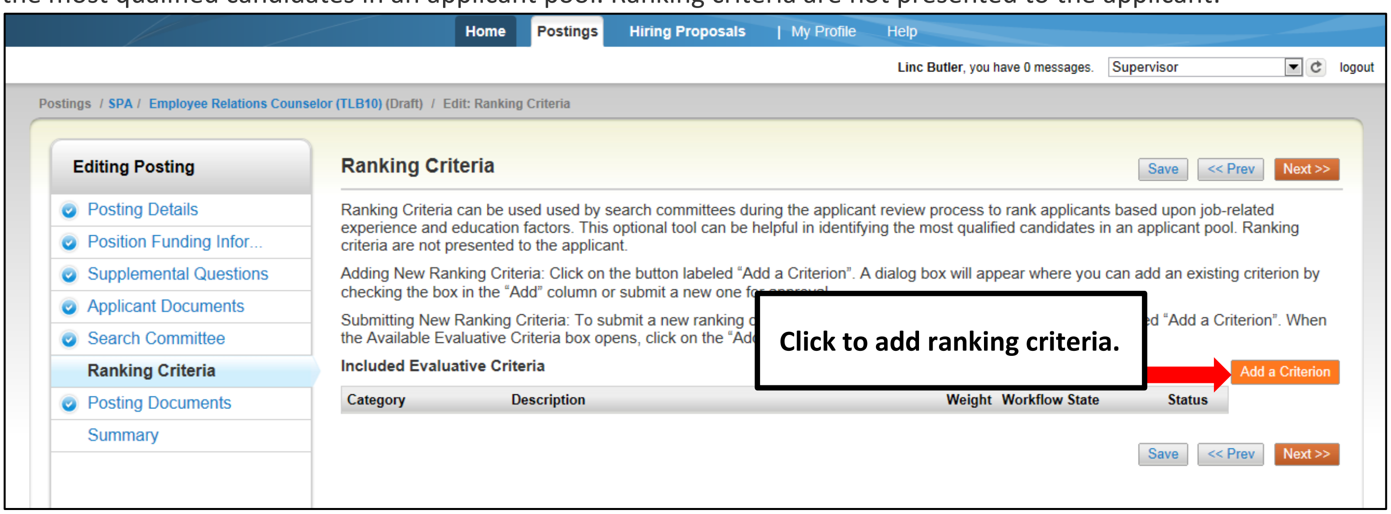


If the requested search committee member is already an assigned user of the PeopleAdmin system, their user account information will be displayed, and you can add them to your search committee by clicking on the **Add User** button:

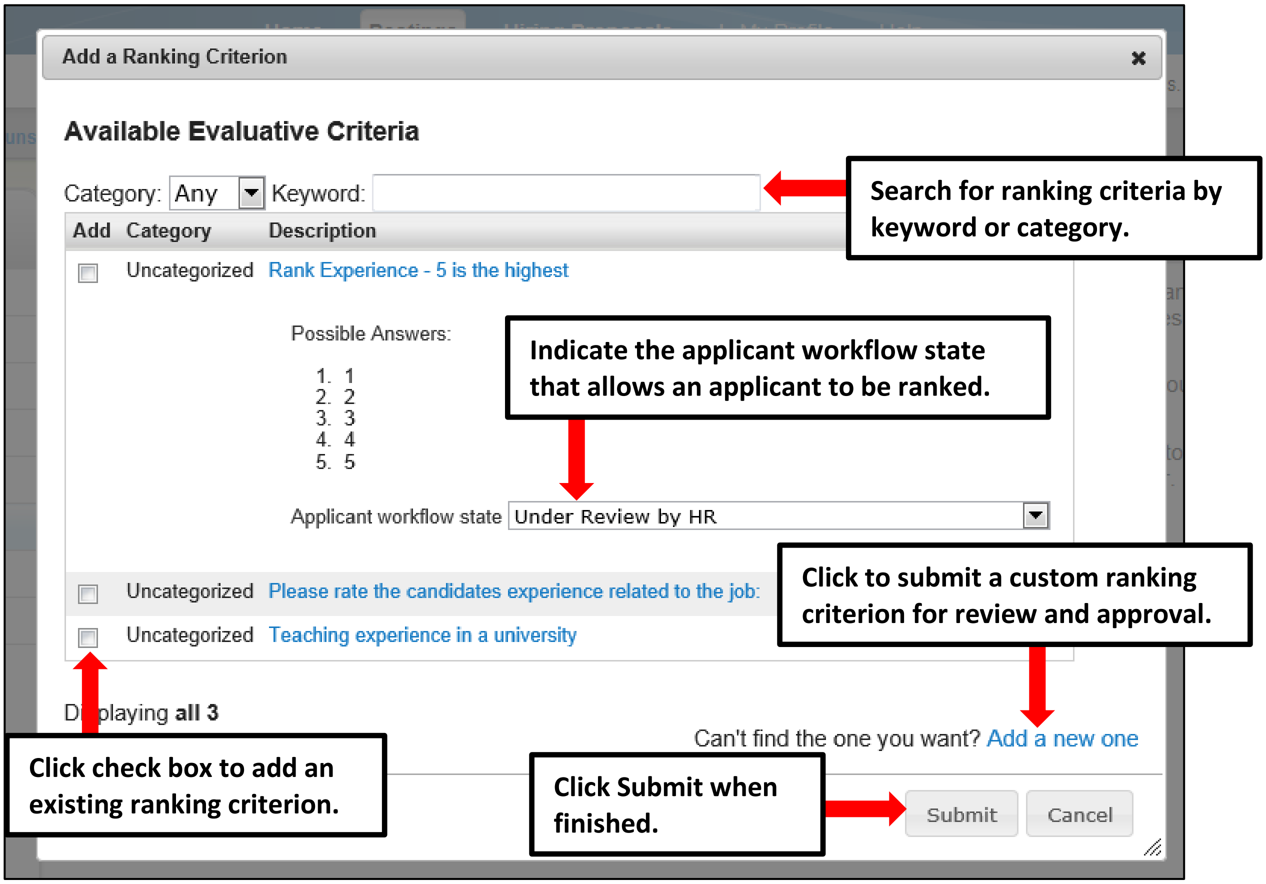


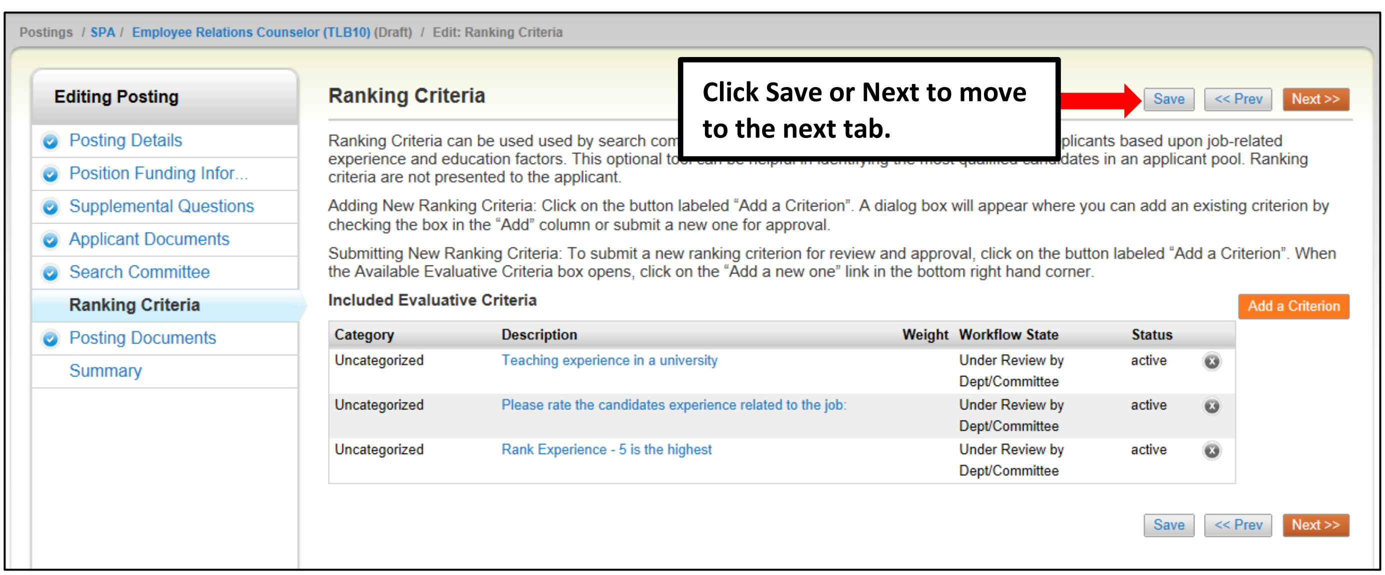
Create New SHRA Posting from an Existing Posting – Ranking Criteria Tab

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:



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.



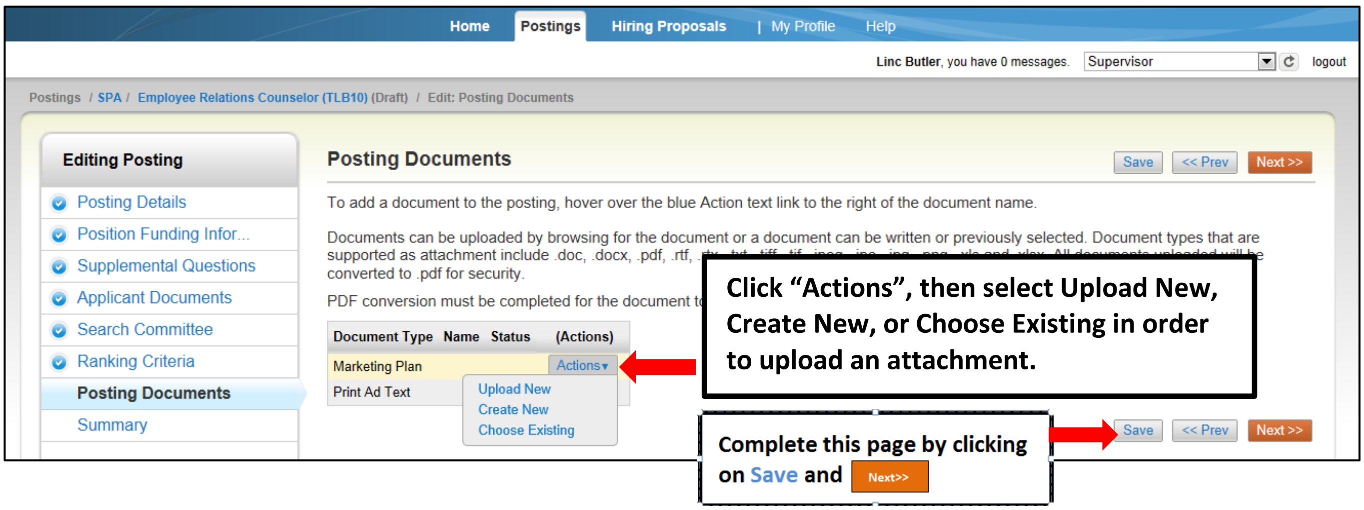


Create New SHRA Posting from an Existing Posting – Posting Documents Tab

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.

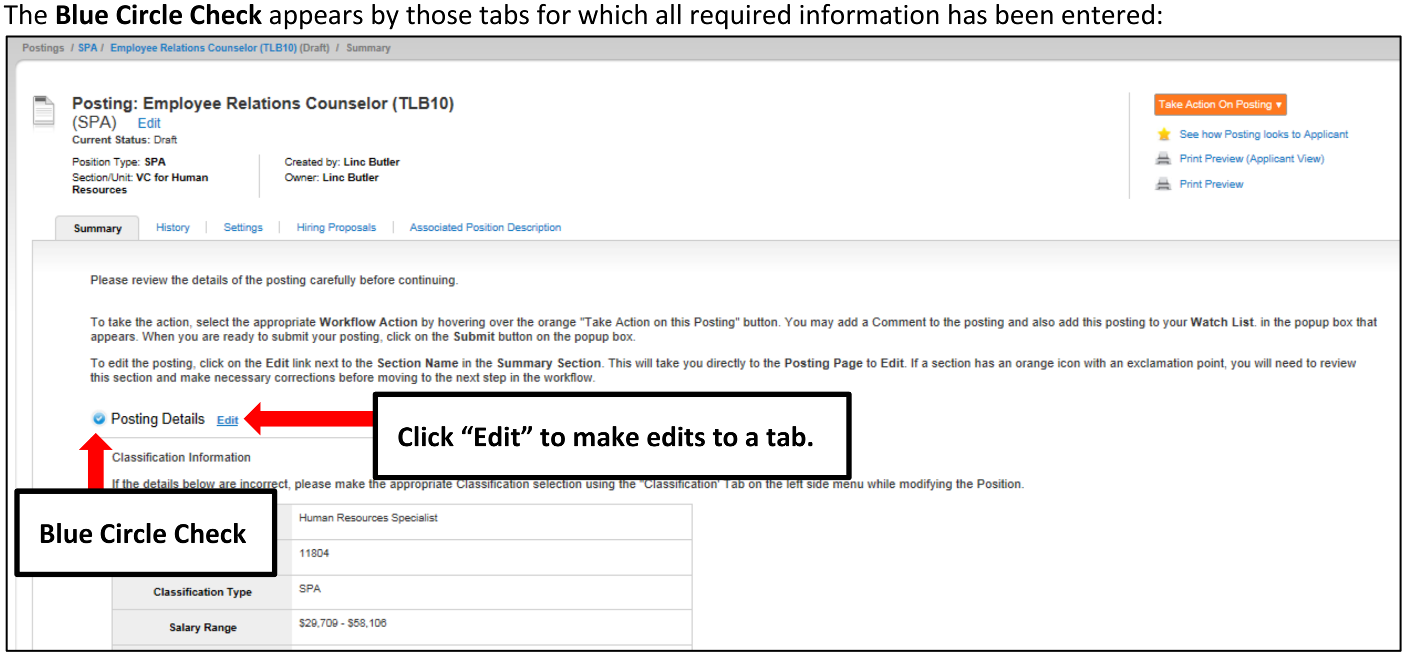
Excel and Word documents may be attached. PDF conversion must be completed for the document to be valid when applicable:



Create New SHRA Posting from an Existing Posting – Summary Tab

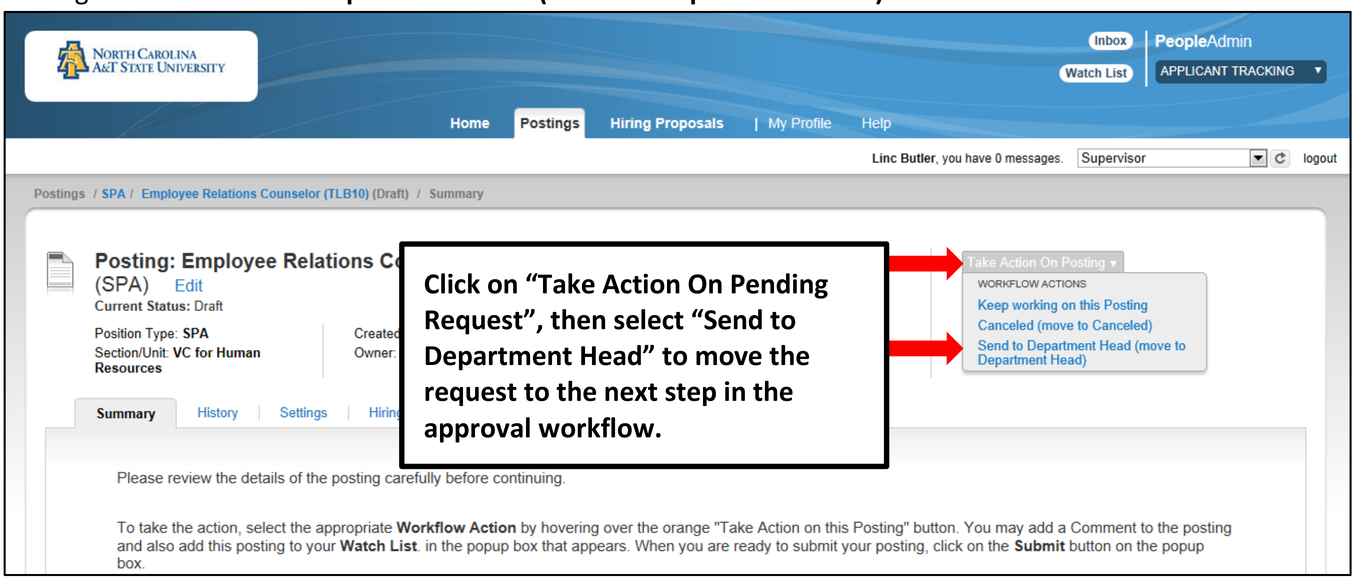
The **Summary Tab** allows you to perform a final review all of the posting information you've entered on the previous tabs prior to sending the request to the next step in the approval workflow. Please review the details of the posting summary carefully before continuing.

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

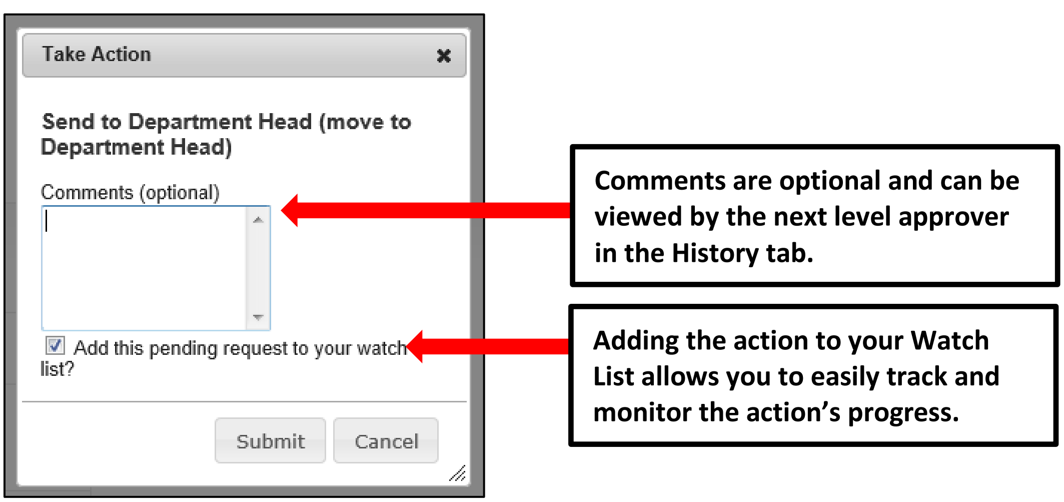


An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save",** and then return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

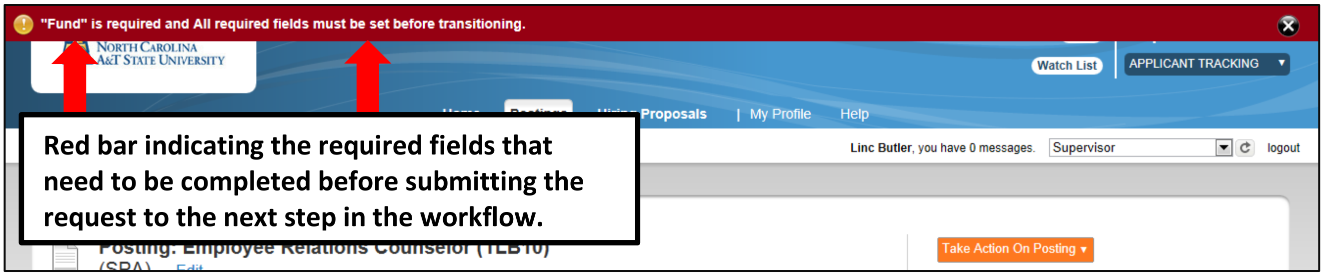
Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example,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



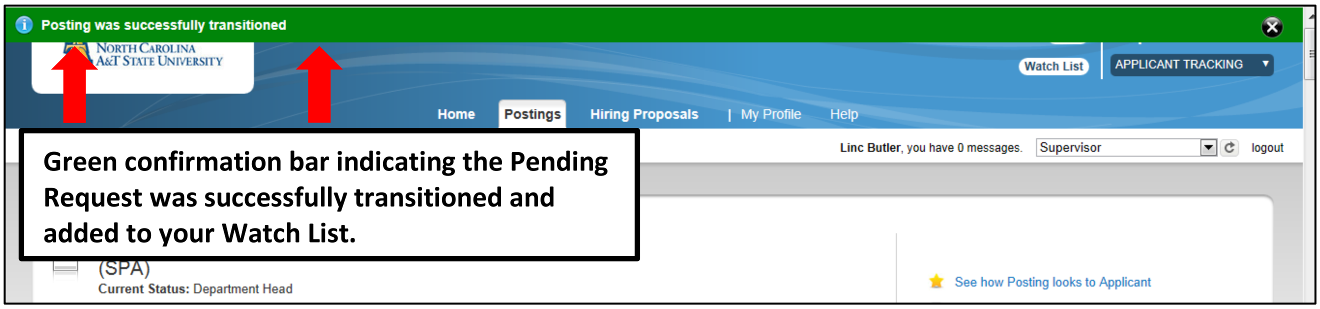
You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send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



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

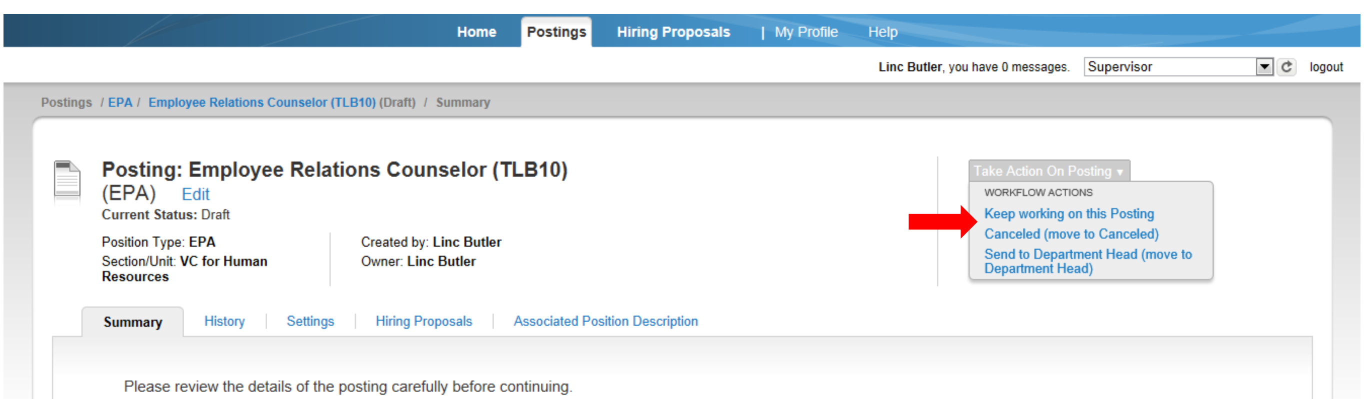


The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if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

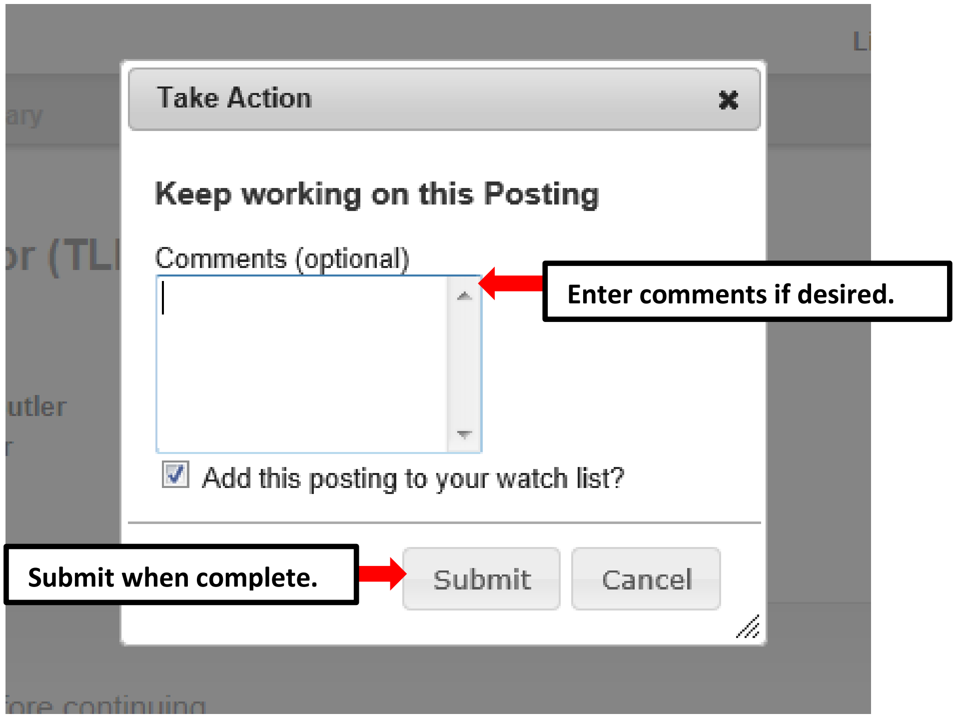
Create New SHRA Posting from an Existing Posting - Saving to Return to a Pending Request Later

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"



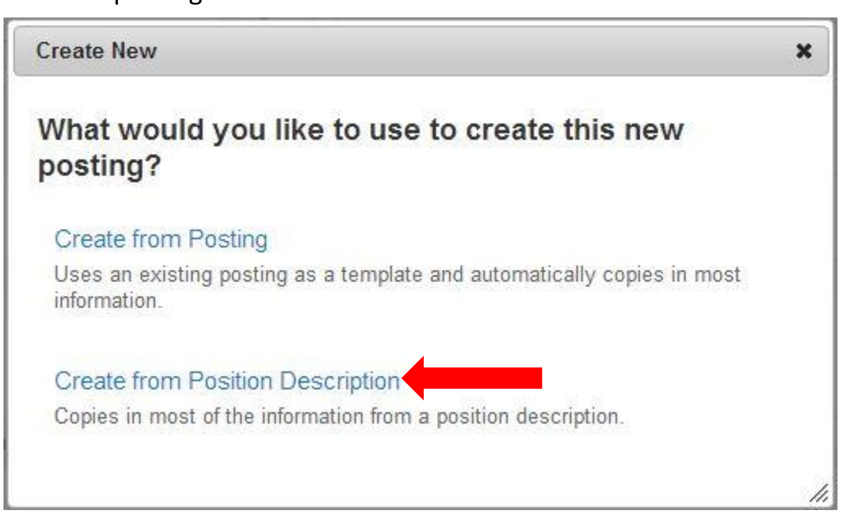
The **Posting** can be located when you log into the Applicant Tracking module again as the same **User Type** you used to begin the action. Hover your cursor over the **Postings tab** and click on "**SHRA**" You will then return to the **SHRA Postings view**, which provides a list of all postings based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

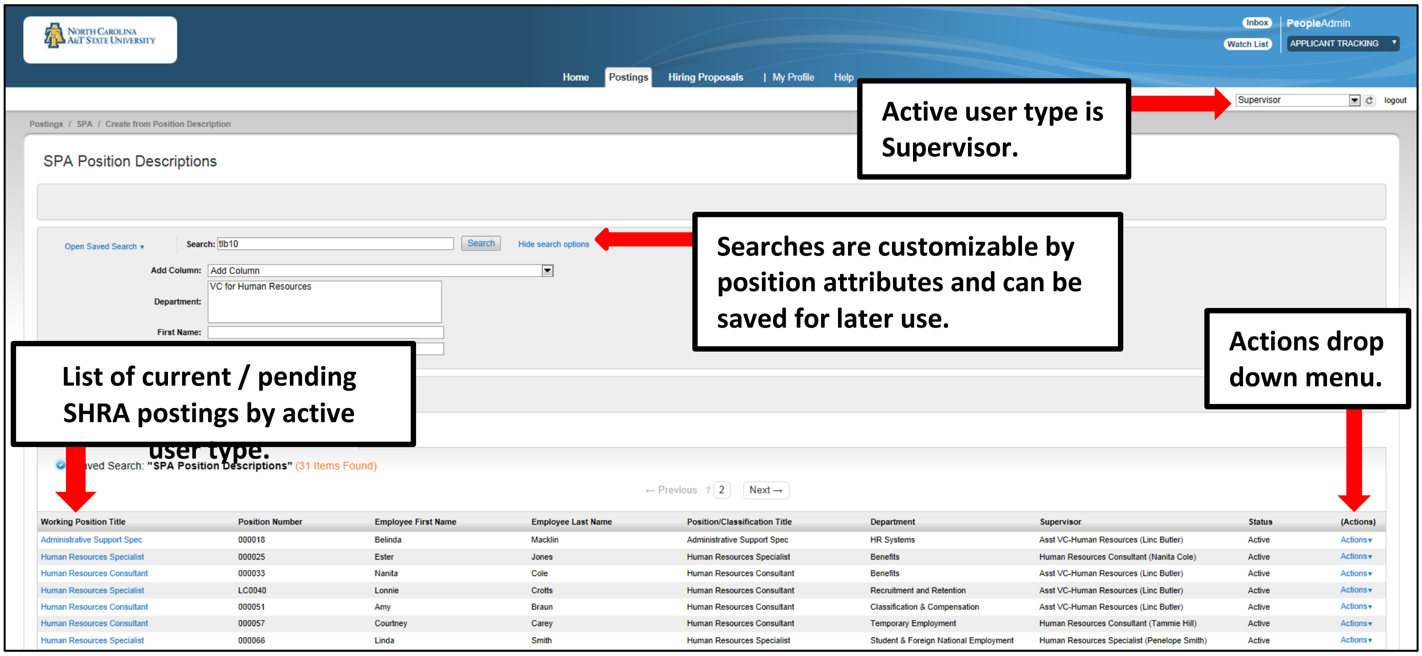
Select **Create from Position Description** if you wish to create a posting using information from a position description that has previously been approved in the PeopleAdmin system.

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.

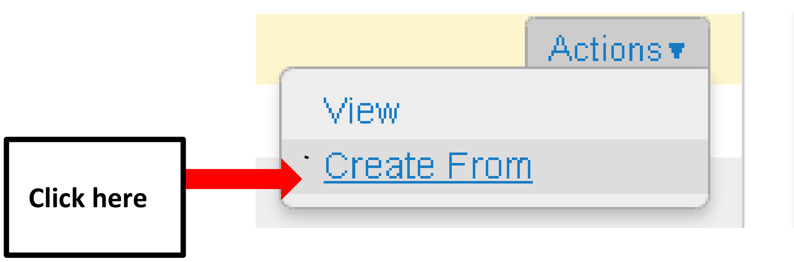
Choosing the **Create from Position Description** option copies information from an existing position description into a new posting:



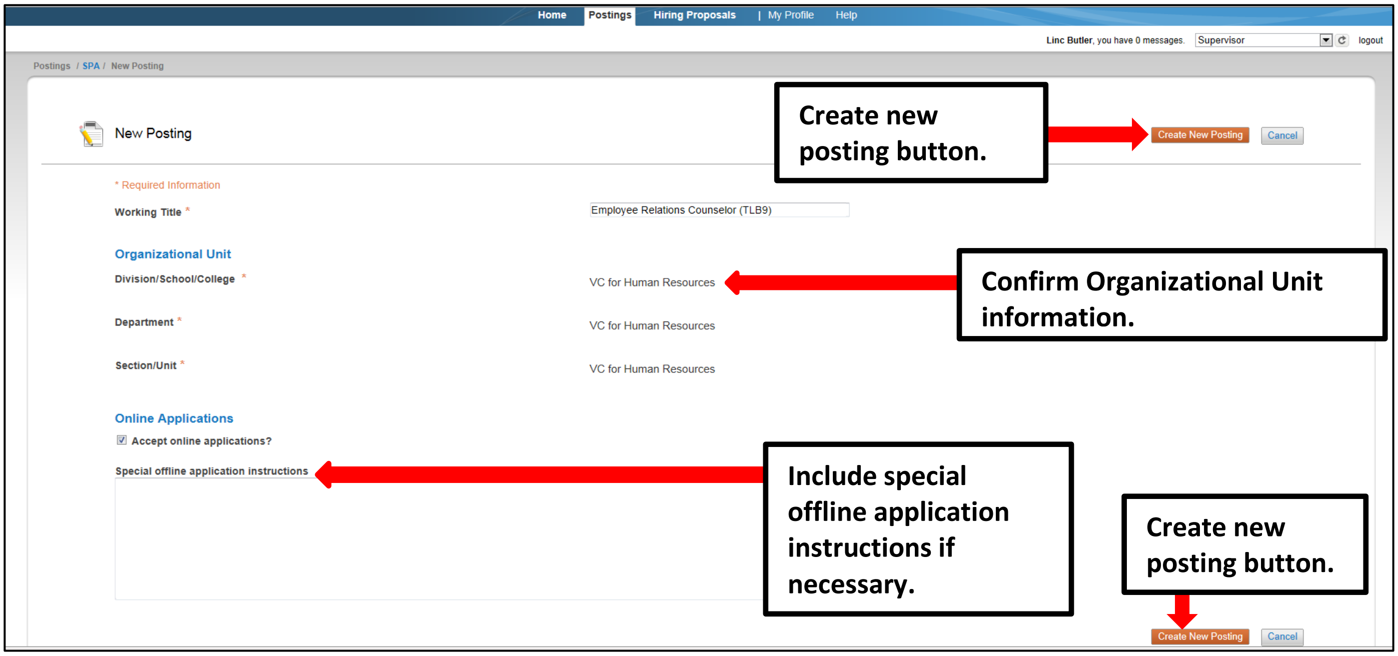
After clicking on **Create from Position Description,** you will be taken to the **SHRA Position Descriptions** view, where you can search position descriptions by any number of criteria, including but not limited to position title, posting number, position number, department name, or supervisor name. 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 [Classification and Compensation Analyst]() in the Division of Human Resources:



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:**



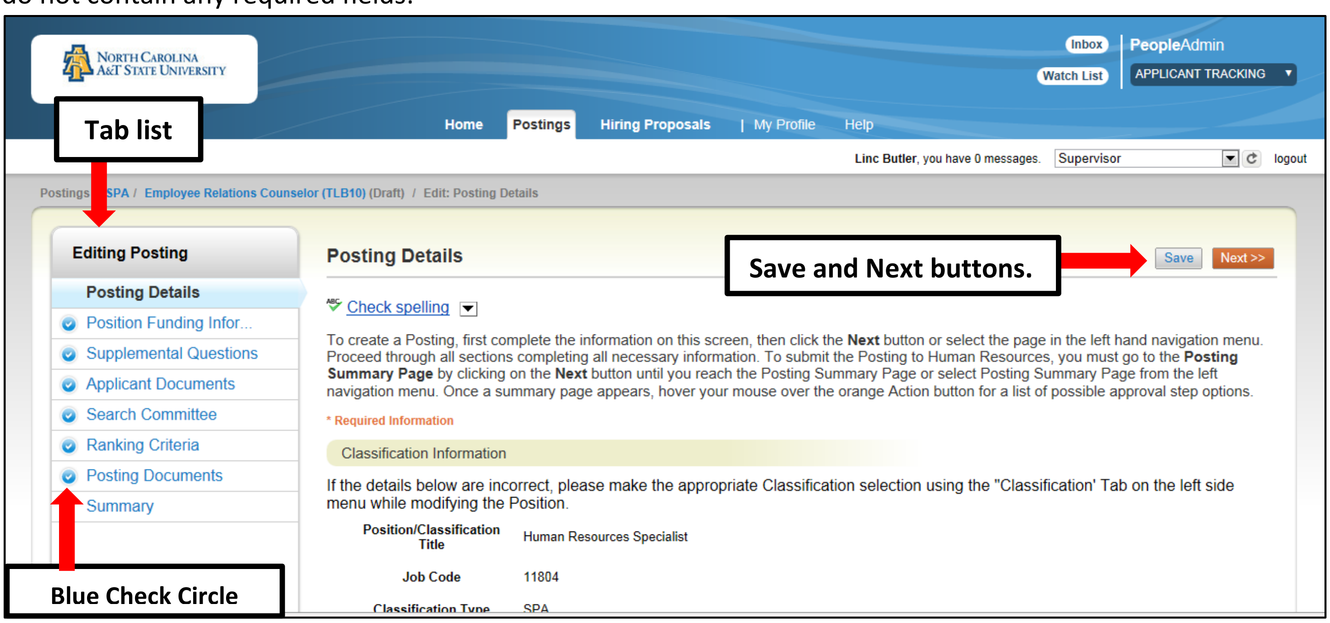
By clicking **Create From**, the **New Posting** form will appear. This is where you can update the working title of the position for the purpose of posting, and view **Organizational Unit** information to confirm accuracy. You can also provide **Special Offline Application Instructions** in the field 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:



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 all other tabs will appear as blue links.

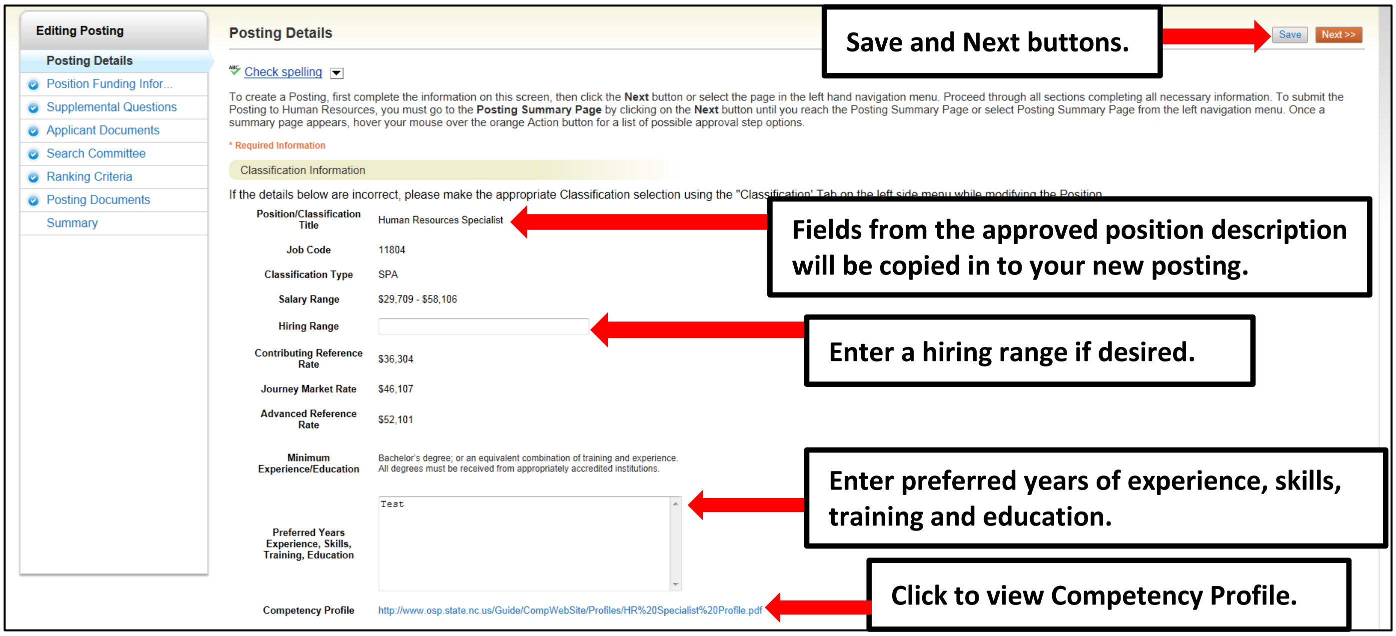
You can save the changes you've made to the active tab you're working on and navigate to the next tab in the list simultaneously by clicking the Next >> button located in both the top and bottom right corners of the page. You can save the active tab you're working on and stay on the same tab by clicking 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.

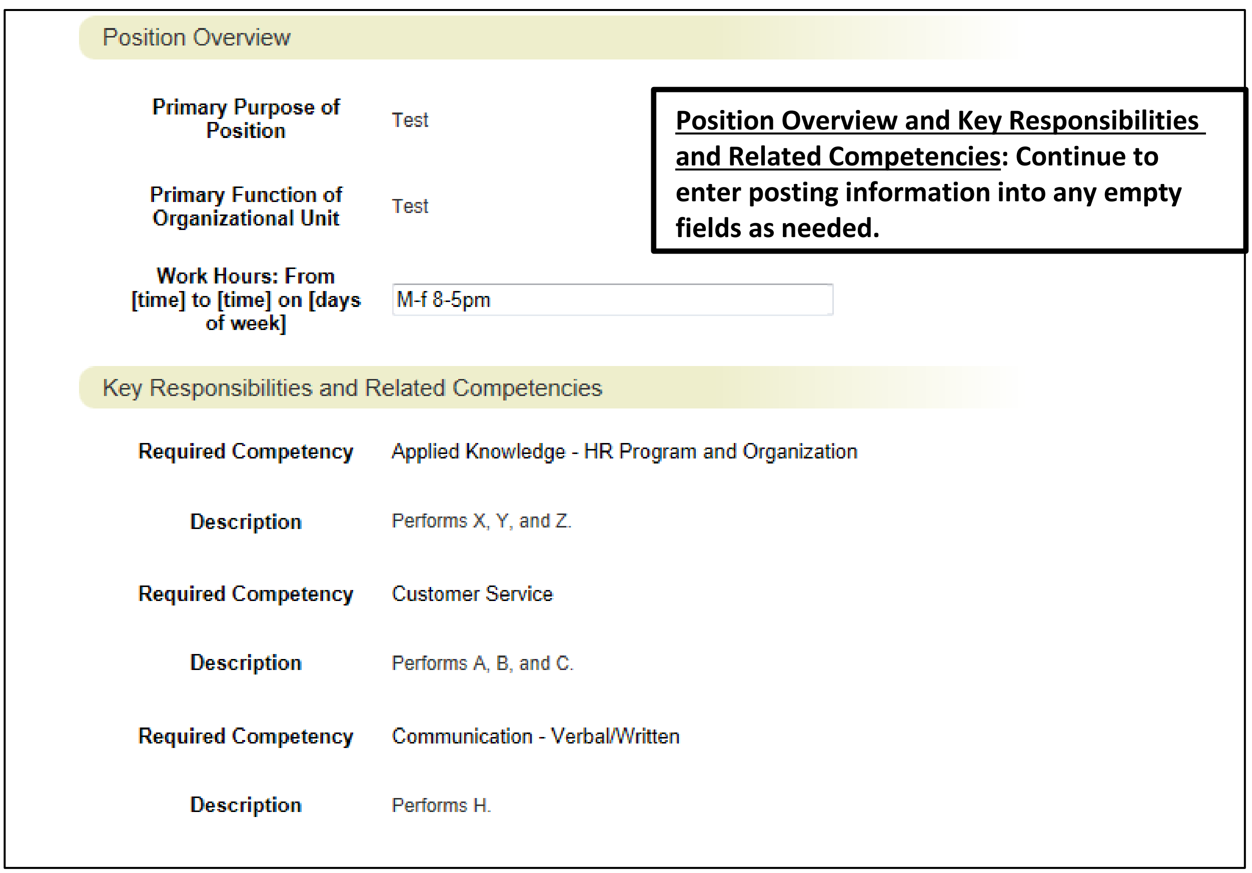
Required fields are highlighted in **red** and must be filled in before the new **SHRA Posting** can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check Circle**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

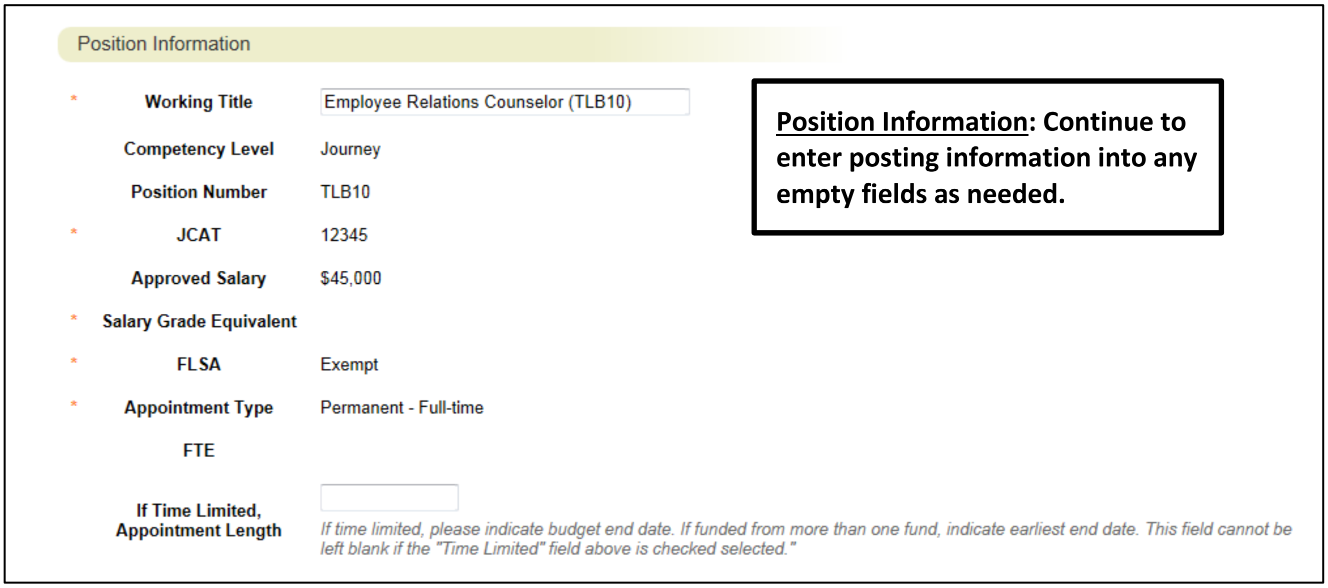


Create New SHRA Posting from a Position Description – Posting Details Tab

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 click the Next >> button to save changes and navigate to the next tab:





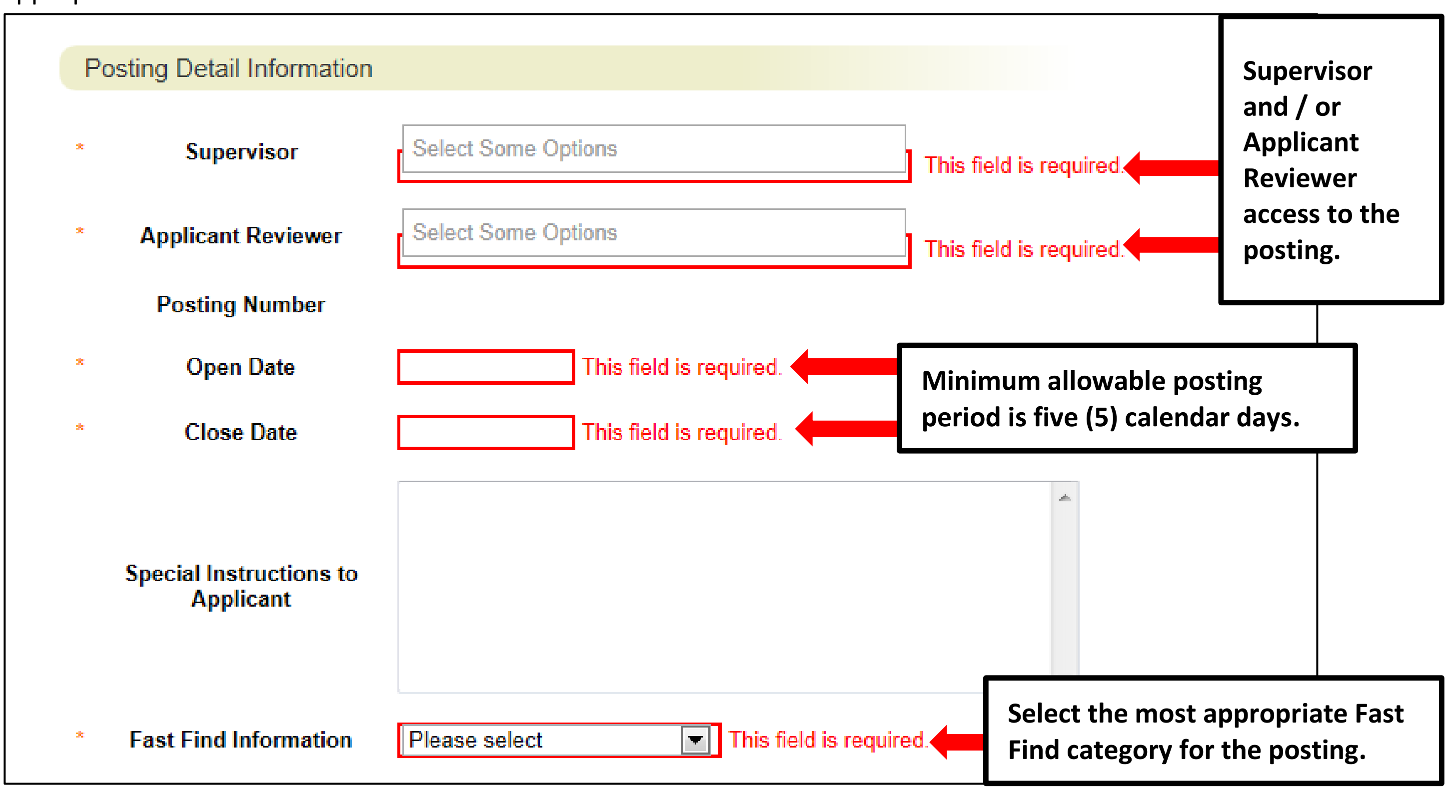


Position Information

*	Working Title	Employee Relations Counselor (TLB10)
	Competency Level	Journey
	Position Number	TLB10
*	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 funded from more than one fund, indicate earliest end date. This field cannot be left blank if the "Time Limited" field above is checked selected."*

<u>Position Information</u>: Continue to enter posting information into any empty fields as needed.

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

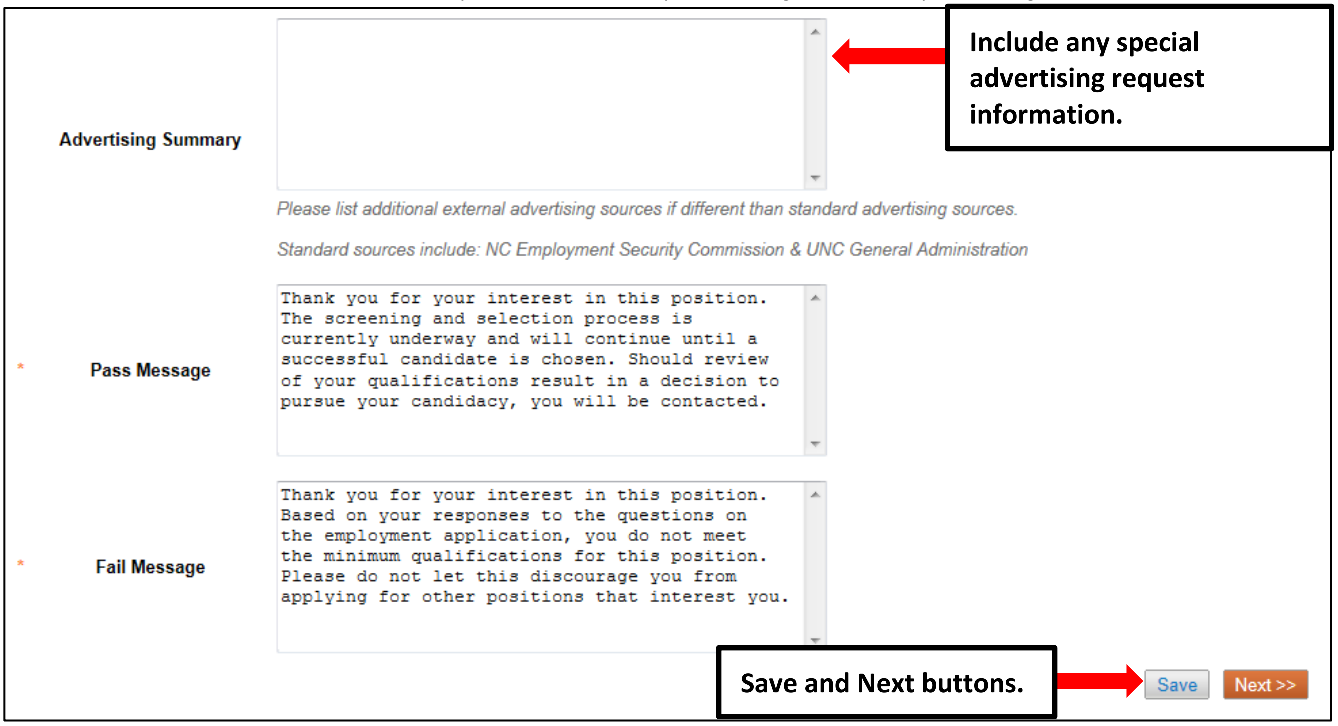
*	Supervisor	Select Some Options	This field is required.
*	Applicant Reviewer	Select Some Options	This field is required.
	Posting Number		
*	Open Date		This field is required.
*	Close Date		This field is required.
	Special Instructions to Applicant		
*	Fast Find Information	Please select	This field is required.

Supervisor and / or Applicant Reviewer access to the posting.

Minimum allowable posting period is five (5) calendar days.

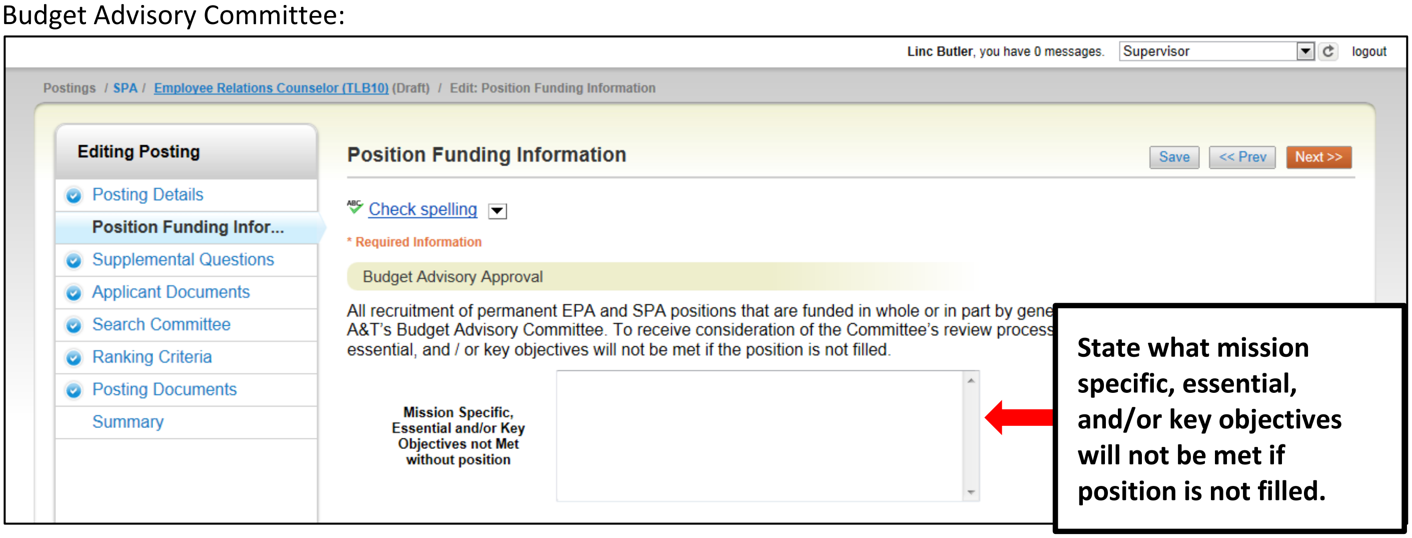
Select the most appropriate Fast Find category for the posting.

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.



Create New SHRA Posting from a Position Description – Position Funding Information Tab

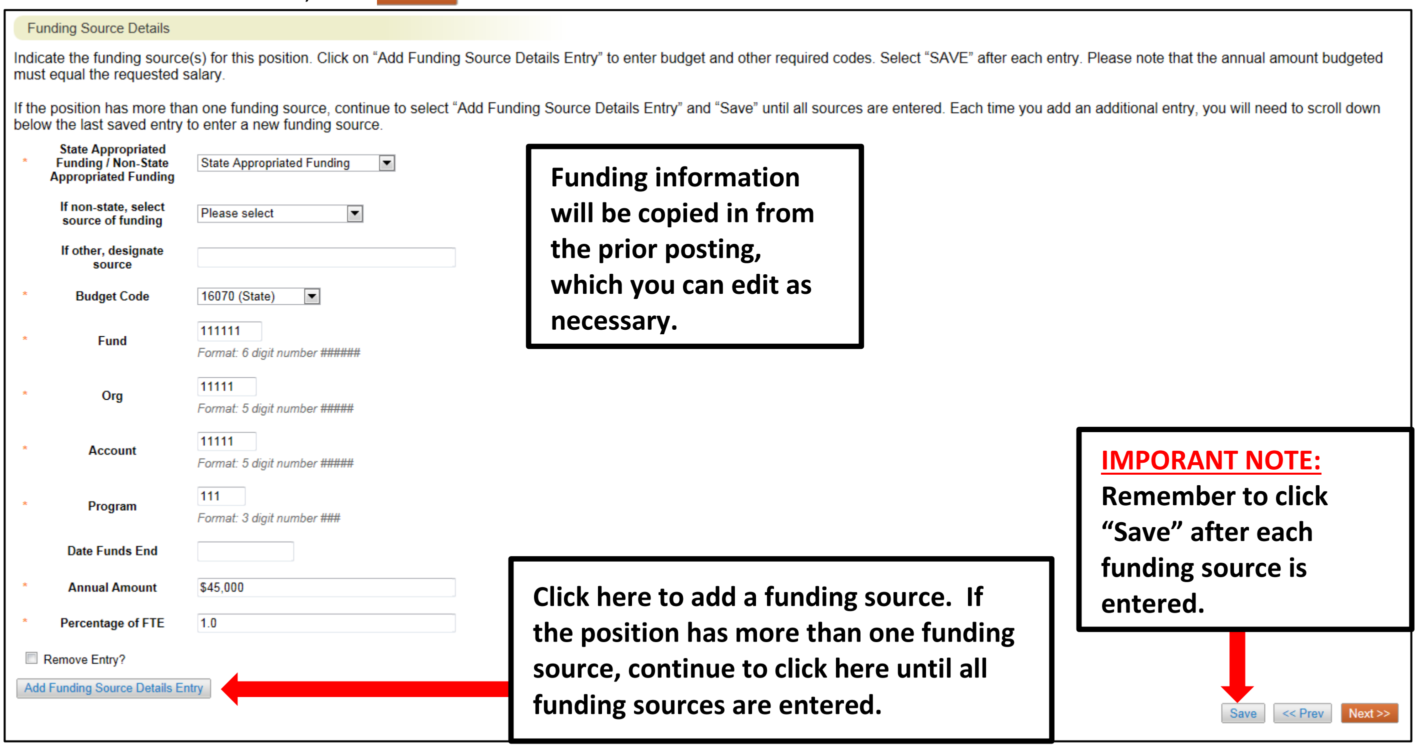
In the Budget Advisory Approval section of this tab, state what mission specific, essential, and / or key objectives will not be met if the position is not filled. All recruitment of permanent EHRA and SHRA positions that are funded in whole or in part by **general state funds** requires approval by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



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
If non-state, select source of funding	Please select
If other, designate source	
* 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

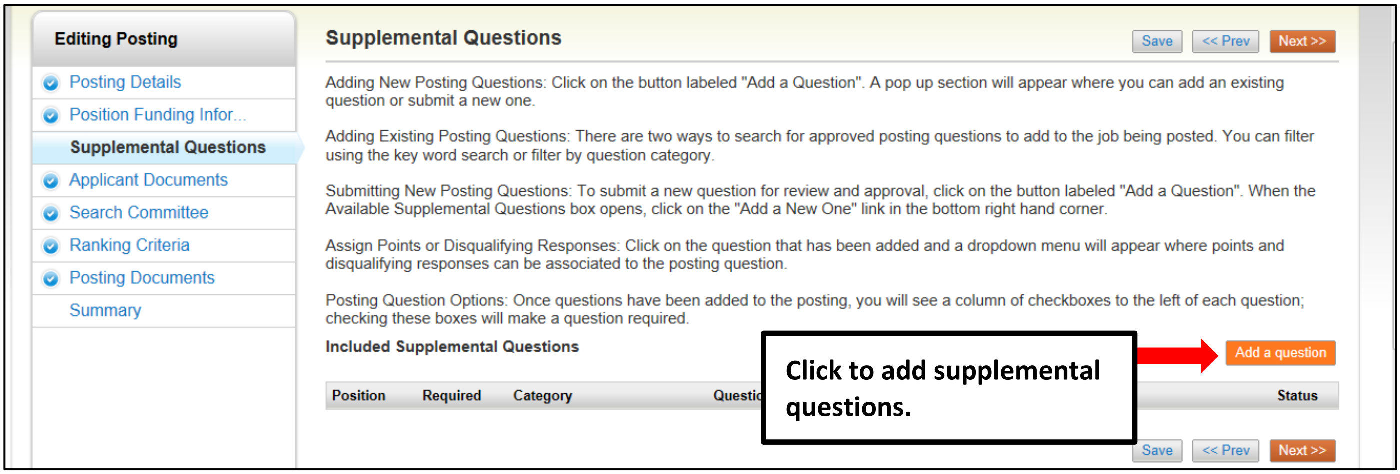
Remove Entry?

Add Funding Source Details Entry

Save | << Prev | Next >>

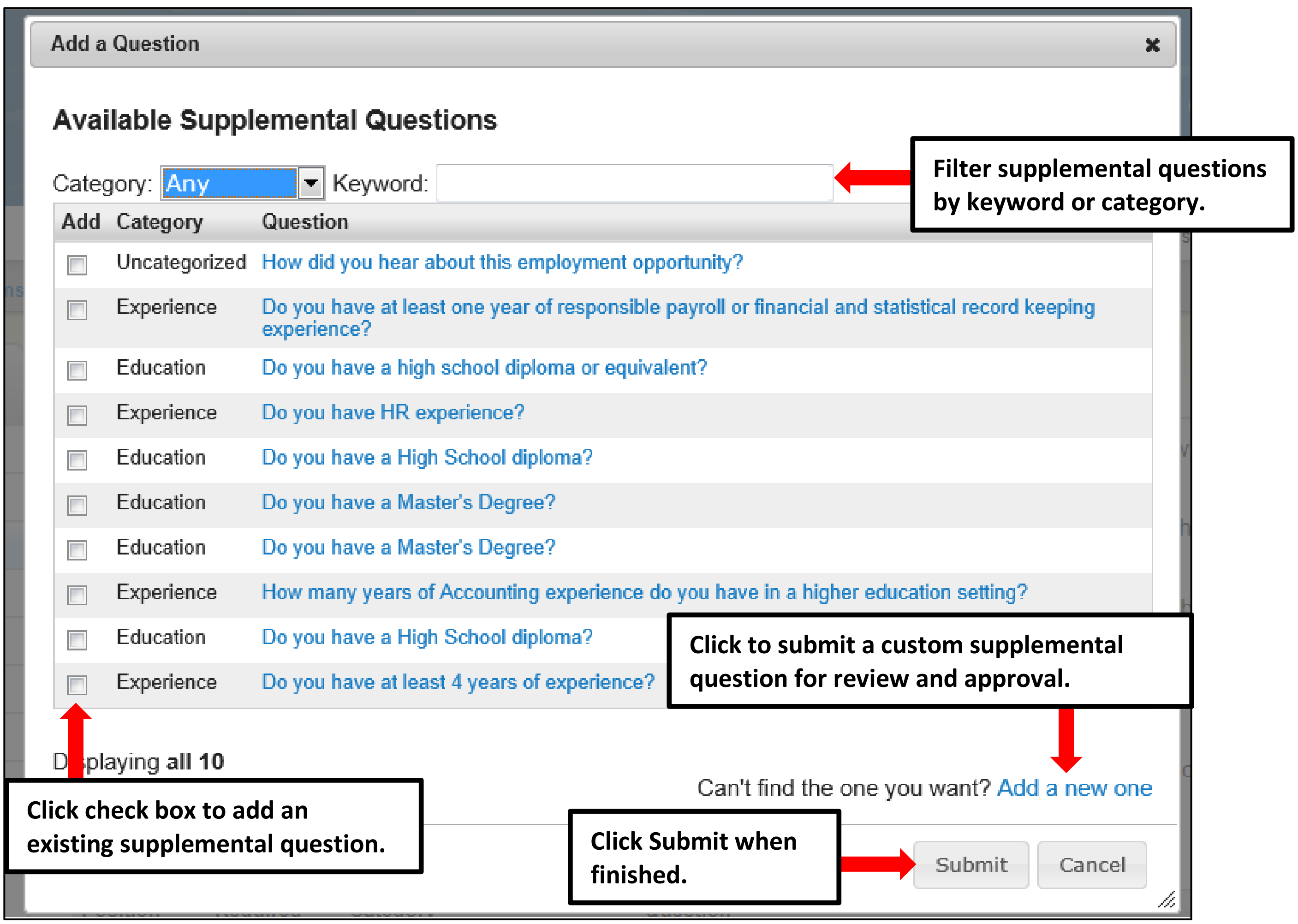
Create New SHRA Posting from a Position Description – Supplemental Questions Tab

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:



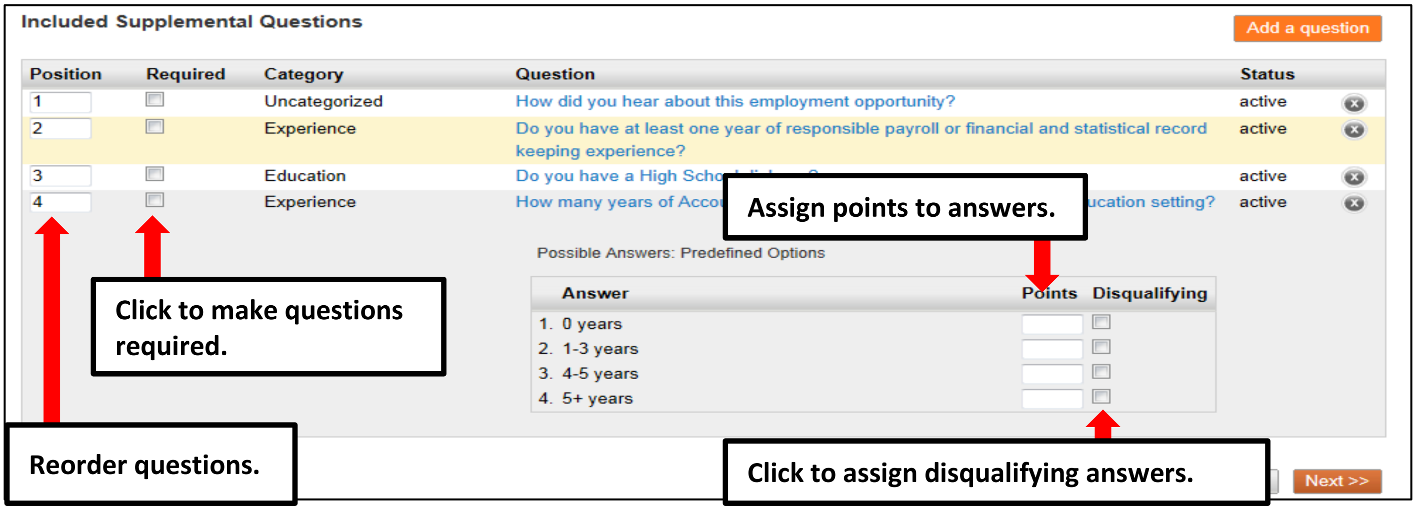
Adding Existing Posting Questions: There are two ways to search for approved posting questions to add to the job being posted. You can filter using the key word search or filter by question category. To add an existing question, click the check box next to the question you wish to add.

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.



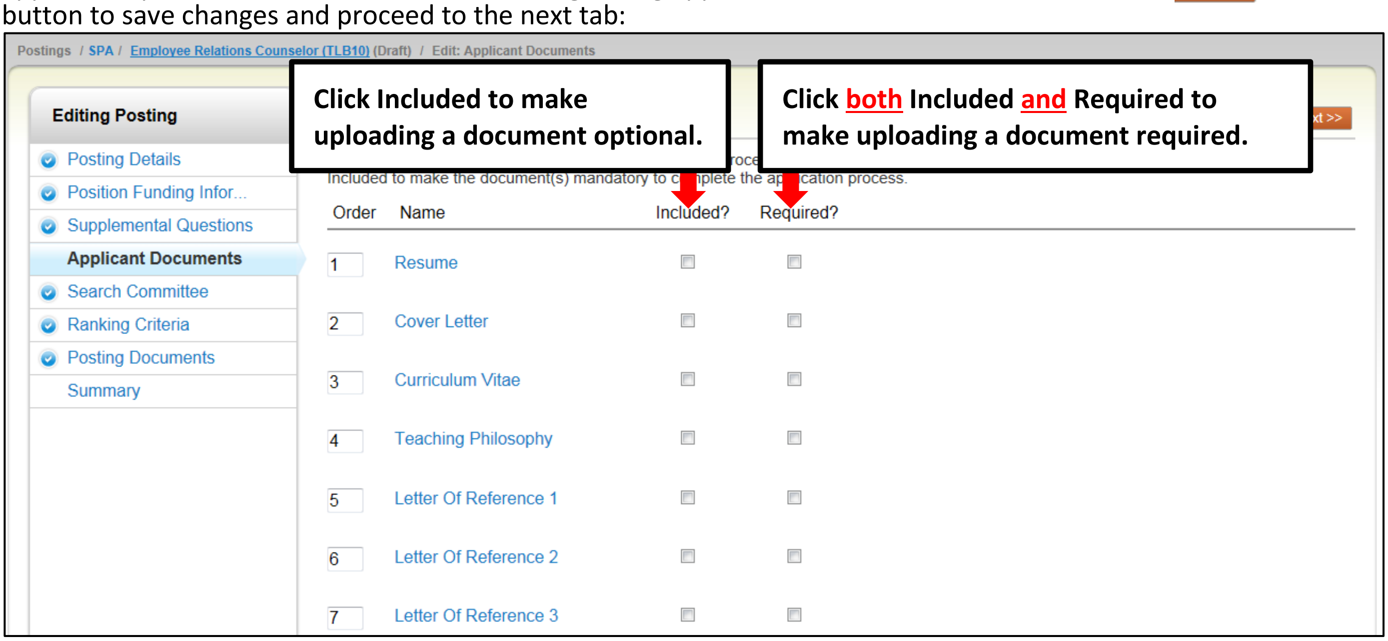
Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear where points and disqualifying responses can be associated to the posting question.

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.



Create New SHRA Posting from a Position Description – Applicant Documents Tab

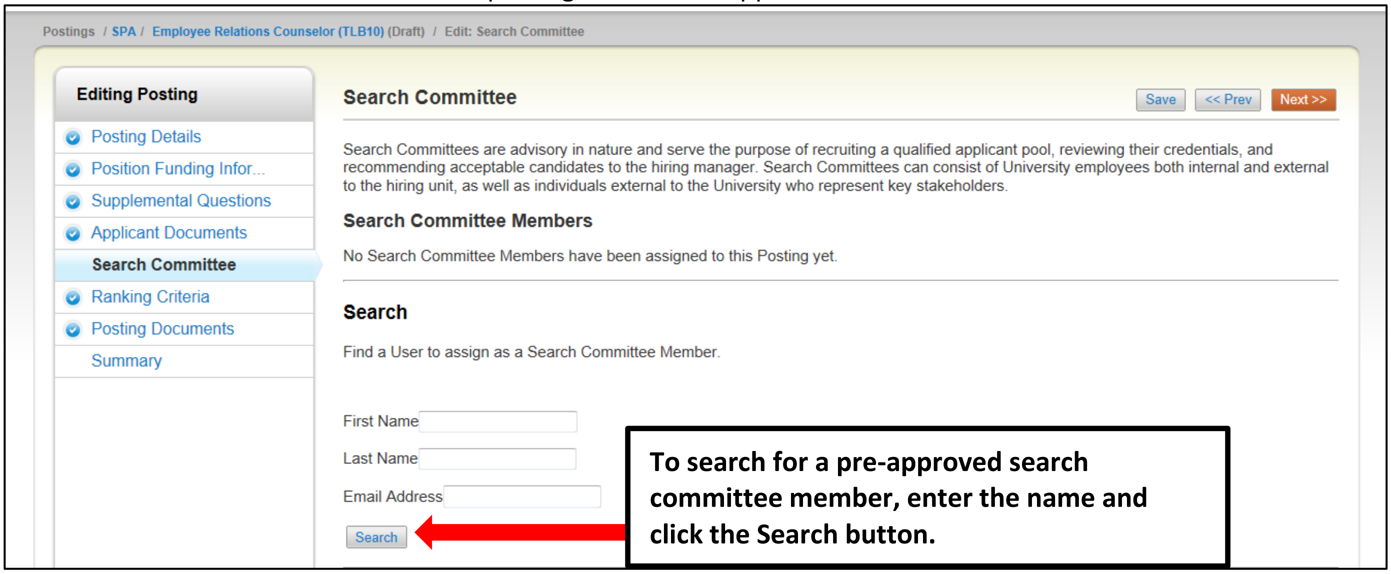
In the **Applicant Documents** tab, Applicant documents can be included in the application process by selecting **Included** to make the documents optional and **Required and Included** to make the document(s) mandatory to complete the application process. Documents attached by the applicant during the 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:



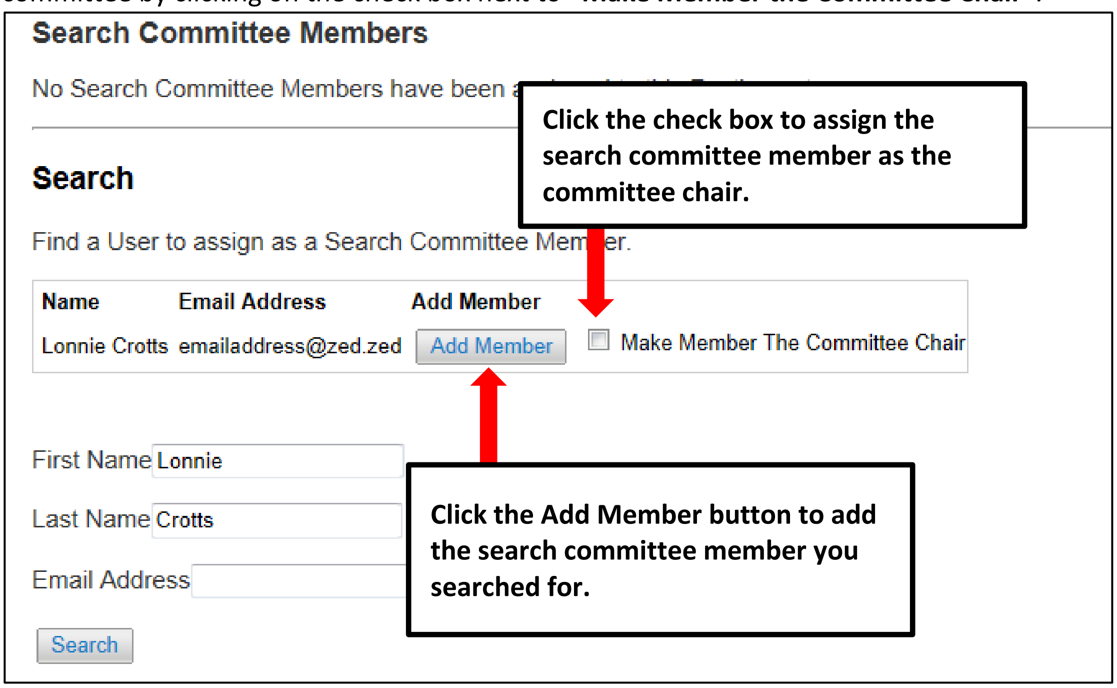
Create New SHRA Posting from a Position Description – Search Committee Tab

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.

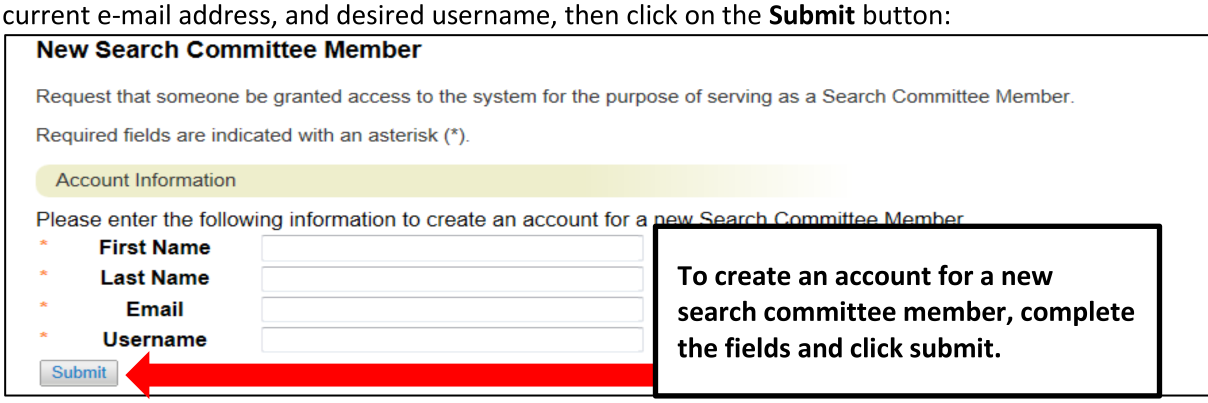
In the **Search Committee** tab, you can assign search committee members who will have access to review application information for a specific posting. Search committee members can view applications, applicant documents, and evaluate / rank applicants based upon ranking criteria you establish as part 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:



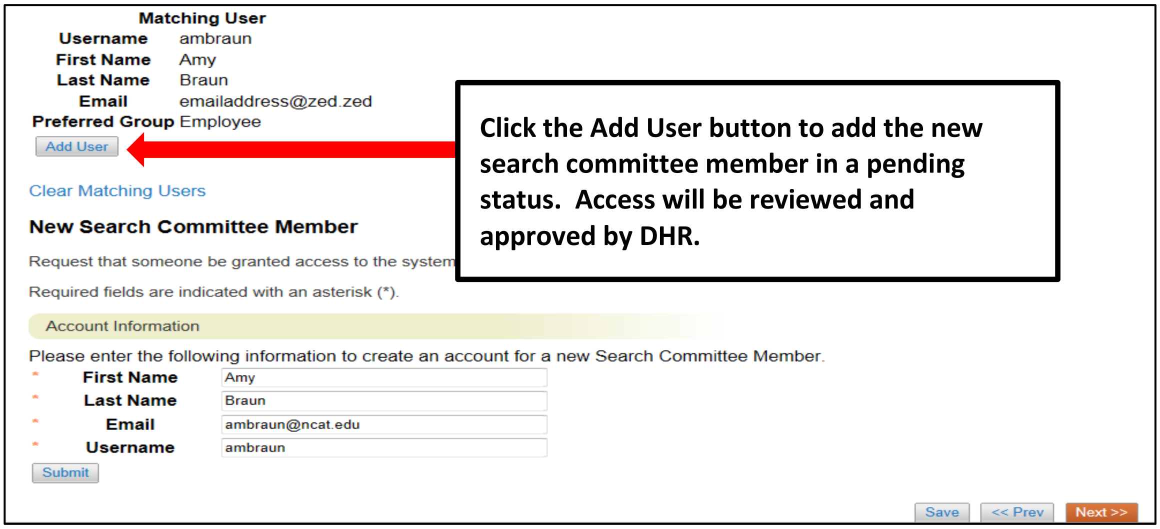
After searching for a pre-approved search committee member, click on the **Add Member** button to add them to your search committee. You can also make a search committee member the chair of the search committee by clicking on the check box next to **"Make Member the Committee Chair"**:



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:

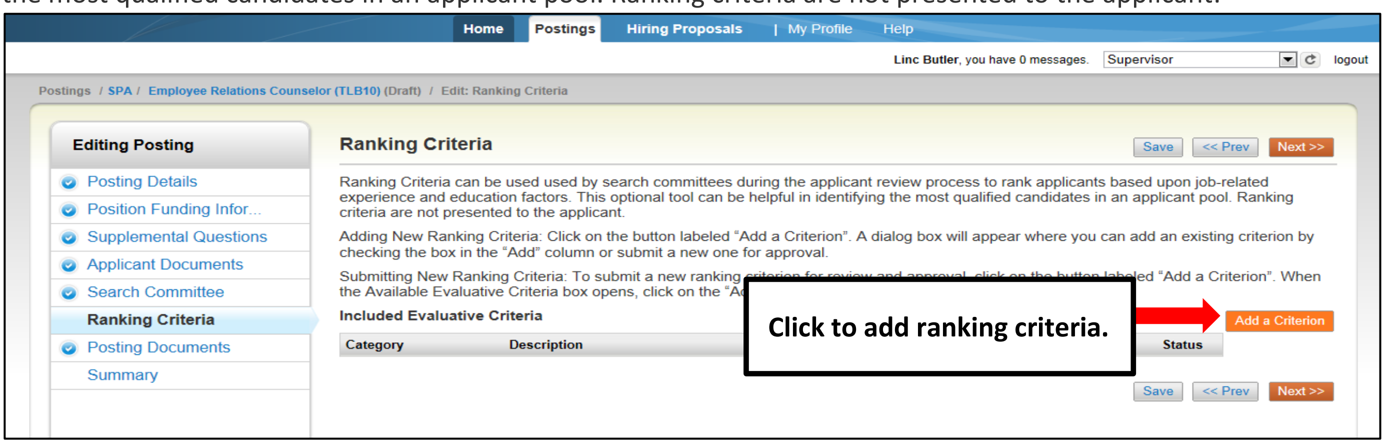


If the requested search committee member is already an assigned user of the PeopleAdmin system, their user account information will be displayed, and you can add them to your search committee by clicking on the **Add User** button:

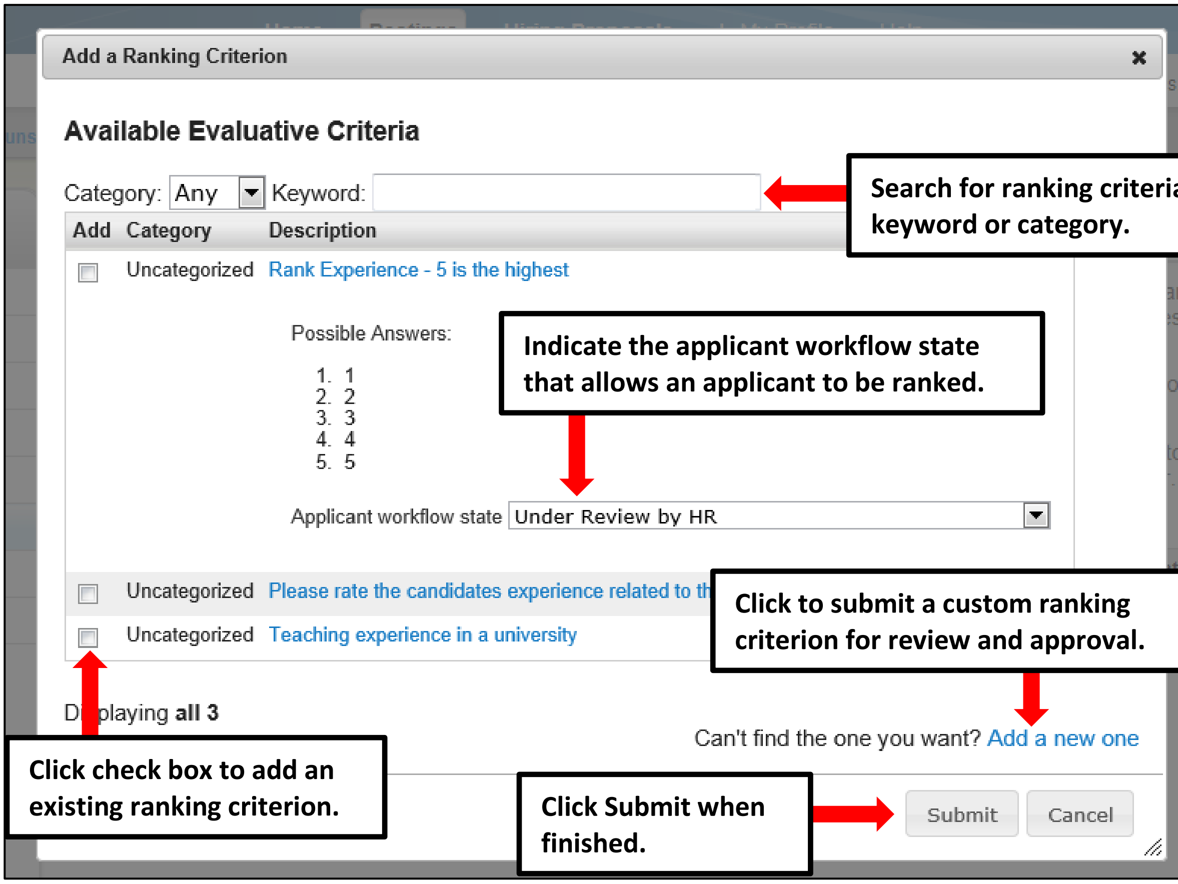


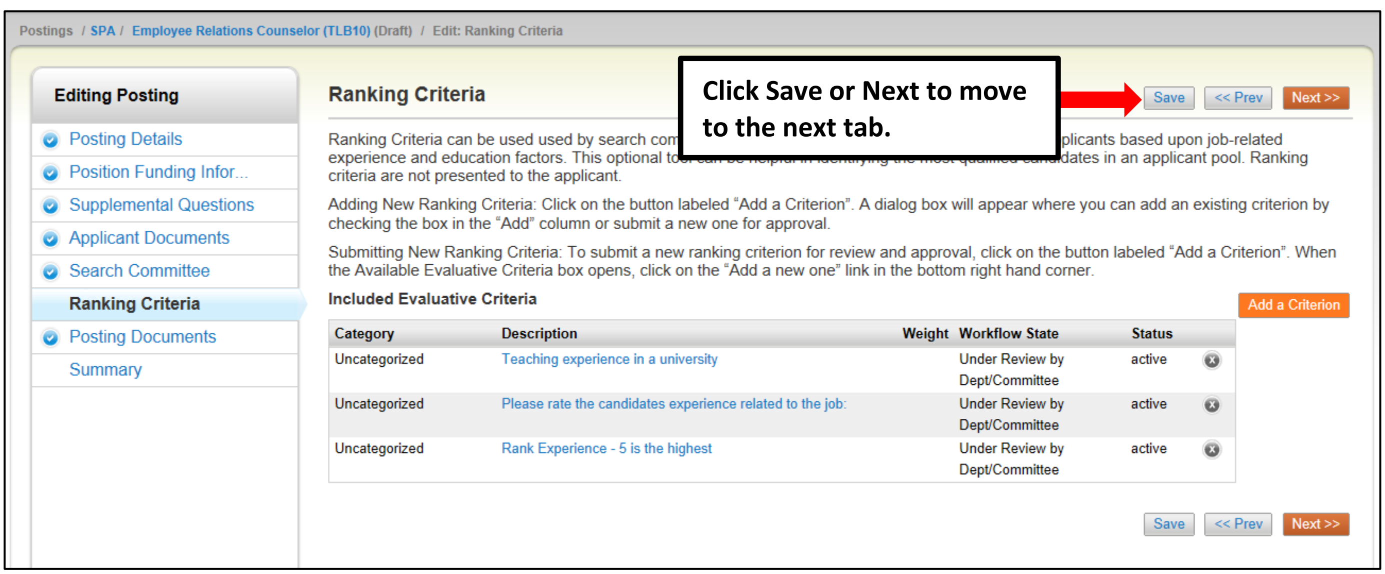
Create New SHRA Posting from a Position Description – Ranking Criteria Tab

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:



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:



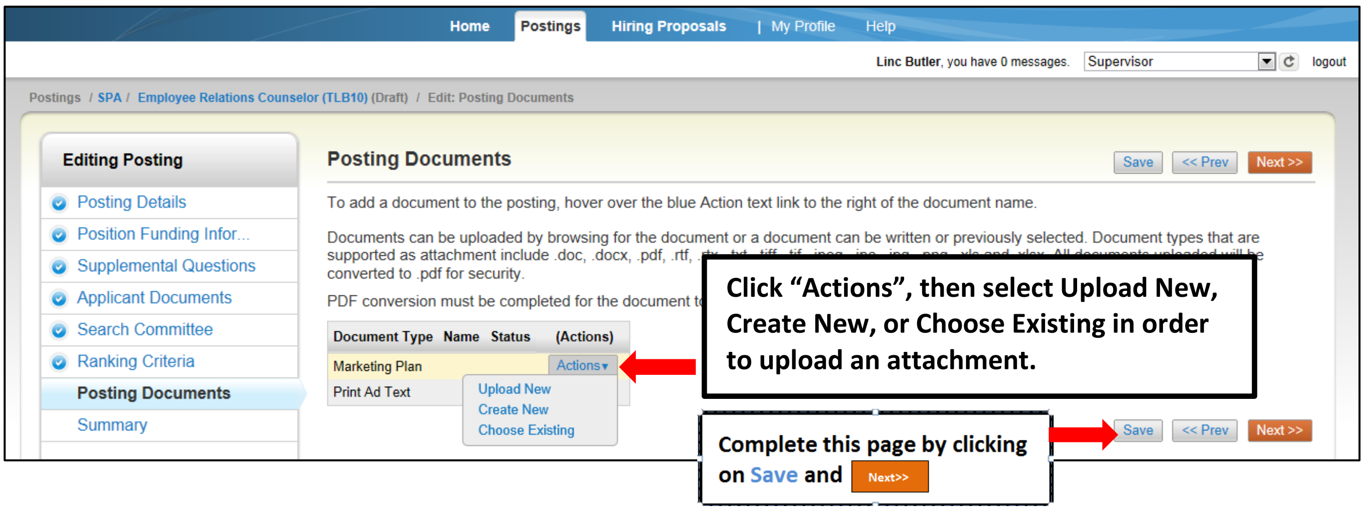


Create New SHRA Posting from a Position Description – Posting Documents Tab

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.

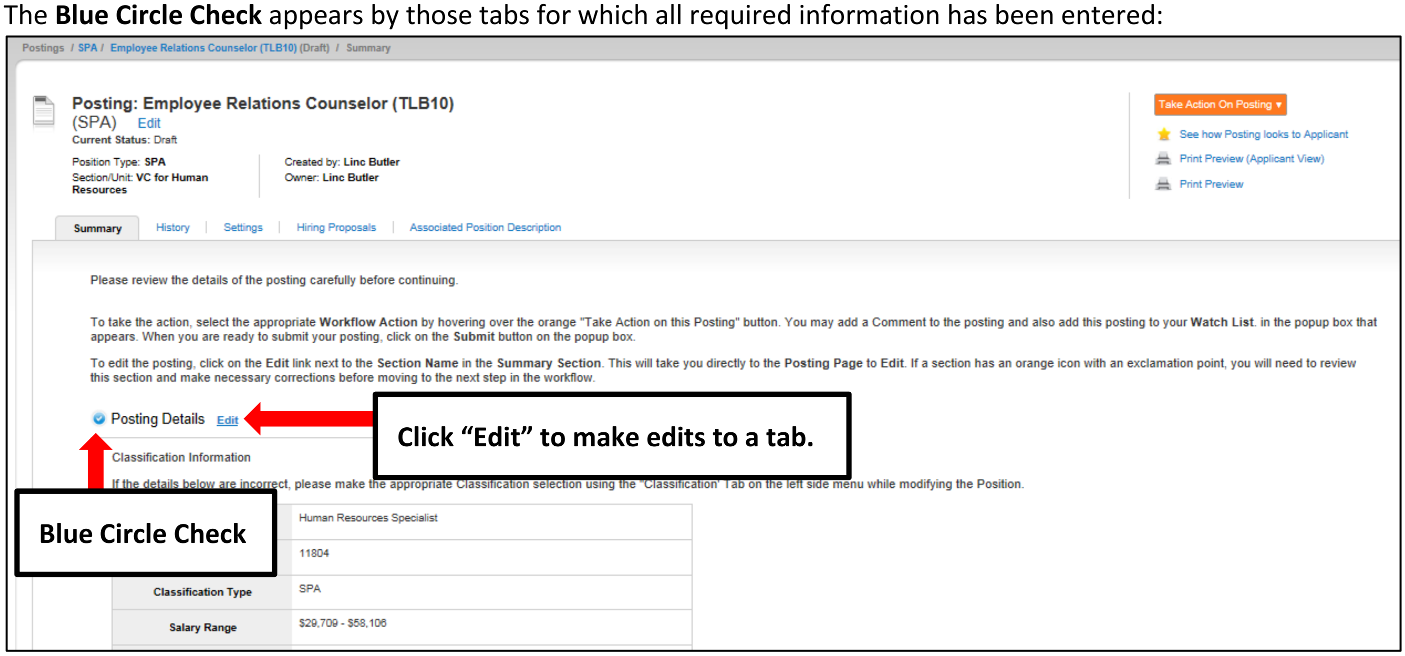
Excel and Word documents may be attached. PDF conversion must be completed for the document to be valid when applicable:



Create New SHRA Posting from a Position Description – Summary Tab

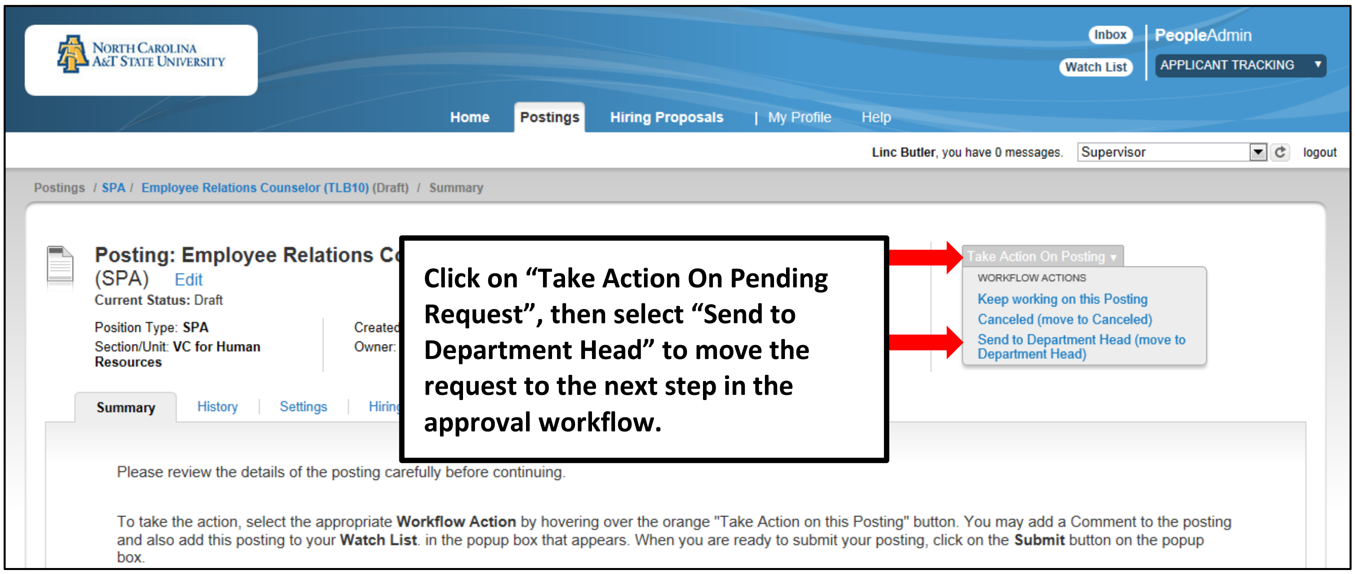
The **Summary Tab** allows you to perform a final review all of the posting information you've entered on the previous tabs prior to sending the request to the next step in the approval workflow. Please review the details of the posting summary carefully before continuing.

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

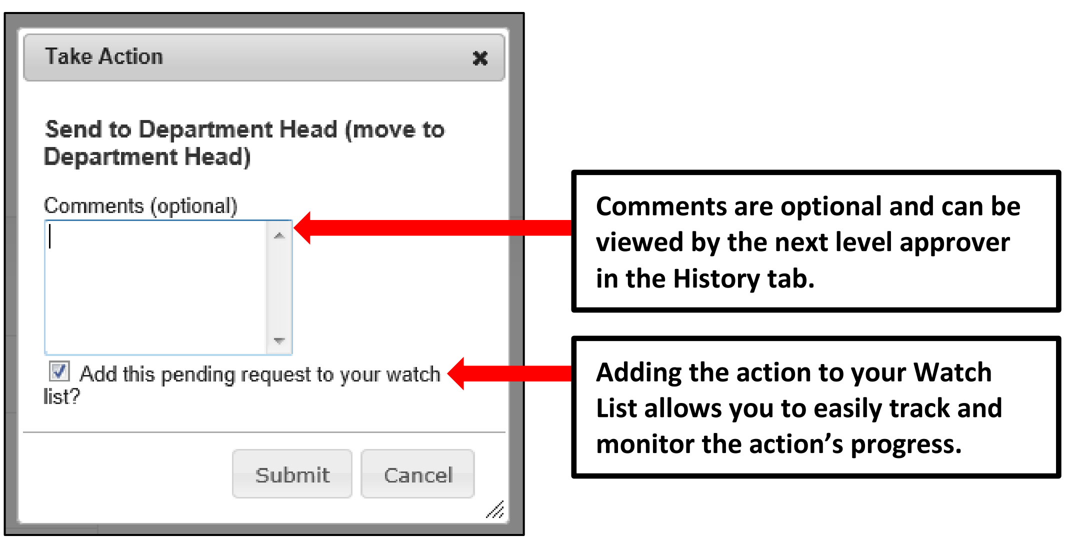


An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save",** and then return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

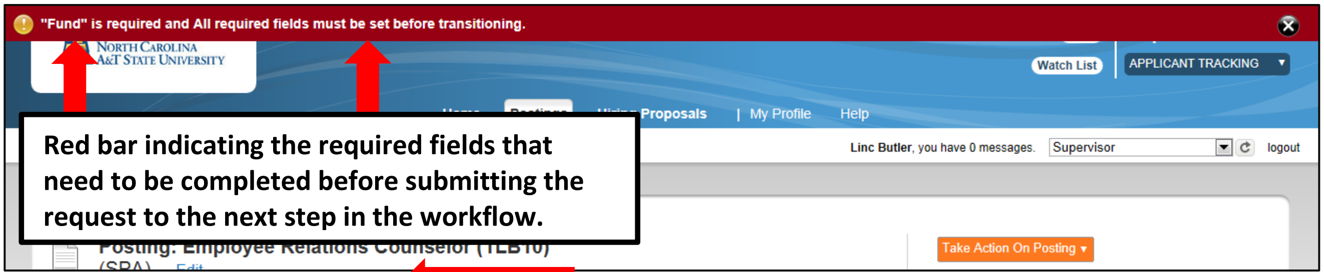
Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example,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



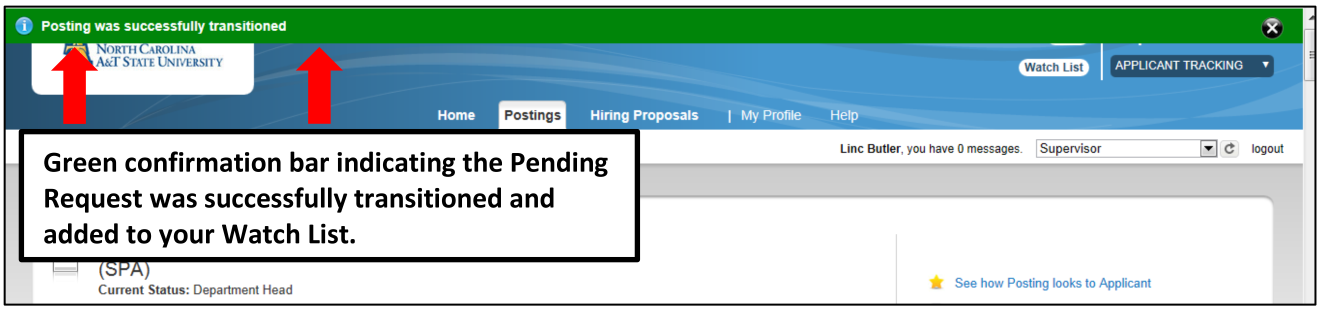
You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send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



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

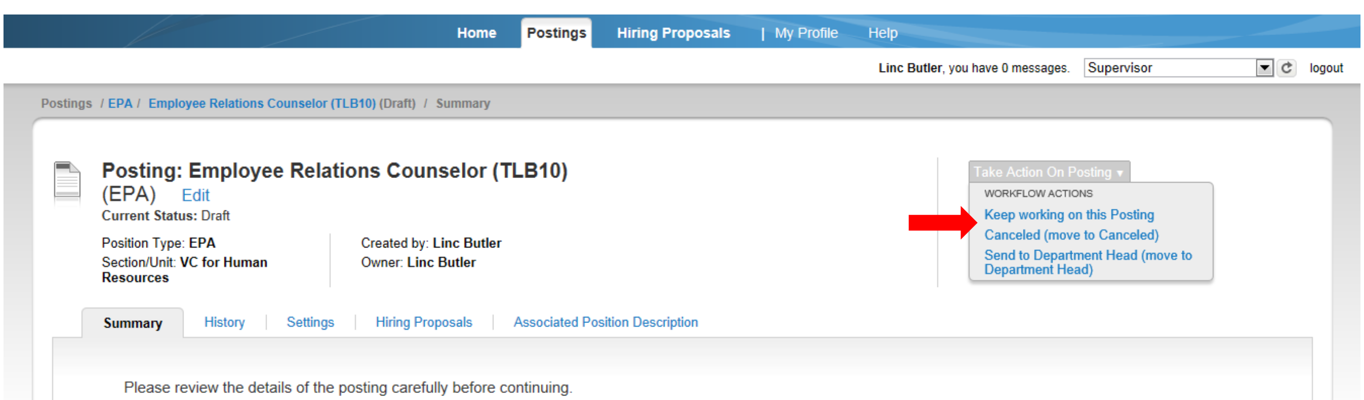


The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if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

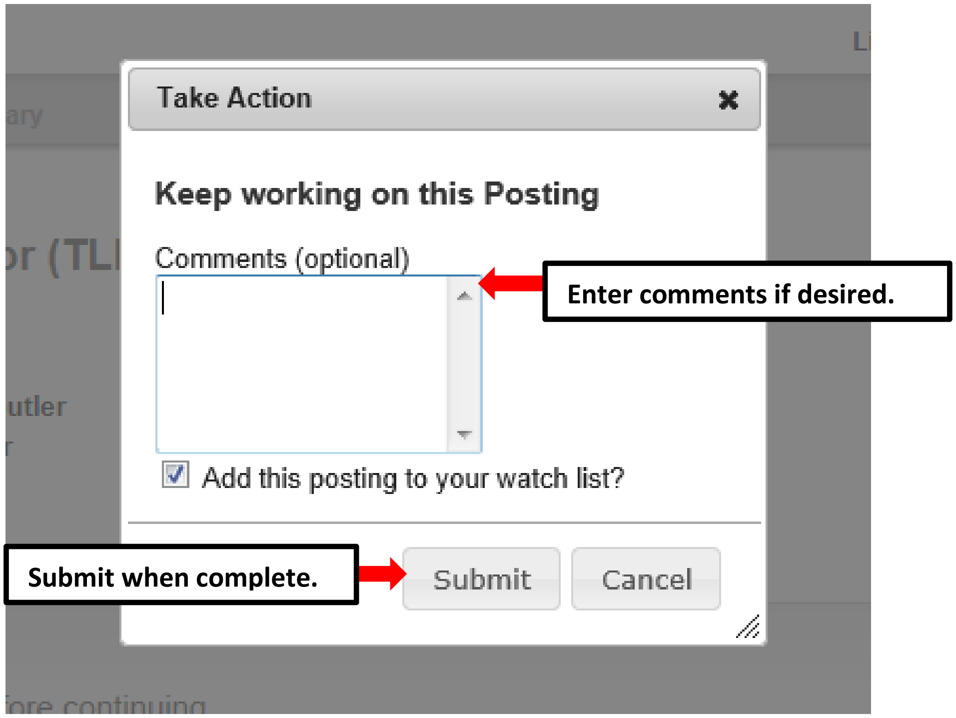
Create New SHRA Posting from a Position Description - Saving to Return to a Pending Request Later

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"



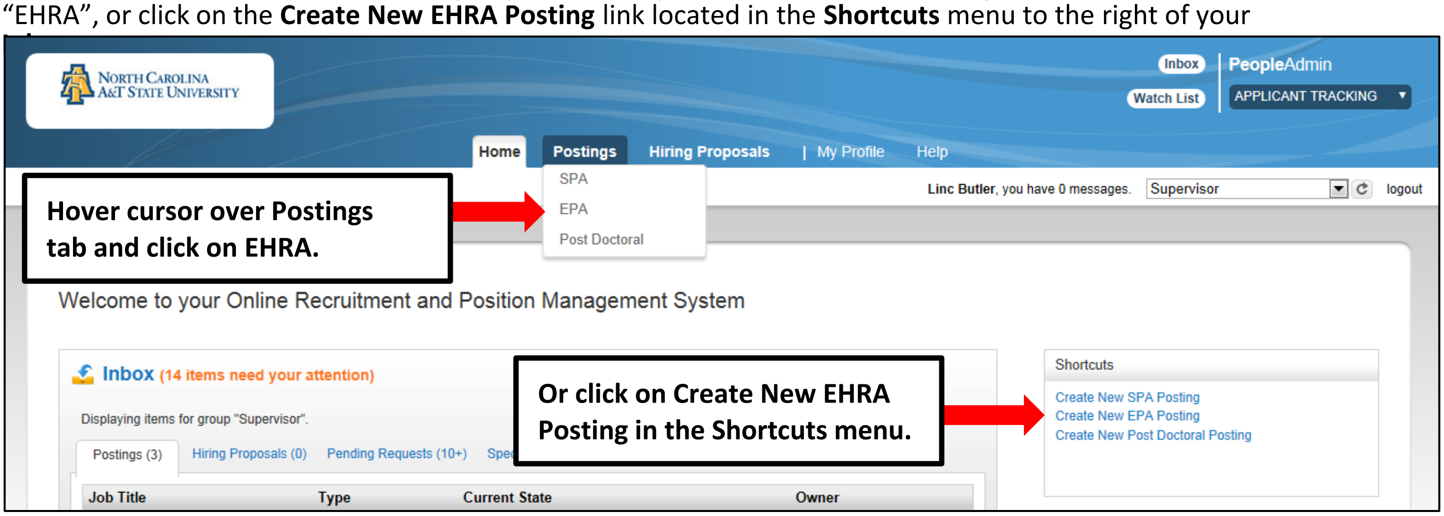
4) Add any Comments into the window that opens (below) as notes to yourself, if desired.
5) Click "Submit"



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

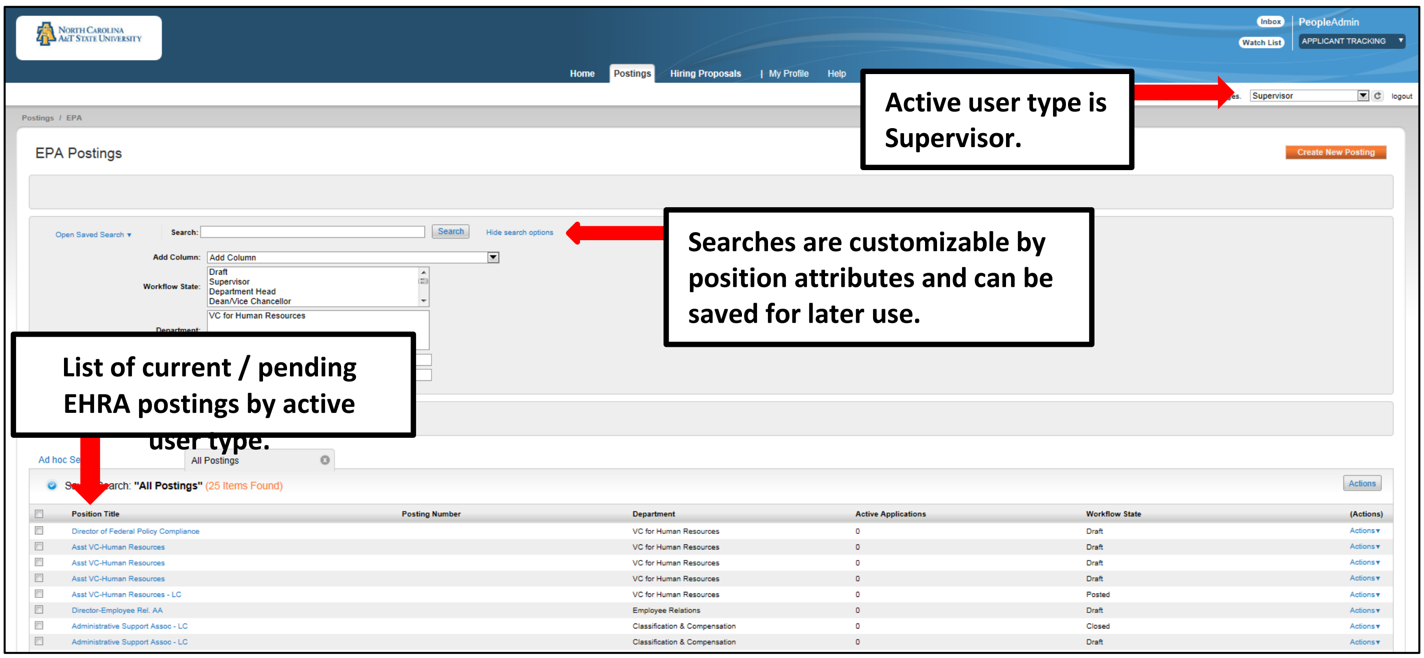
To initiate a **Create New EHRA Posting** request, hover your cursor over the **Postings** tab and click on "EHRA", or click on the **Create New EHRA Posting** link located in the **Shortcuts** menu to the right of your



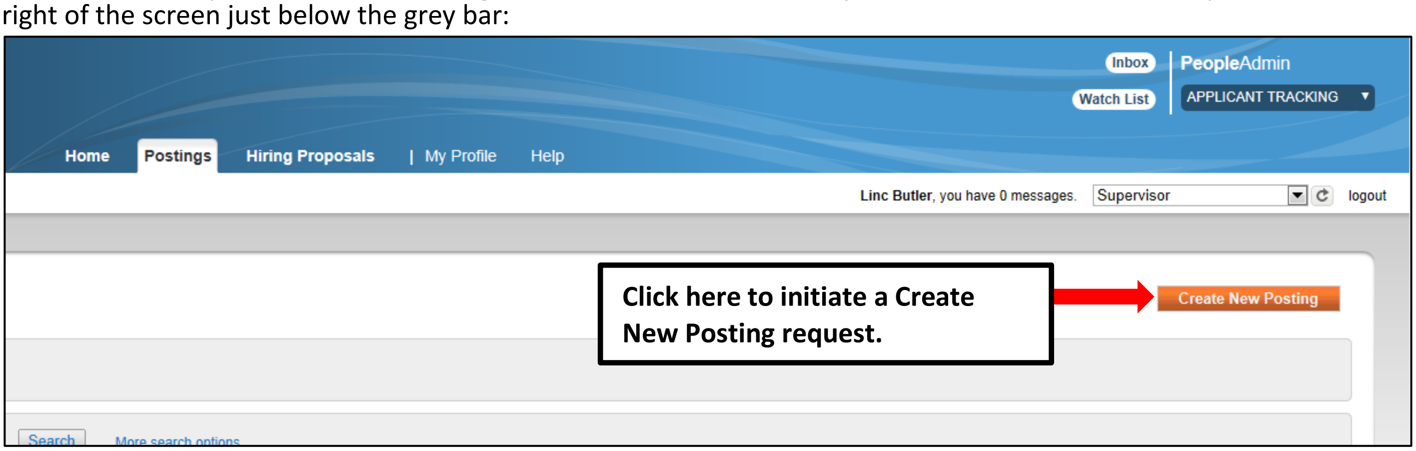
You will then be taken to the **EHRA Postings** view, which provides a list of all current/pending EHRA postings initiated based on your active user type as follows:

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.

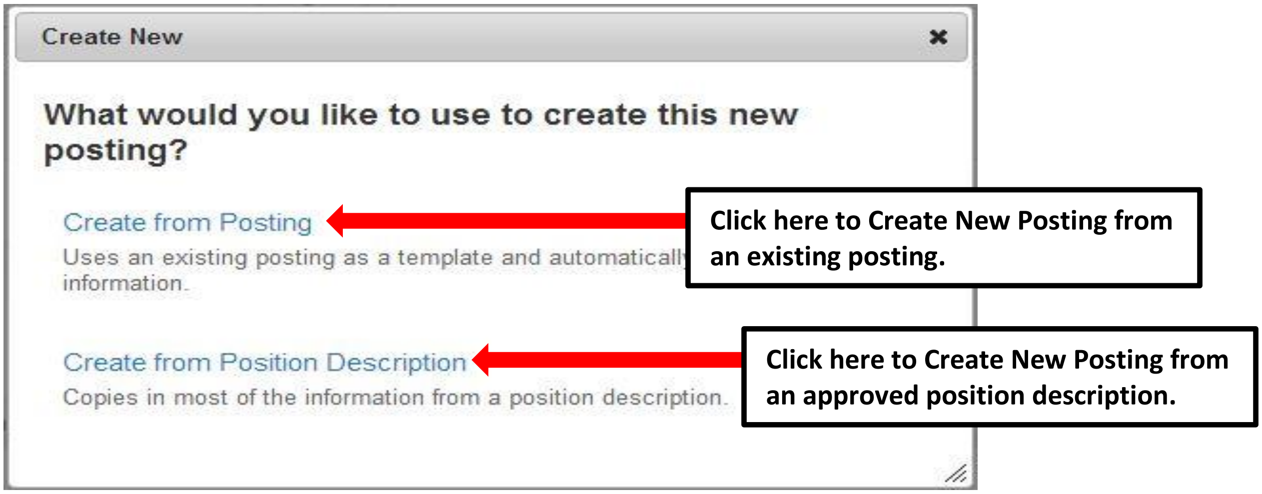
In the **EHRA Postings** view, you can search postings by any number of criteria, including but not limited to position title, posting number, position number, department name, supervisor name, or workflow state. Searches are fully customizable by position and posting attributes, and you can save custom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



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:



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

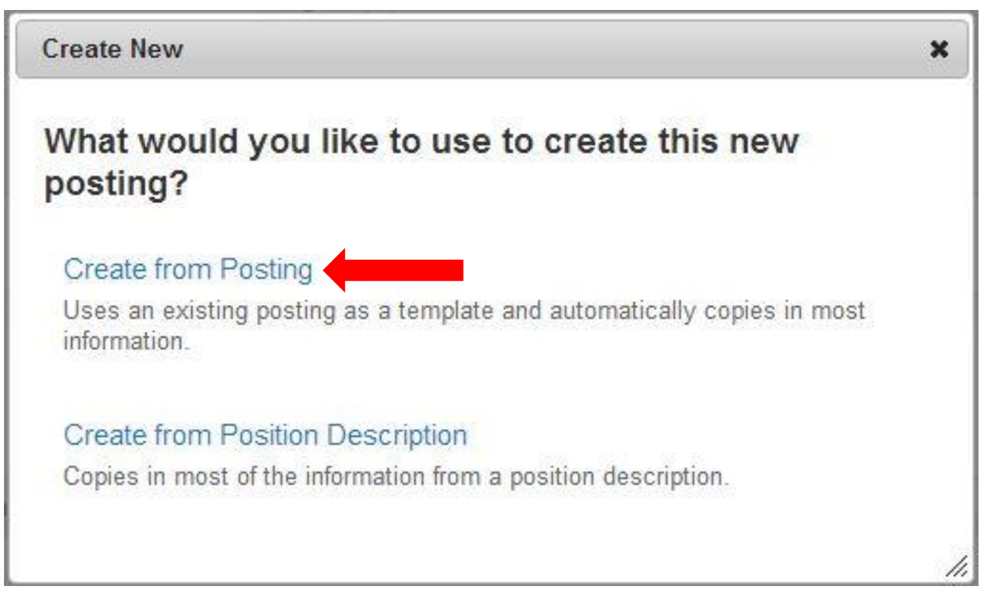


Create New EHRA Posting – Create from Posting

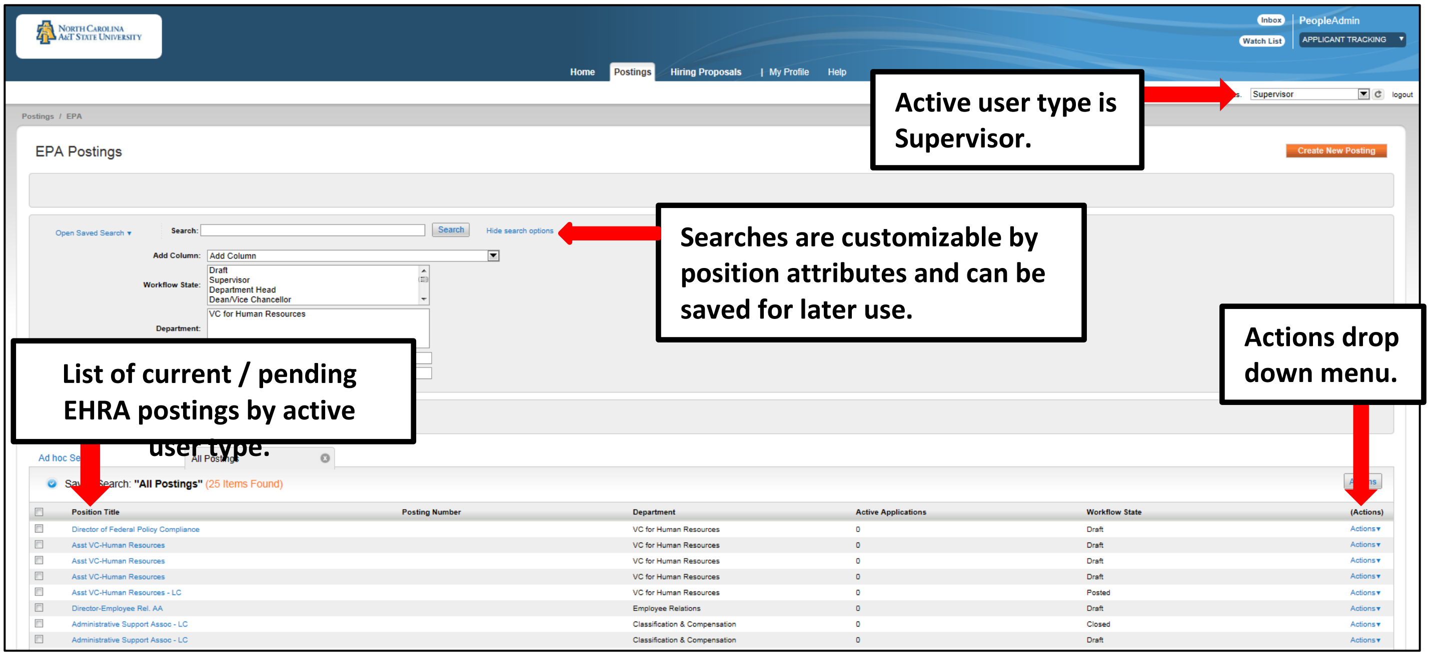
Select **Create from Posting** if you have previously posted a position in the PeopleAdmin system and wish to post a position using the same or similar information from that prior posting.

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.

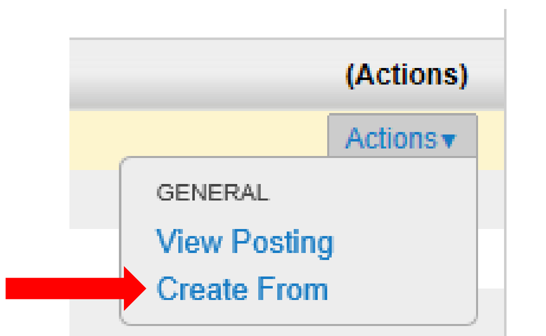
Choosing the **Create from Posting** option copies information from an existing posting into a new posting:



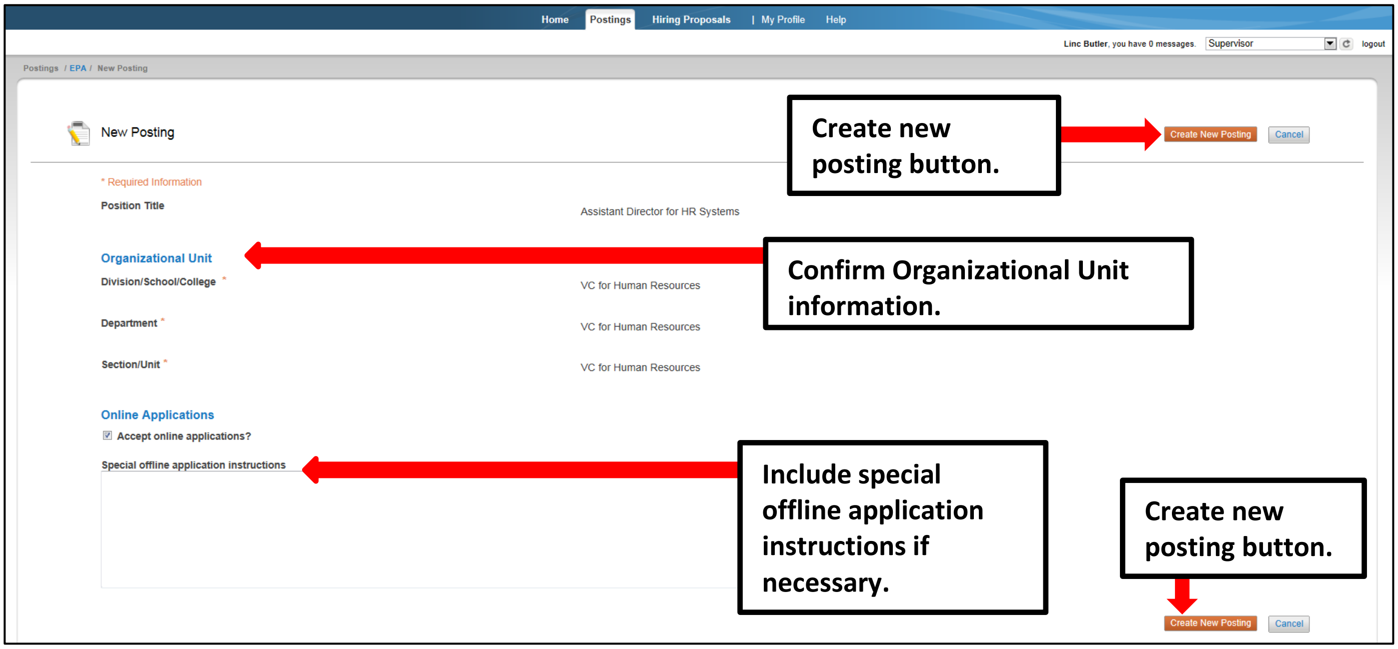
After clicking on **Create from Posting,** you will be taken to the **EHRA Postings** view, where you can search postings by any number of criteria, including but not limited to position title, posting number, position number, department name, supervisor name, or workflow state. Searches are fully customizable 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 Recruitment Coordinator in the Division of Human Resources:



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:

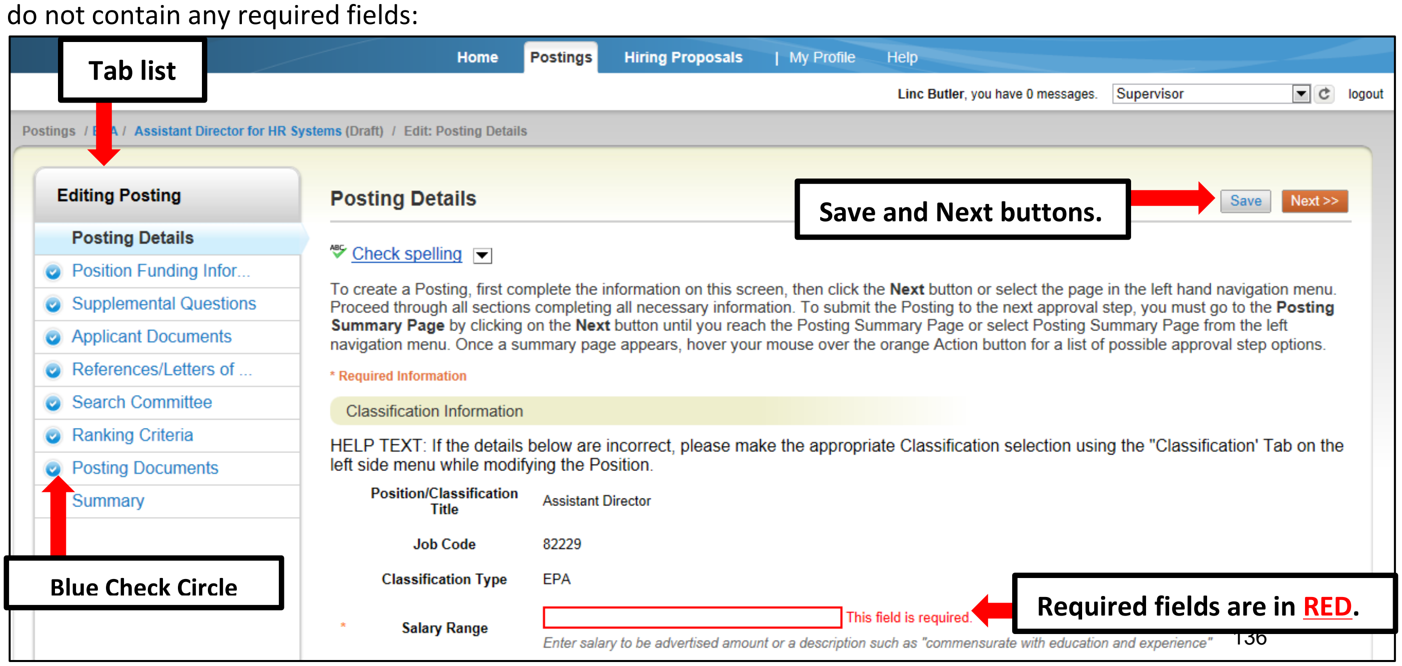


Create New EHRA Posting from an Existing Posting – Edit Posting

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 **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 all other tabs will appear as blue links.

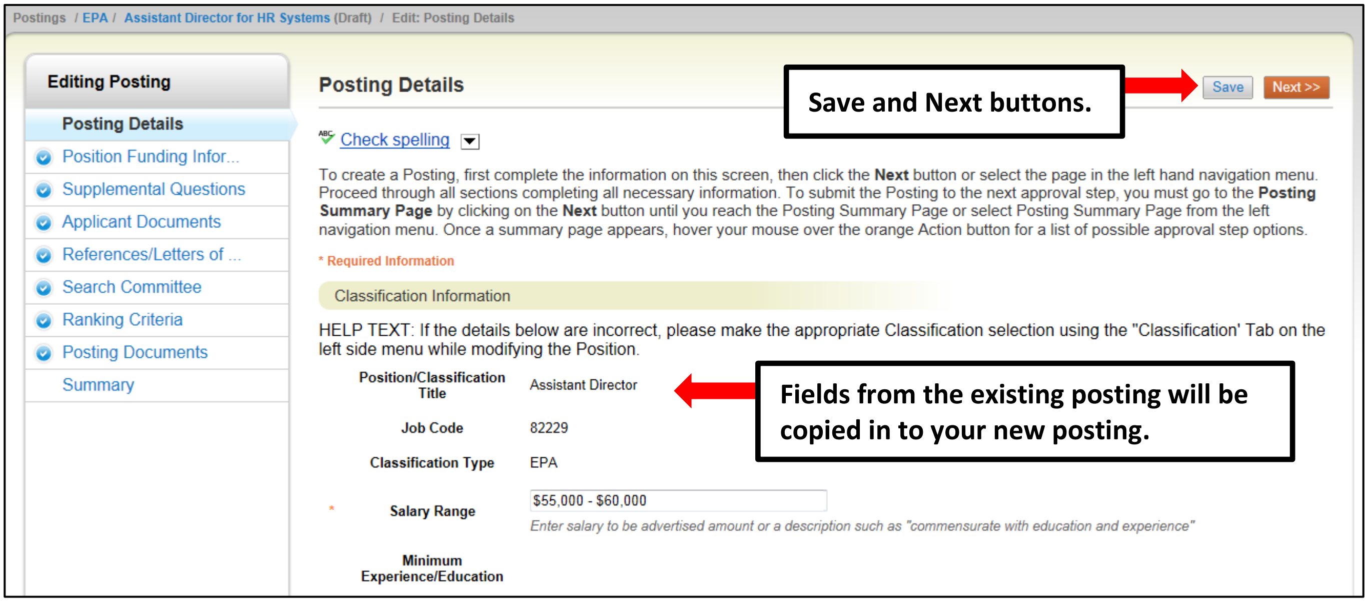
You can save the changes you've made to the active tab you're working on and navigate to the next tab in the list simultaneously by clicking the Next >> button located in both the top and bottom right corners of the page. You can save the active tab you're working on and stay on the same tab by clicking 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.

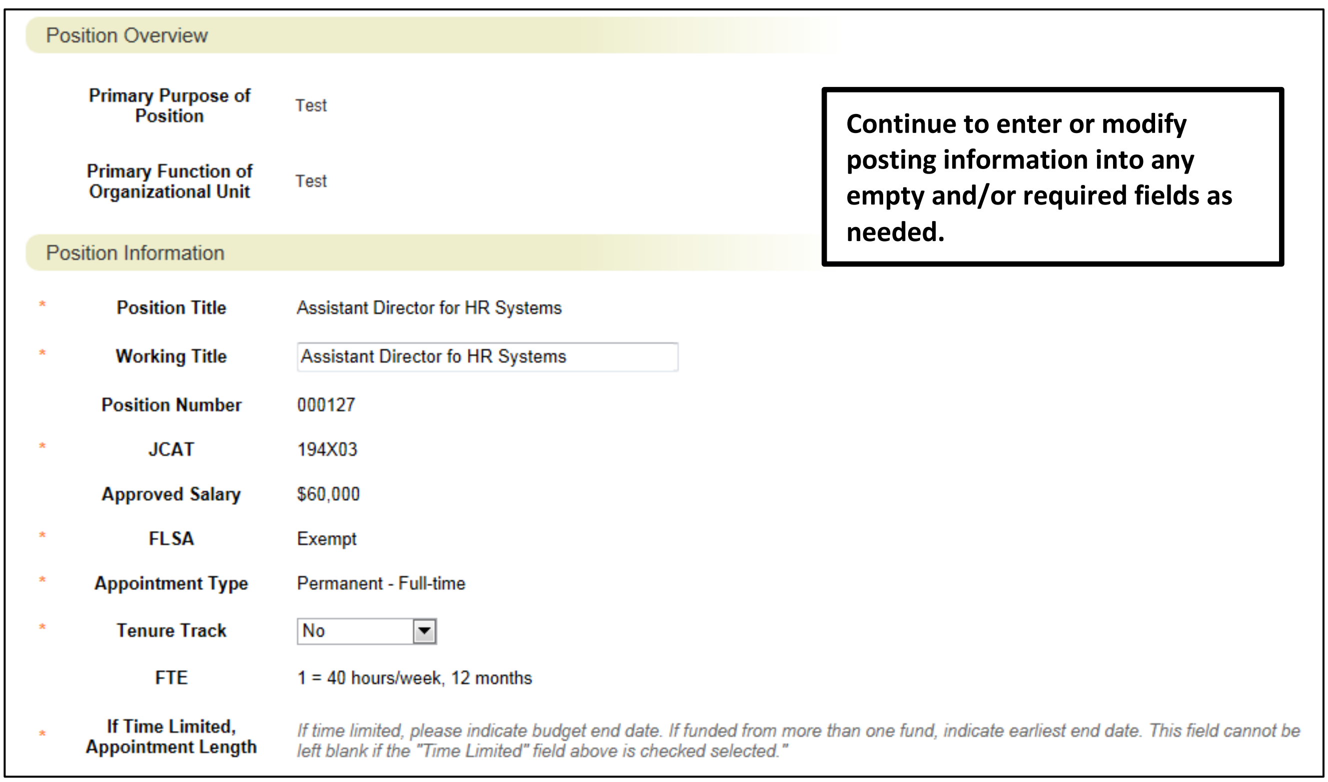
Required fields are highlighted in **red** and must be filled in before the new **EHRA Posting** can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check Circle**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



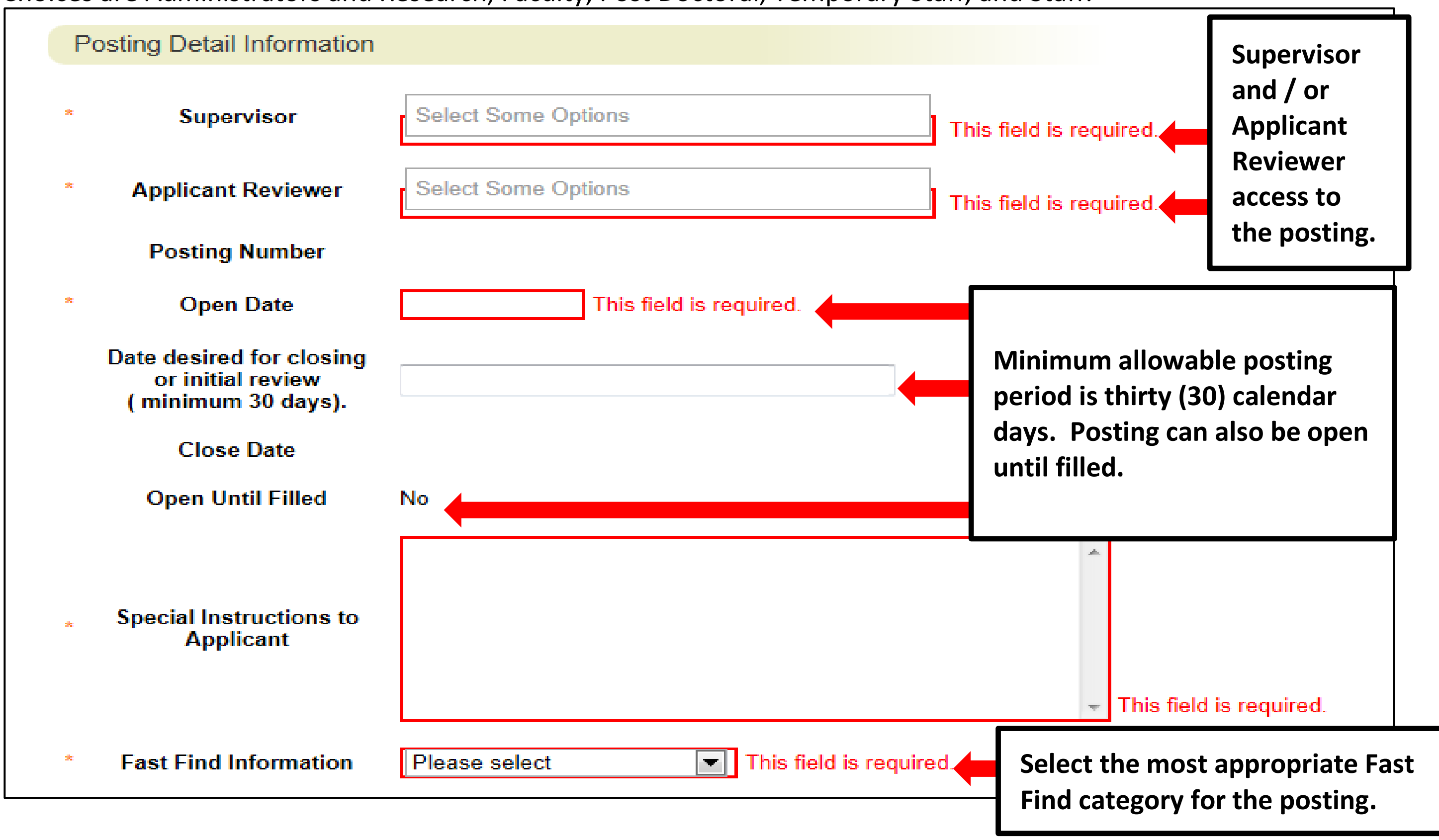
Create New EHRA Posting from an Existing Posting – Posting Details Tab

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, then Next >> the button to save changes and navigate to the next tab:

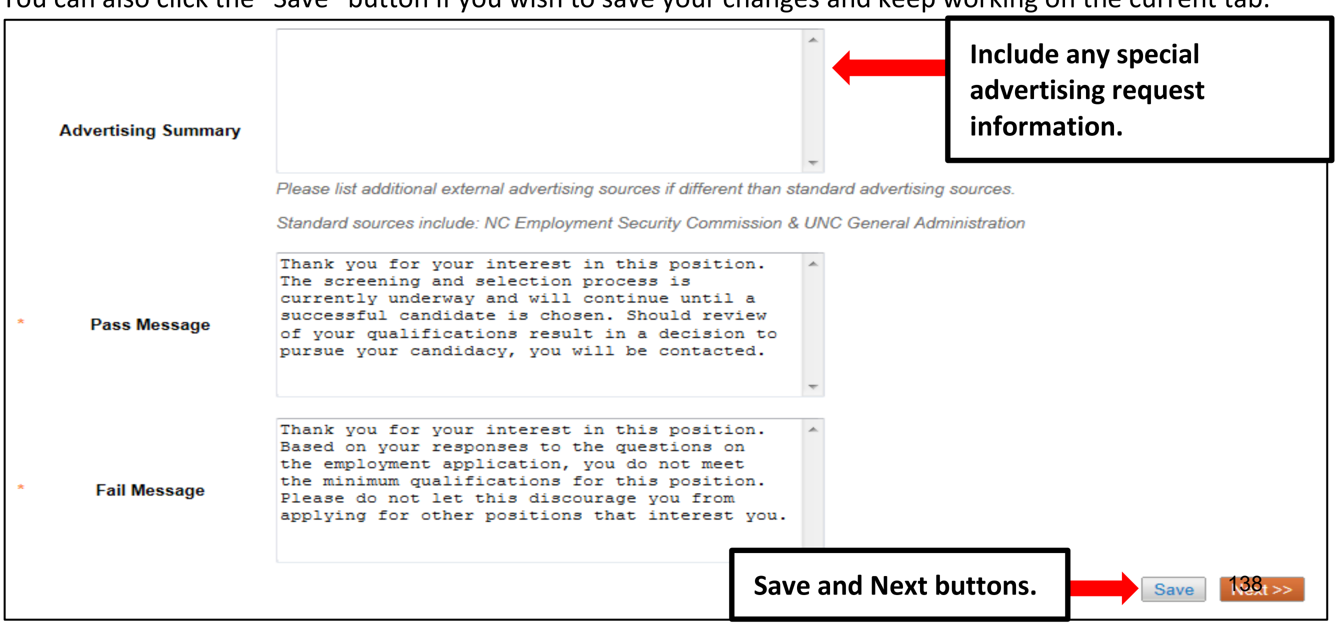




You can indicate other users you would like to have **Supervisor** and / or **Applicant Reviewer** access to the posting by searching for their name in the Supervisor and Applicant Reviewer fields. Indicate the proposed **Open Date** and **Date Desired for Closing or Initial Review (minimum 30 days)**, 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:

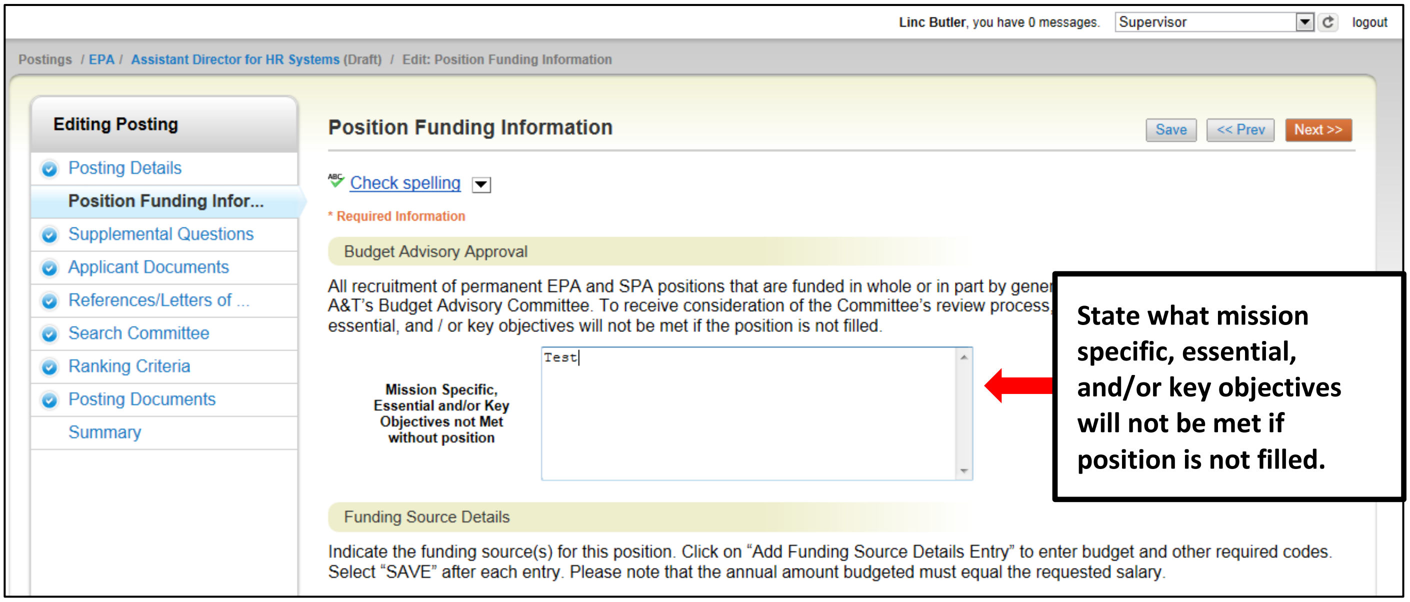


Include details regarding any special advertising requests, such as posting the position on additional job posting websites or in specific print media outlets, in the **Advertising Summary** field. A link to the job posting on the North Carolina A&T State University applicant portal will be included 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.



Create New EHRA Posting from an Existing Posting – Position Funding Information Tab

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:



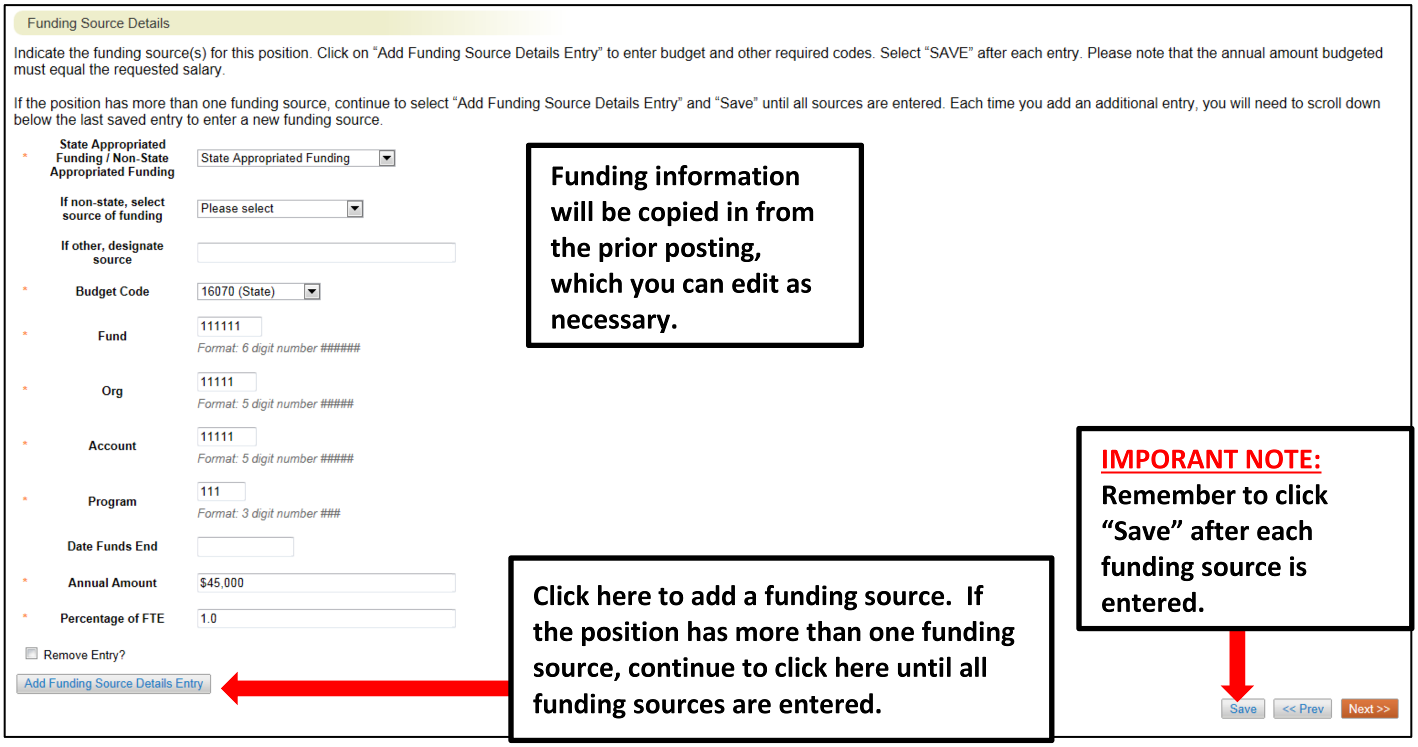
Funding Source information from the prior posting will copy over into the fields in the Funding Source Details section of this tab, and you can make edits as necessary. **PLEASE NOTE:** The annual amount budgeted must support the hiring range indicated on the Posting Details Tab.

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

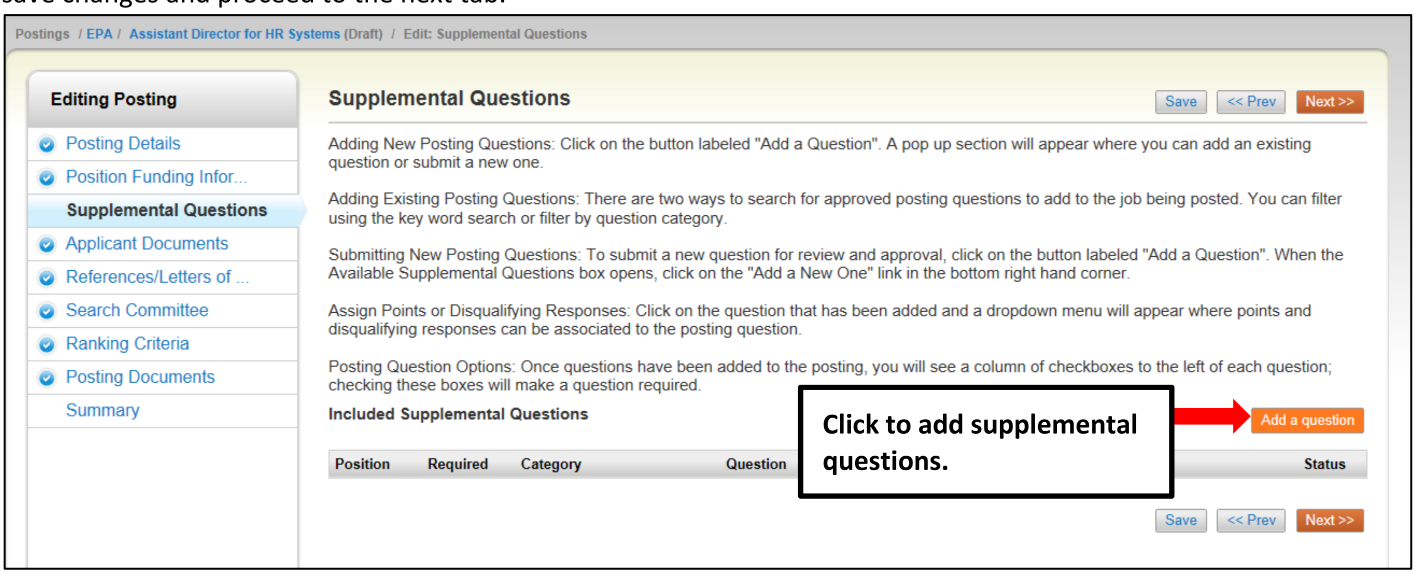
These forms show listings of all active funds. For additional help, refer to the Banner Training Guide.

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:



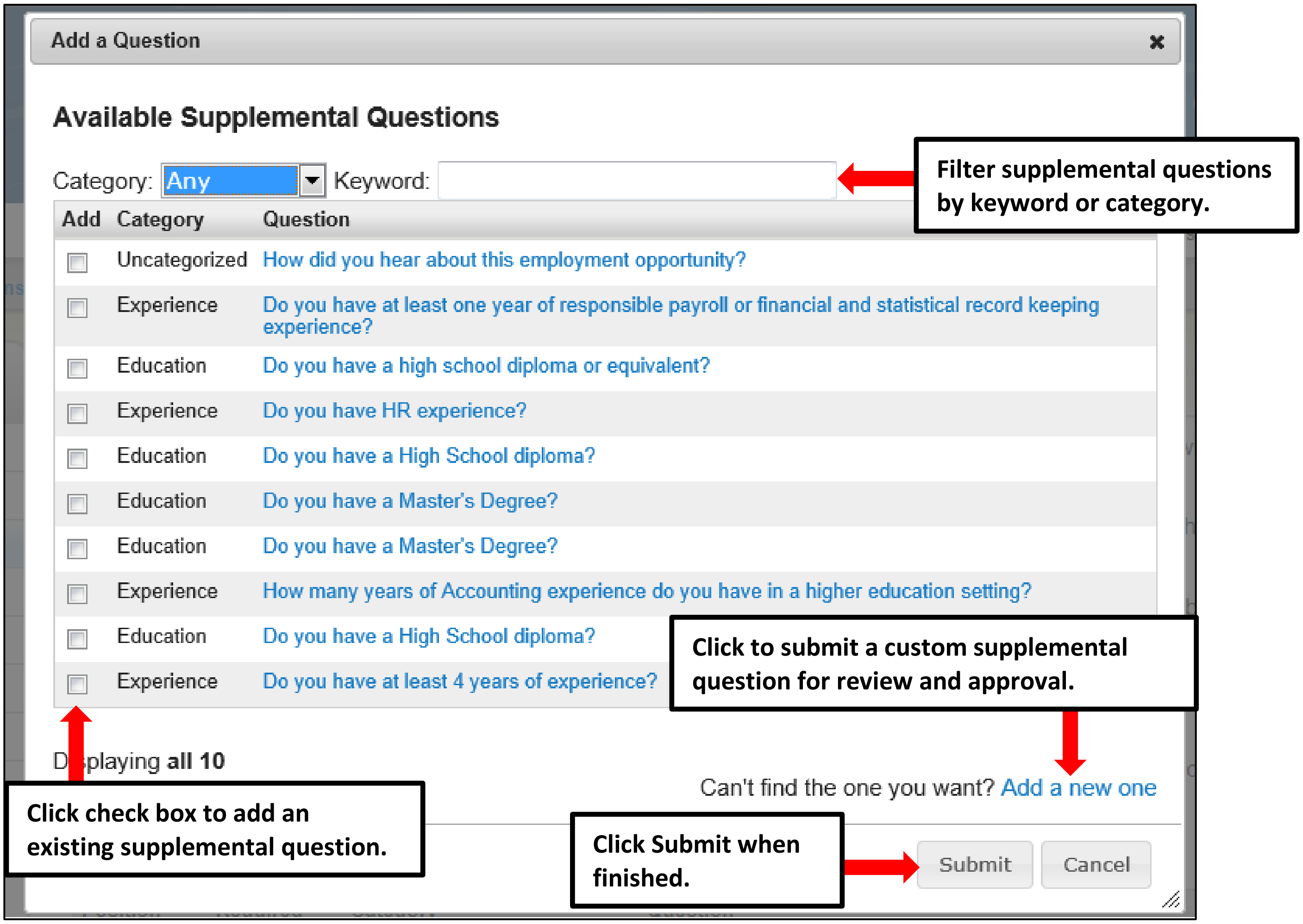
Create New EHRA Posting from an Existing Posting – Supplemental Questions Tab

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:



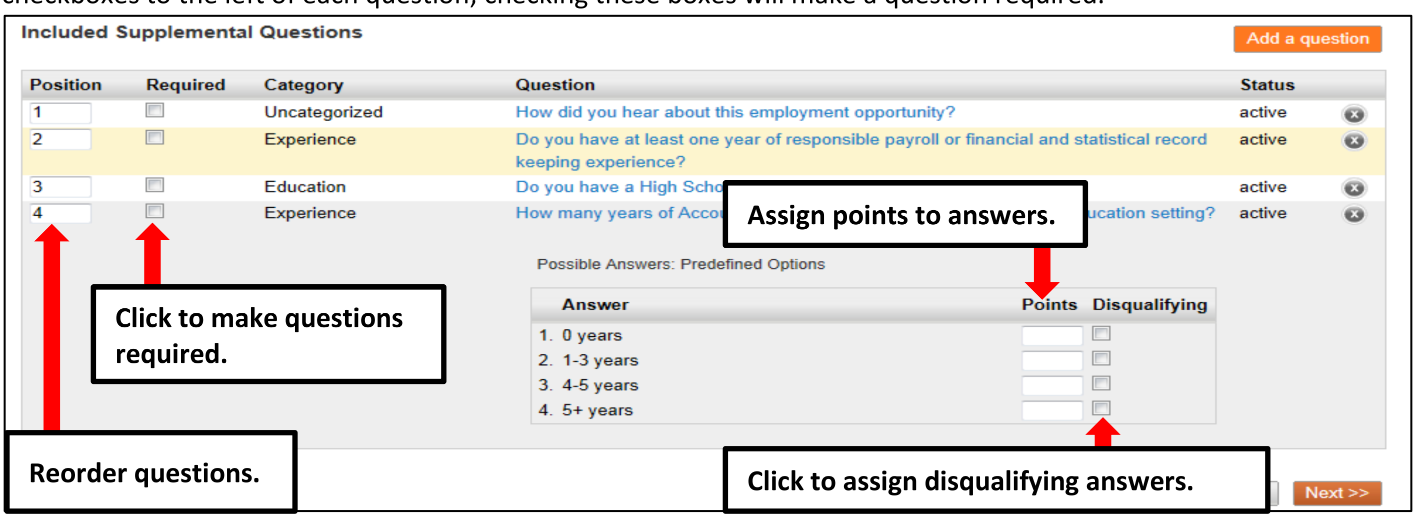
Adding Existing Posting Questions: There are two ways to search for approved posting questions to add to the job being posted. You can filter using the key word search or filter by question category. To add an existing question, click the check box next to the question you wish to add.

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.



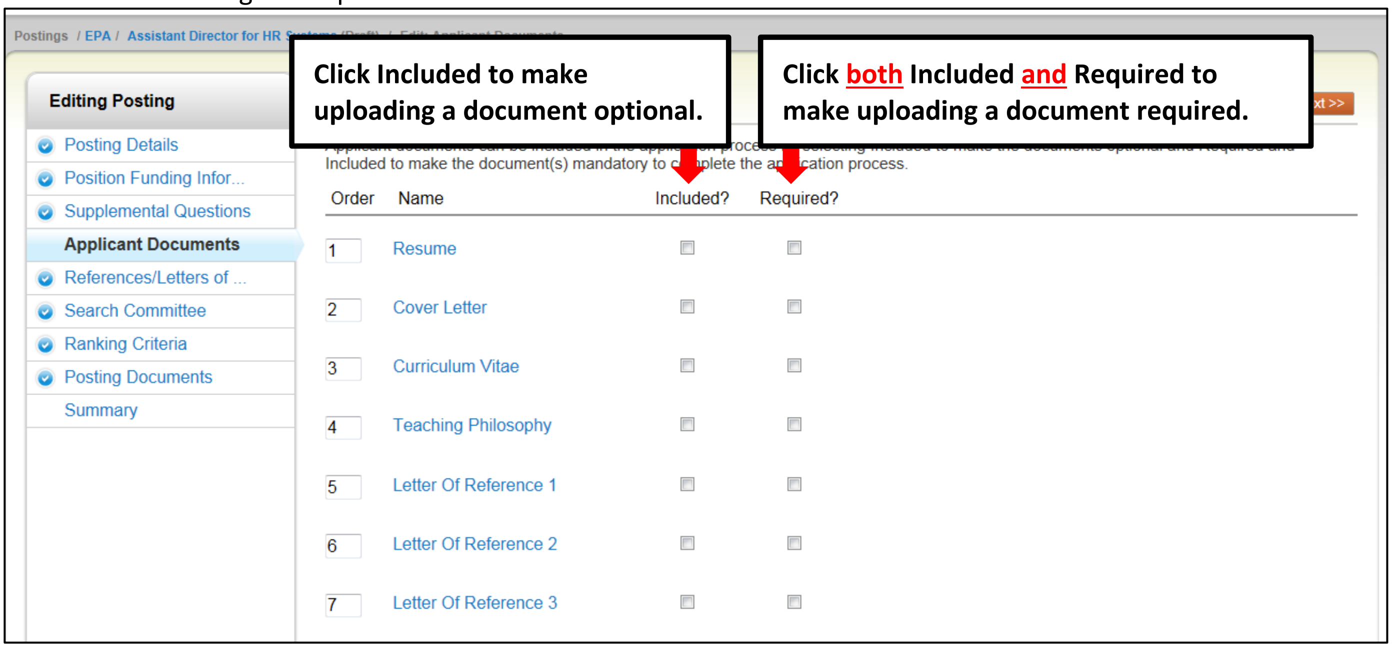
Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear where points and disqualifying responses can be associated to the posting question.

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.



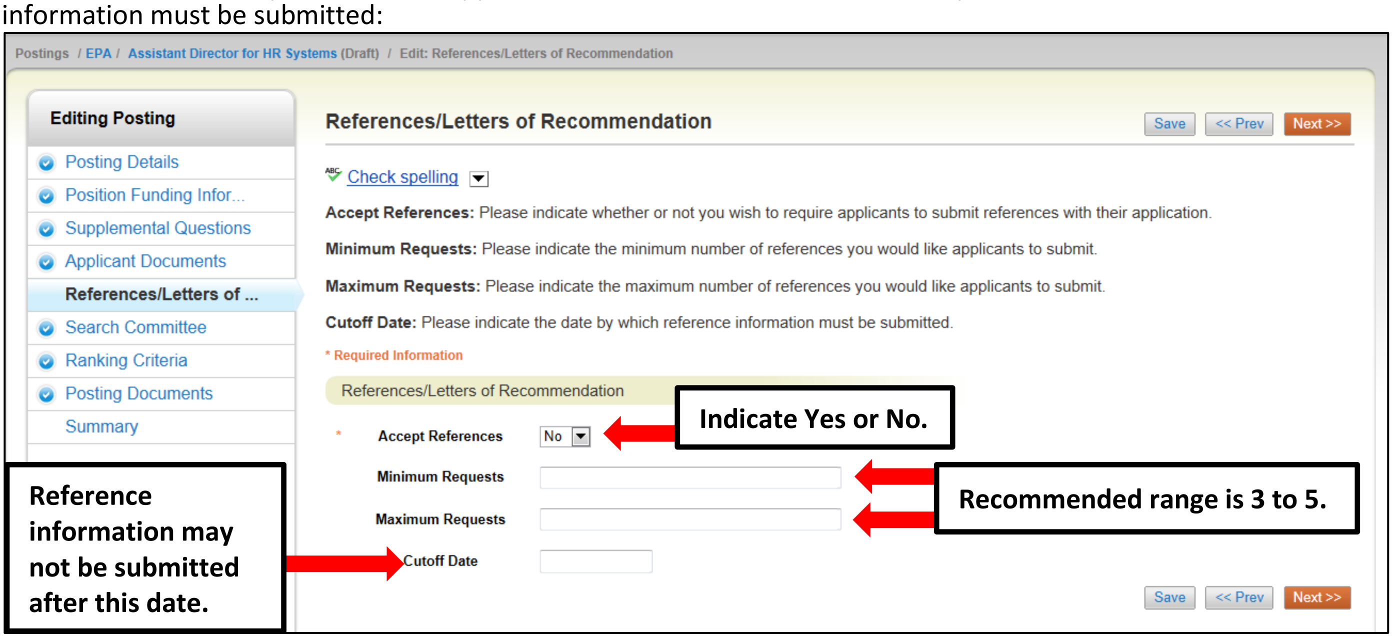
Create New EHRA Posting from an Existing Posting – Applicant Documents Tab

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:



Create New EHRA Posting from an Existing Posting – References / Letters of Recommendation Tab

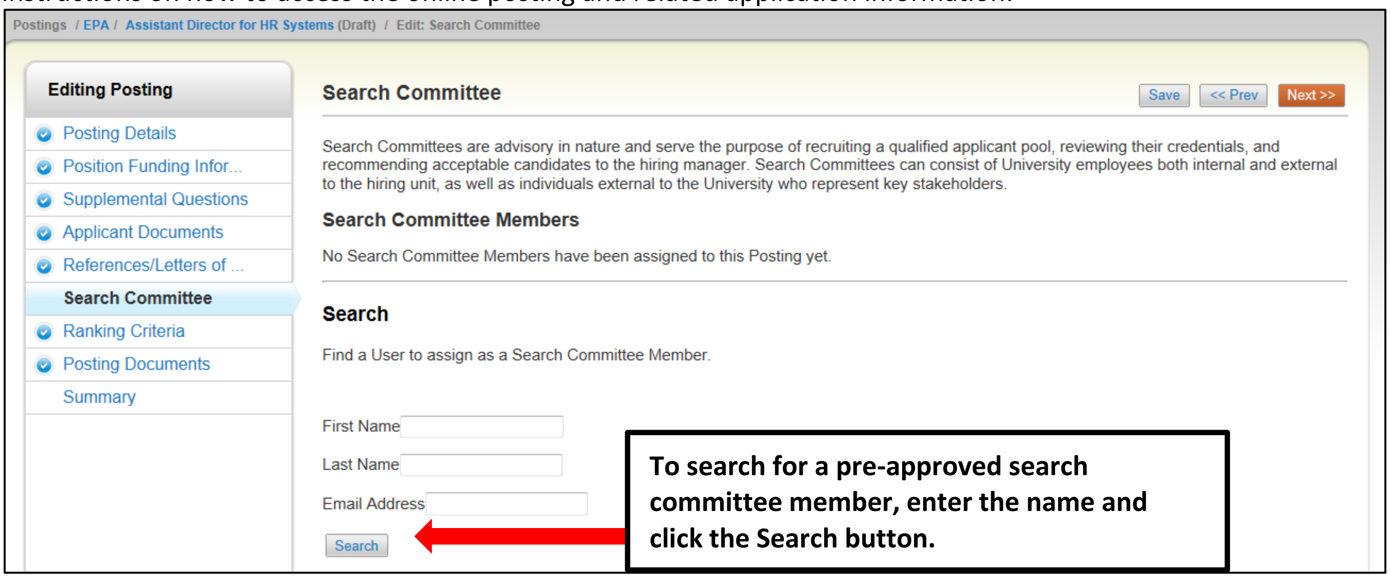
In the **References / Letters of Recommendation** tab, you can indicate whether or not you wish to require applicants to submit references with their application. You can also indicate the minimum and maximum number of references you would like applicants to submit, and the cutoff date by which reference information must be submitted:



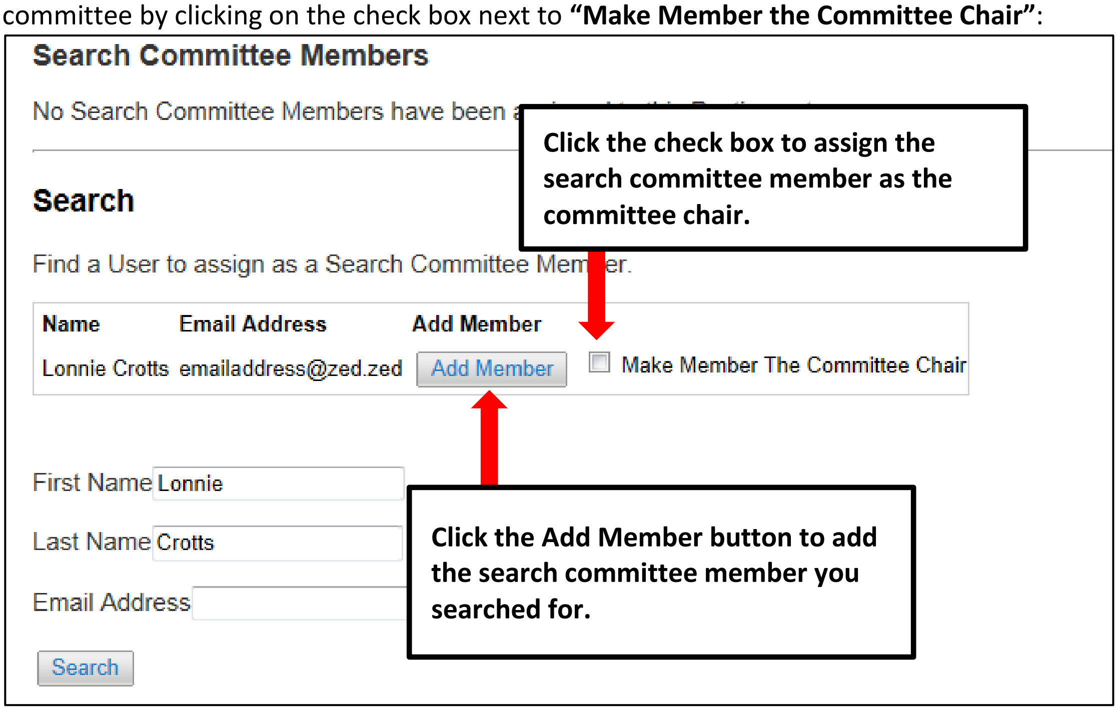
Create New EHRA Posting from an Existing Posting – Search Committee Tab

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.

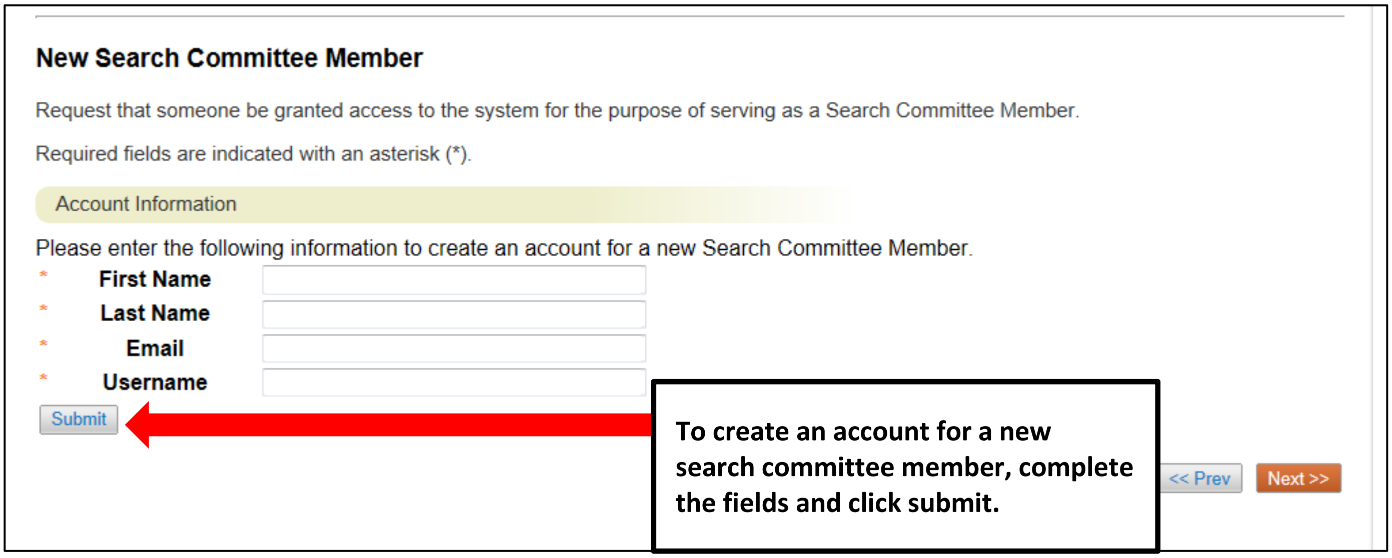
In the **Search Committee** tab, you can assign search committee members who will have access to review application information for a specific posting. Search committee members can view applications, applicant documents, and evaluate / rank applicants based upon ranking criteria you establish as part 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:



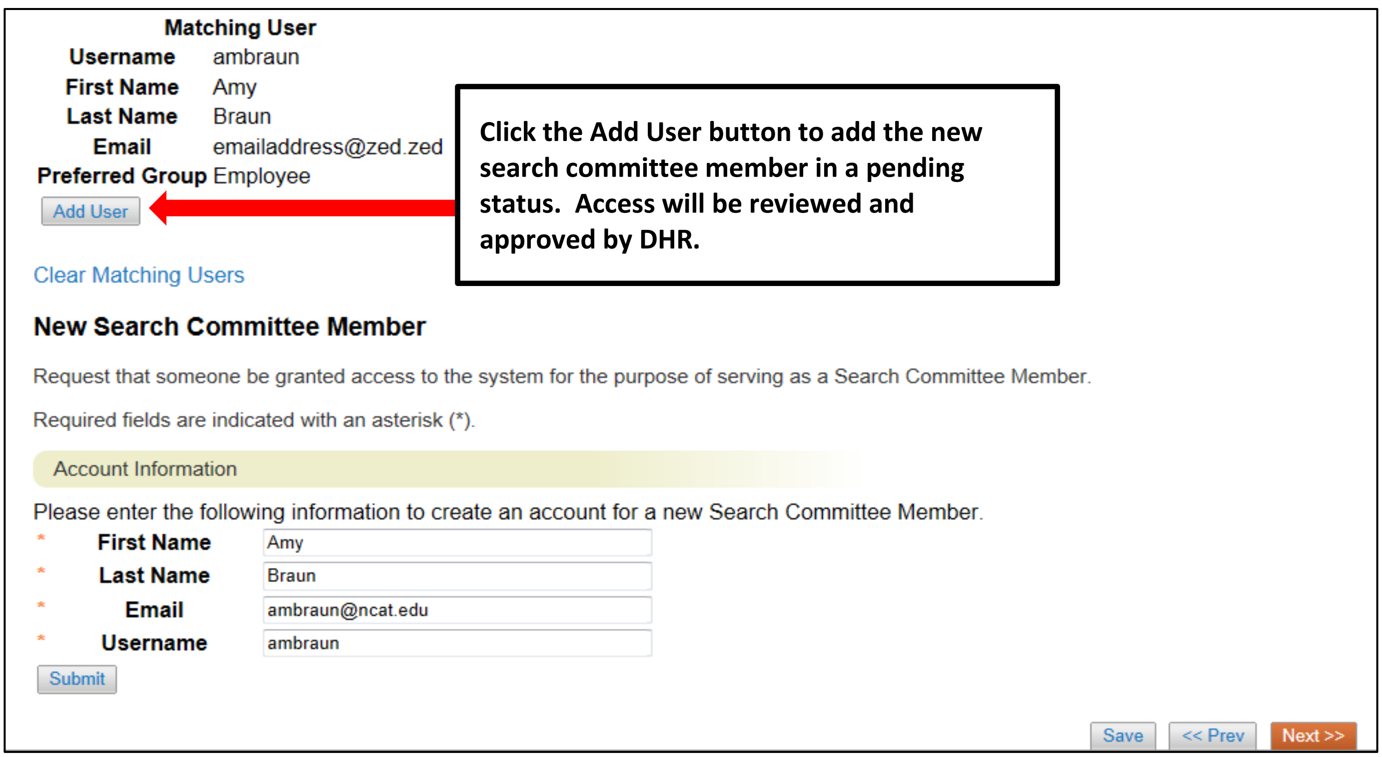
After searching for a pre-approved search committee member, click on the **Add Member** button to add them to your search committee. You can also make a search committee member the chair of the search committee by clicking on the check box next to **"Make Member the Committee Chair"**:



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:

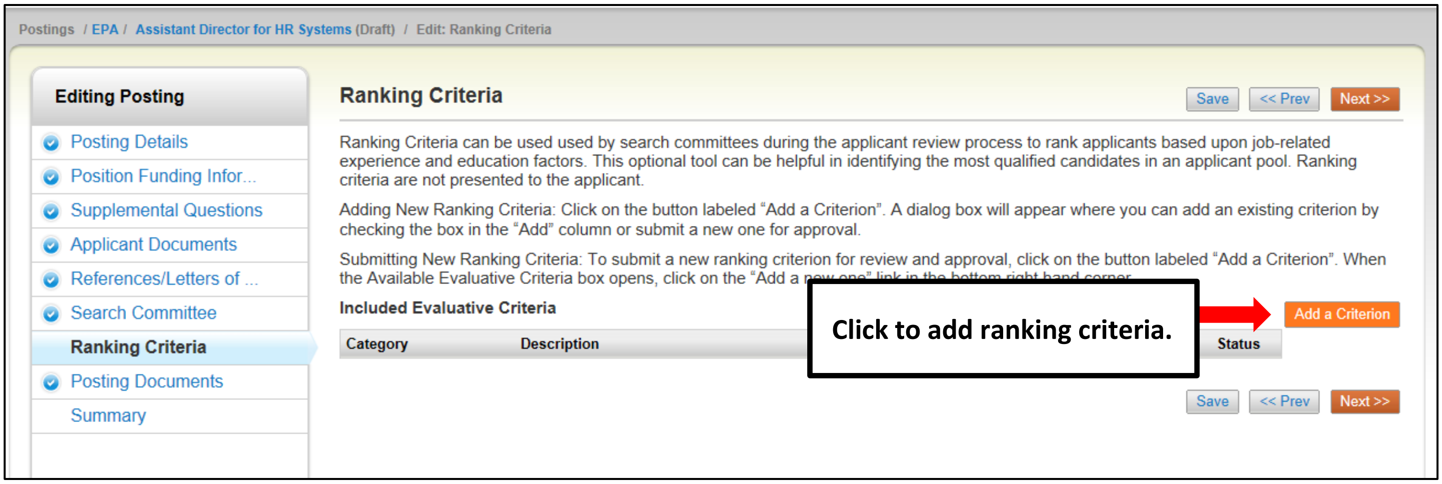


If the requested search committee member is already an assigned user of the PeopleAdmin system, their user account information will be displayed, and you can add them to your search committee by clicking on the **Add User** button:

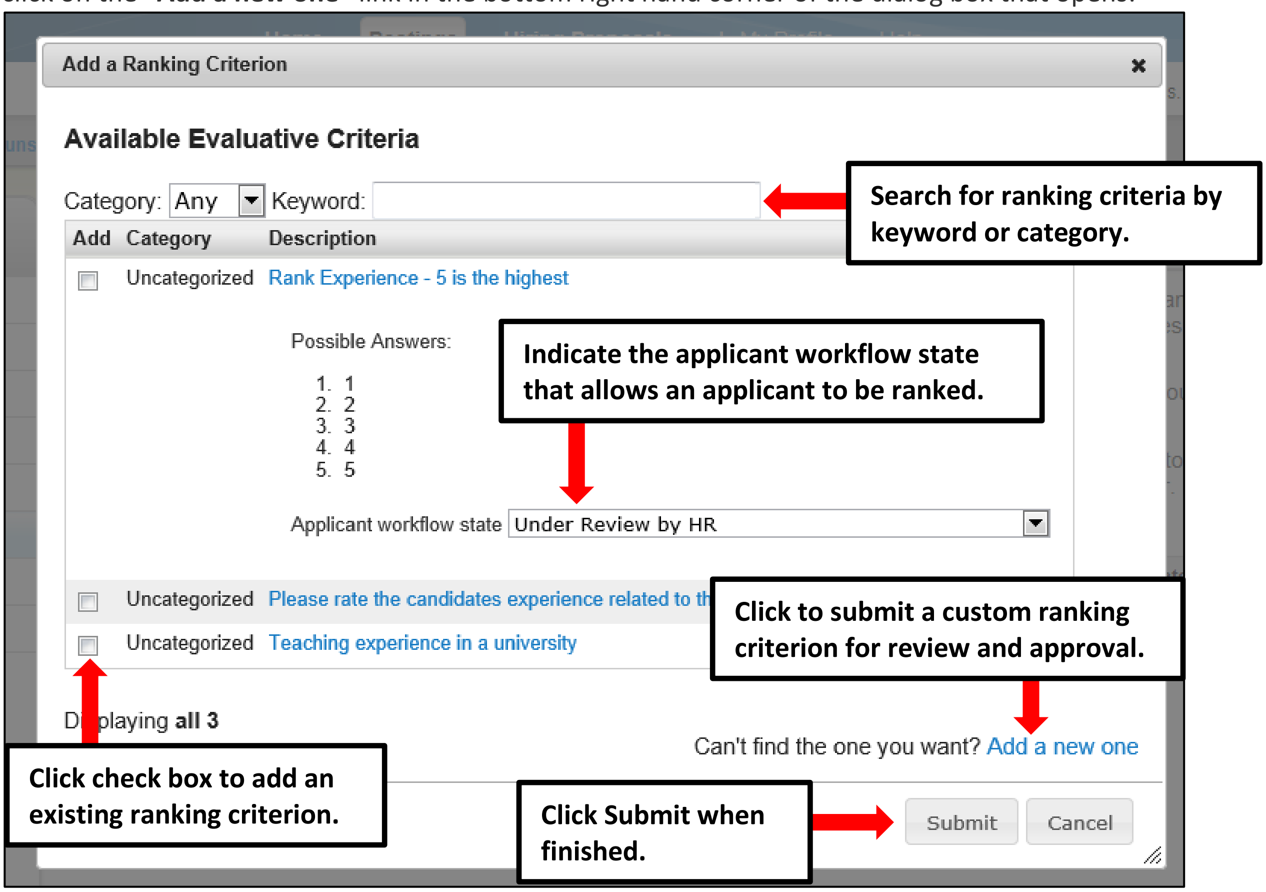


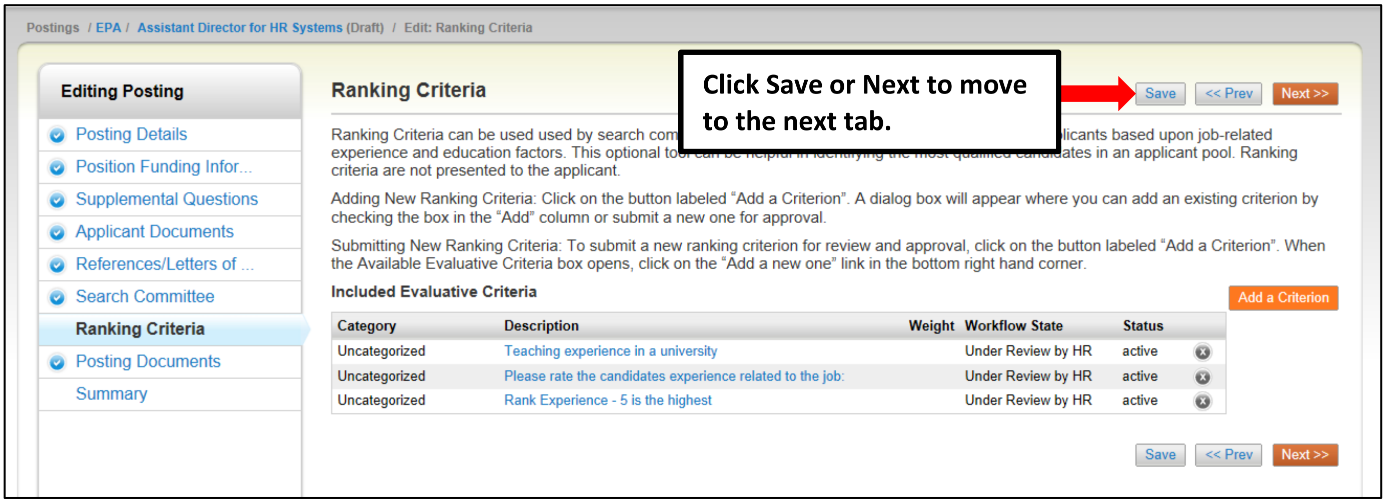
Create New EHRA Posting from an Existing Posting – Ranking Criteria Tab

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:



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:



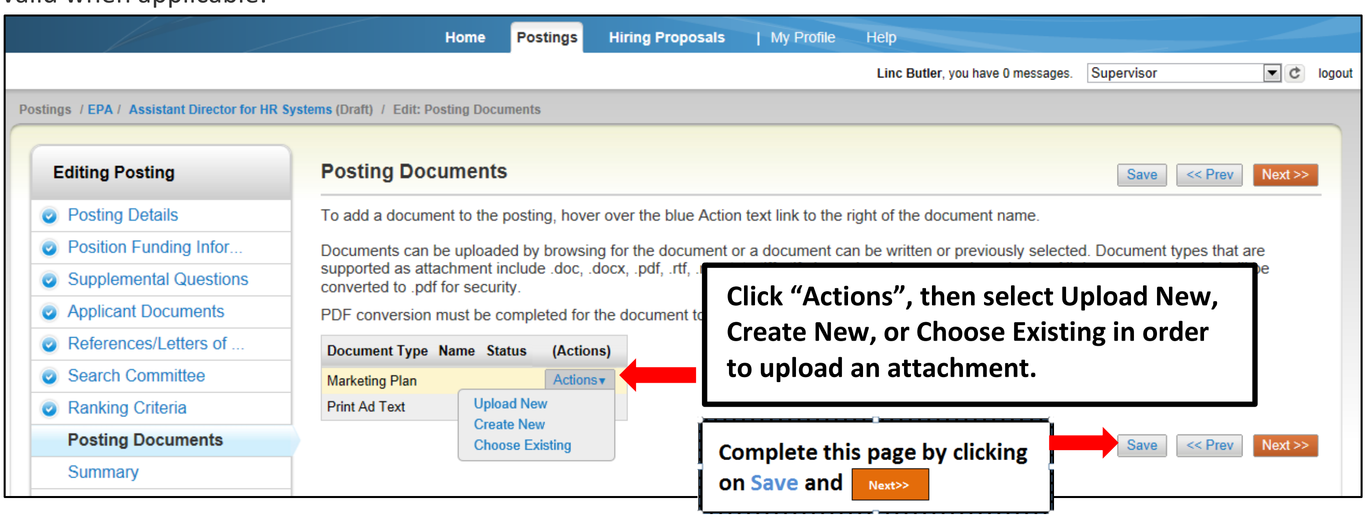


Create New EHRA Posting from an Existing Posting – Posting Documents Tab

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.

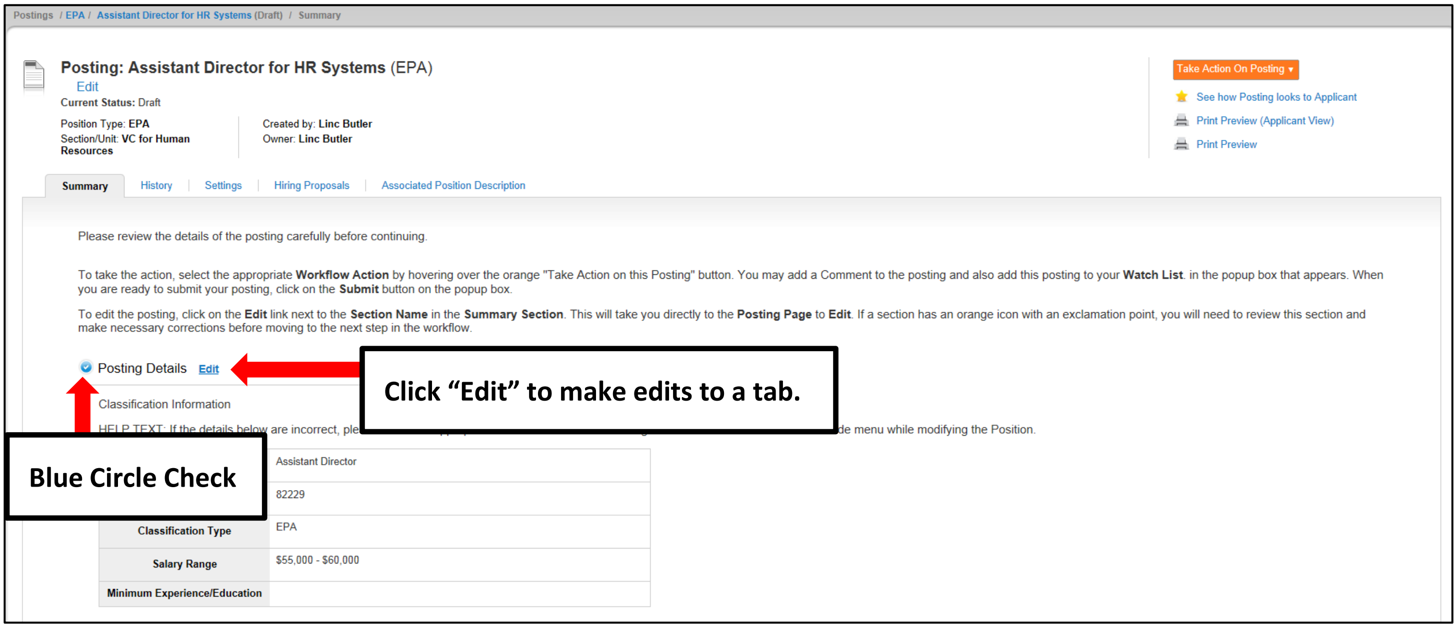
Excel and Word documents may be attached.   PDF conversion must be completed for the document to be valid when applicable:



Create New EHRA Posting from an Existing Posting – Summary Tab

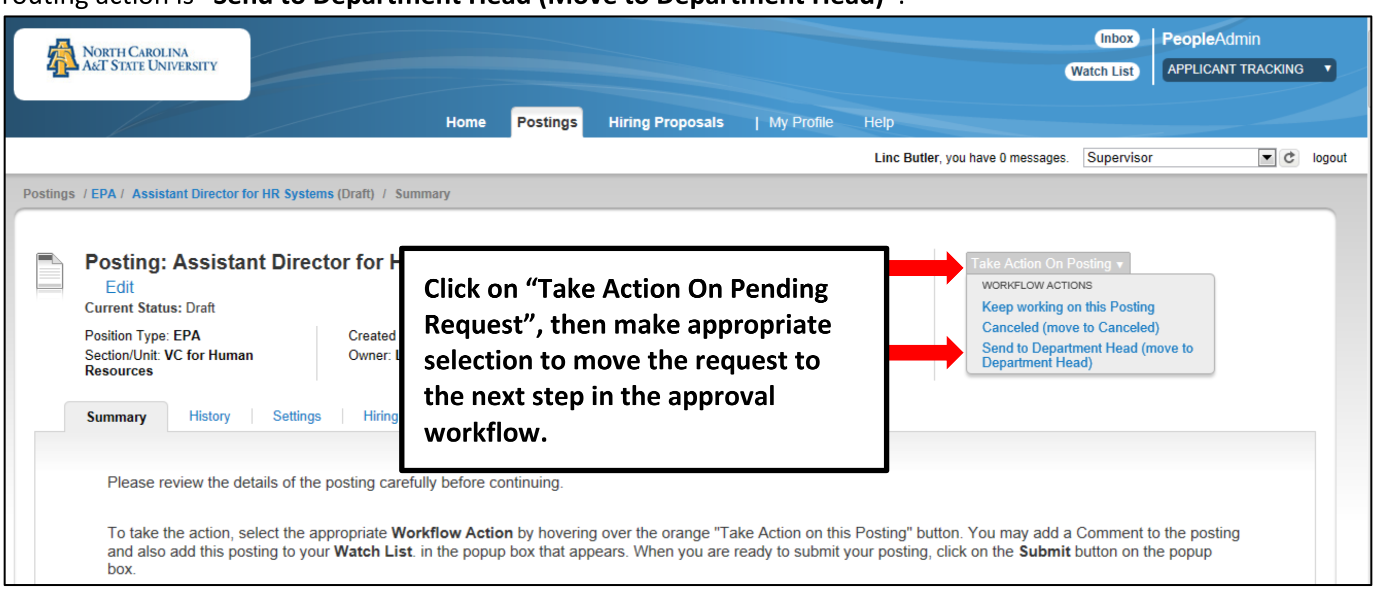
The **Summary Tab** allows you to perform a final review all of the posting information you've entered on the previous tabs prior to sending the request to the next step in the approval workflow. Please review the details of the posting summary carefully before continuing.

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

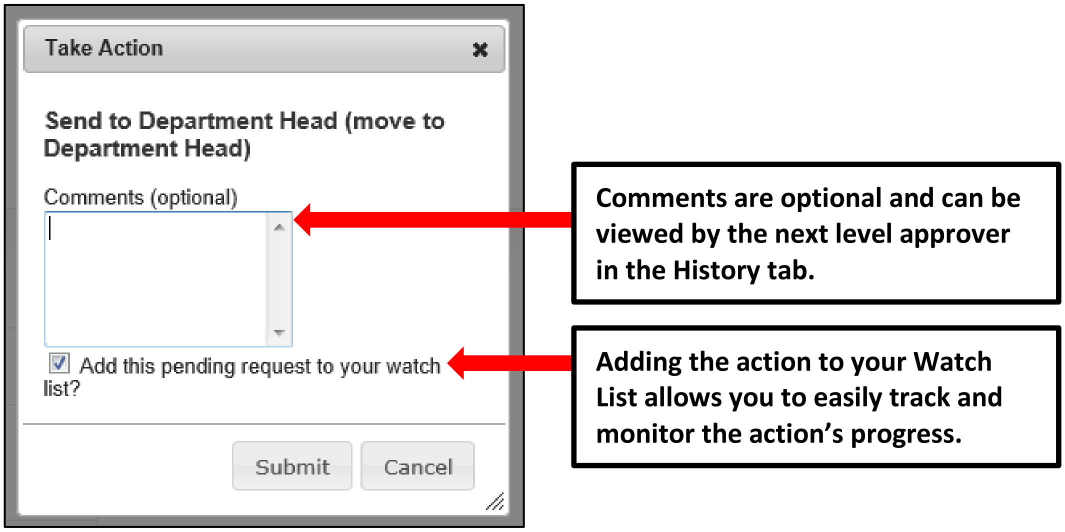


An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save",** and then return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

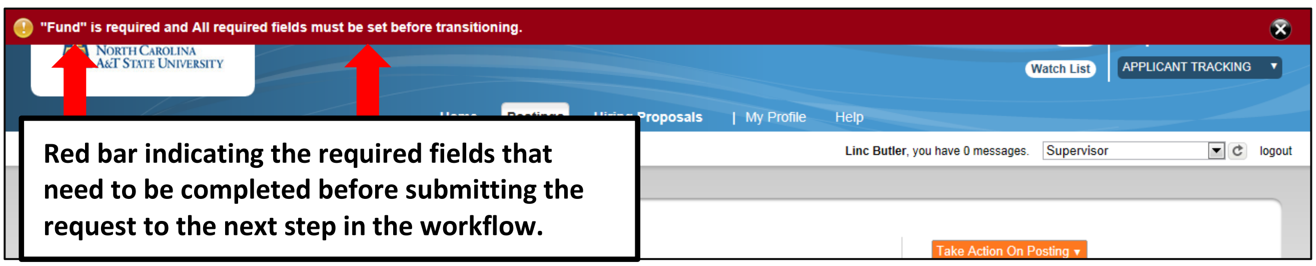
Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example,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



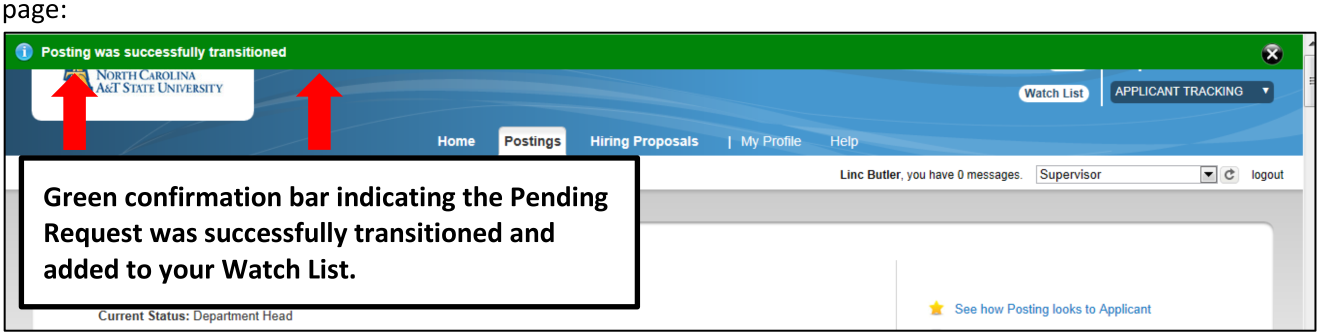
You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send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



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

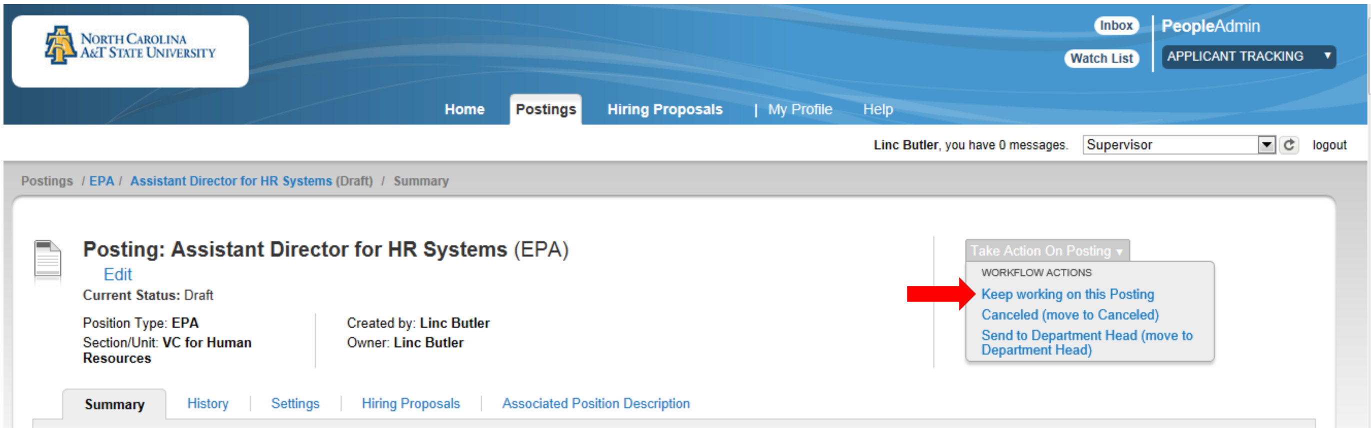


The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if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

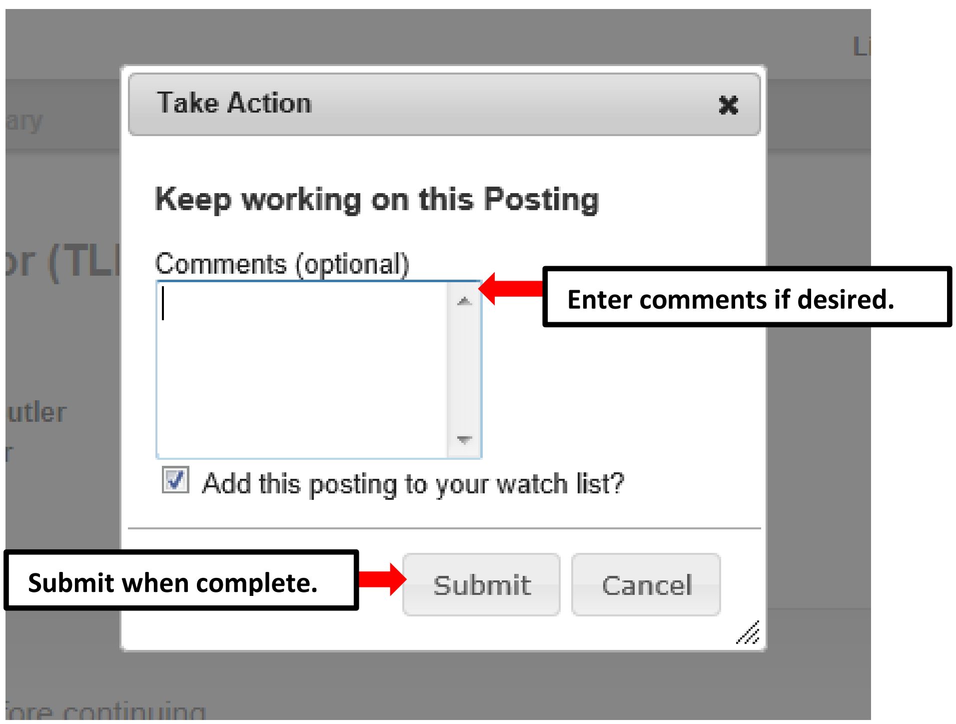
Create New EHRA Posting from an Existing Posting - Saving to Return to a Pending Request Later

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"



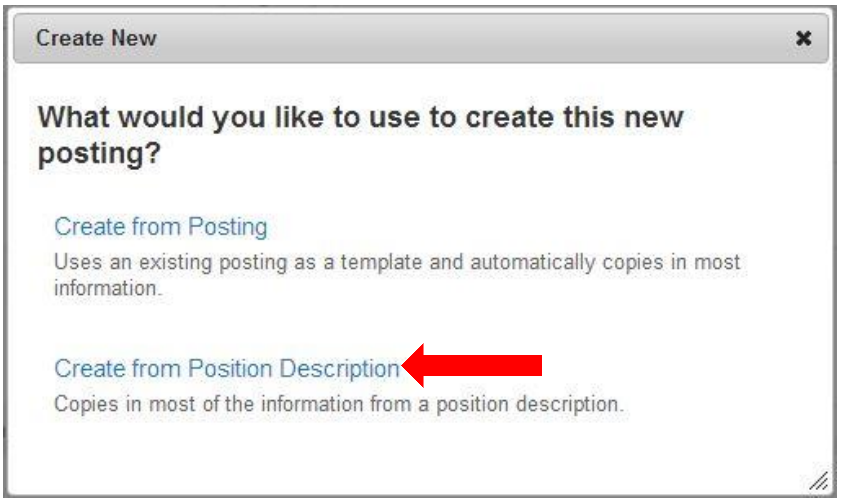
The **Posting** can be located when you log into the Applicant Tracking module again as the same **User Type** you used to begin the action. Hover your cursor over the **Postings tab** and click on "**EHRA**" You will then return to the **EHRA Postings view**, which provides a list of all postings based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

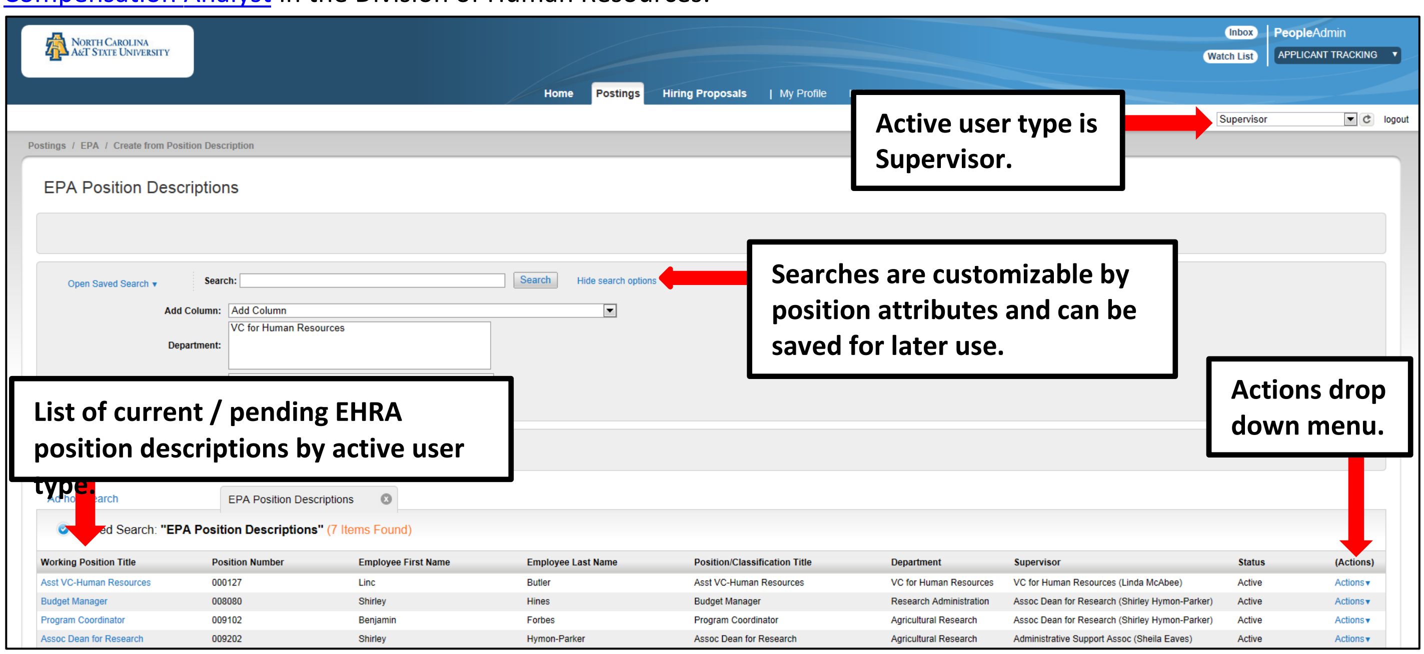
Select **Create from Position Description** if you wish to create a posting using information from a position description that has previously been approved in the PeopleAdmin system.

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.

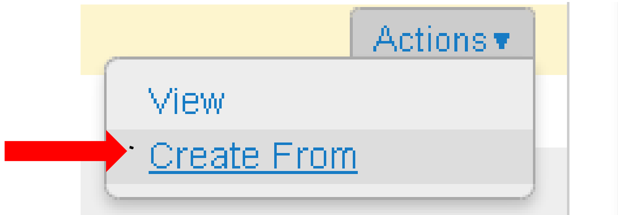
Choosing the **Create from Position Description** option copies information from an existing position description into a new posting:



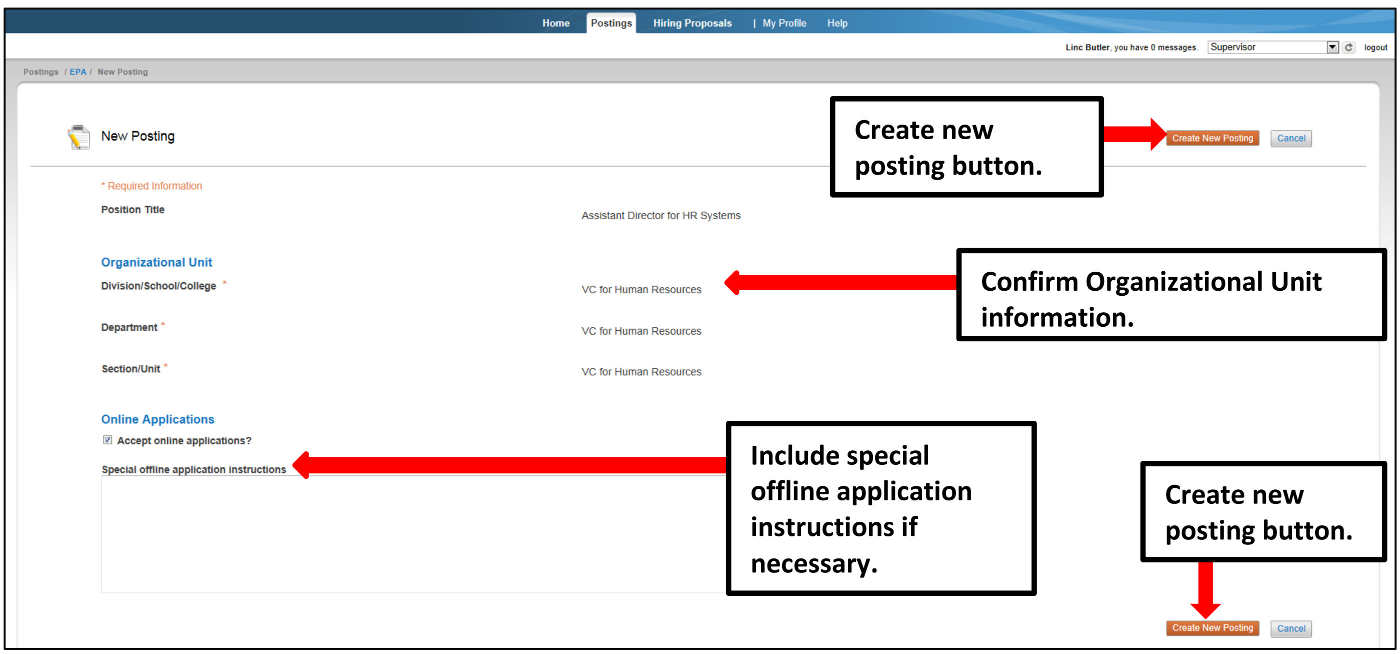
After clicking on **Create from Position Description,** you will be taken to the **EHRA Position Descriptions** view, where you can search position descriptions by any number of criteria, including but not limited to position title, posting number, position number, department name, or supervisor name. 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 Classification and Compensation Analyst in the Division of Human Resources:



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:**



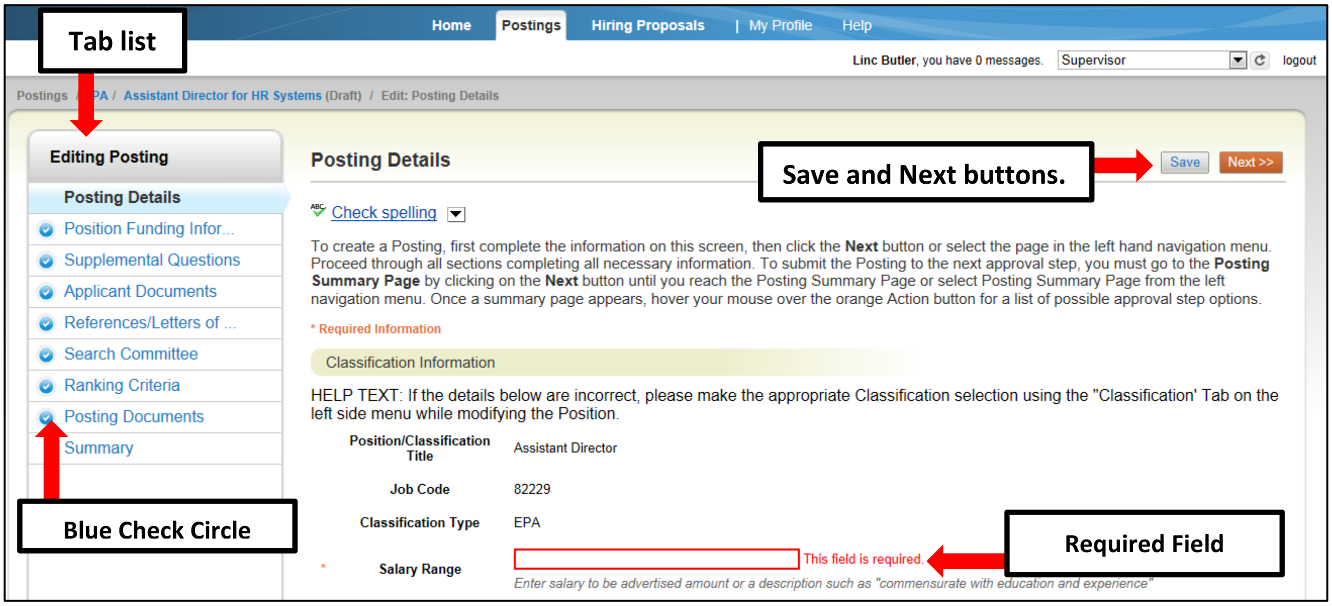
By clicking **Create From**, the **New Posting** form will appear. This is where you can update the working title of the position for the purpose of posting, and view **Organizational Unit** information to confirm accuracy. You can also provide **Special Offline Application Instructions** in the field 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:



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 tabs that will appear as blue links.

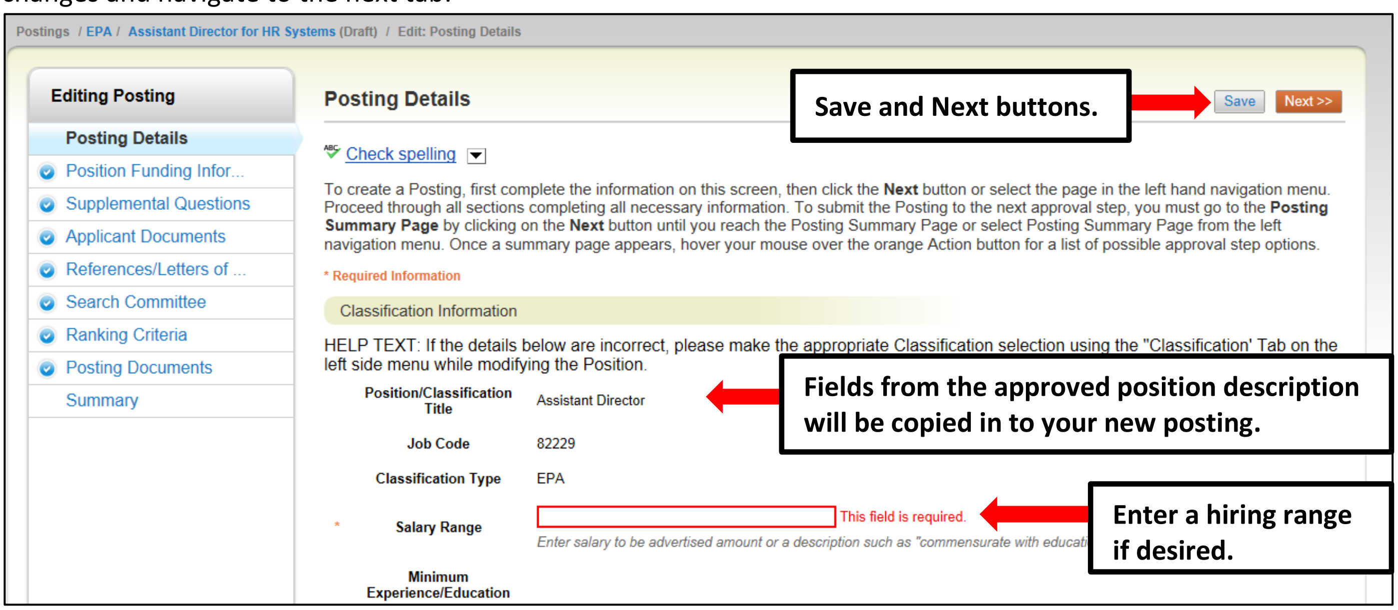
You can save the changes you've made to the active tab you're working on and navigate to the next tab in the list simultaneously by clicking the **Next >>** button located in both the top and bottom right corners of the page. You can save the active tab you're working on and stay on the same tab by clicking 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.

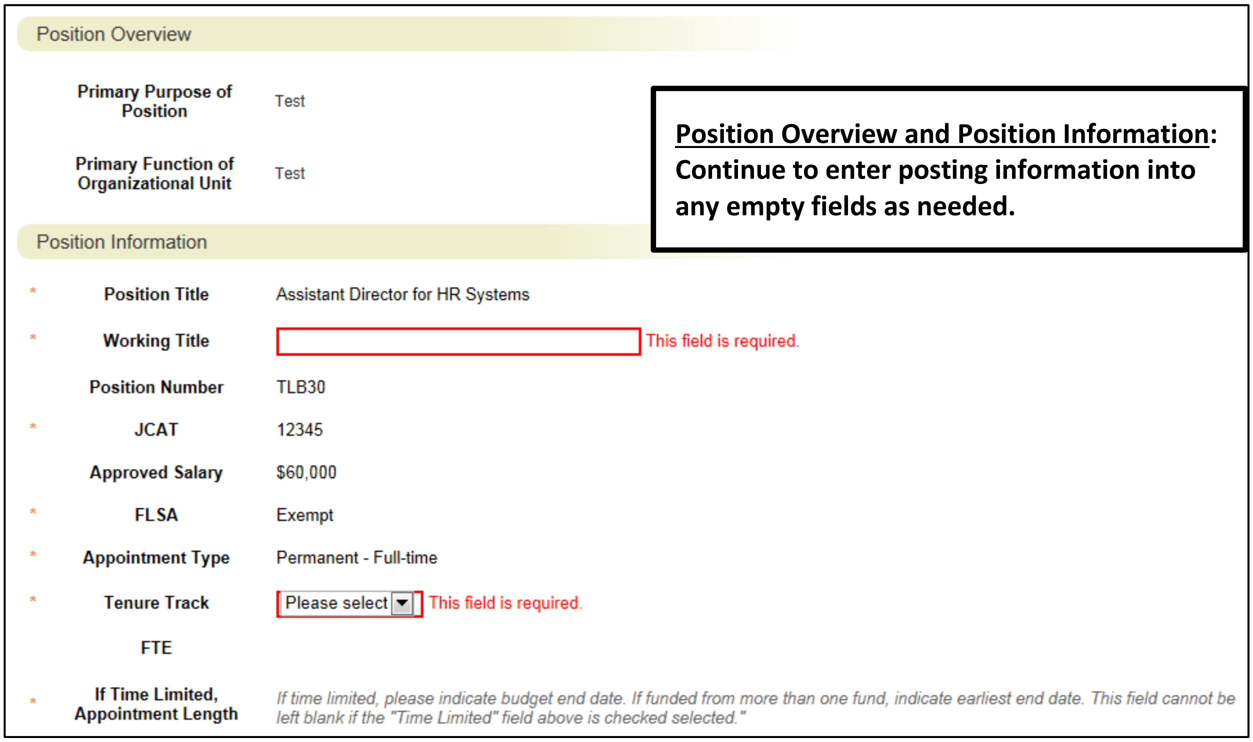
Required fields are highlighted in **red** and must be filled in before the new **EHRA Posting** can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check Circle**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



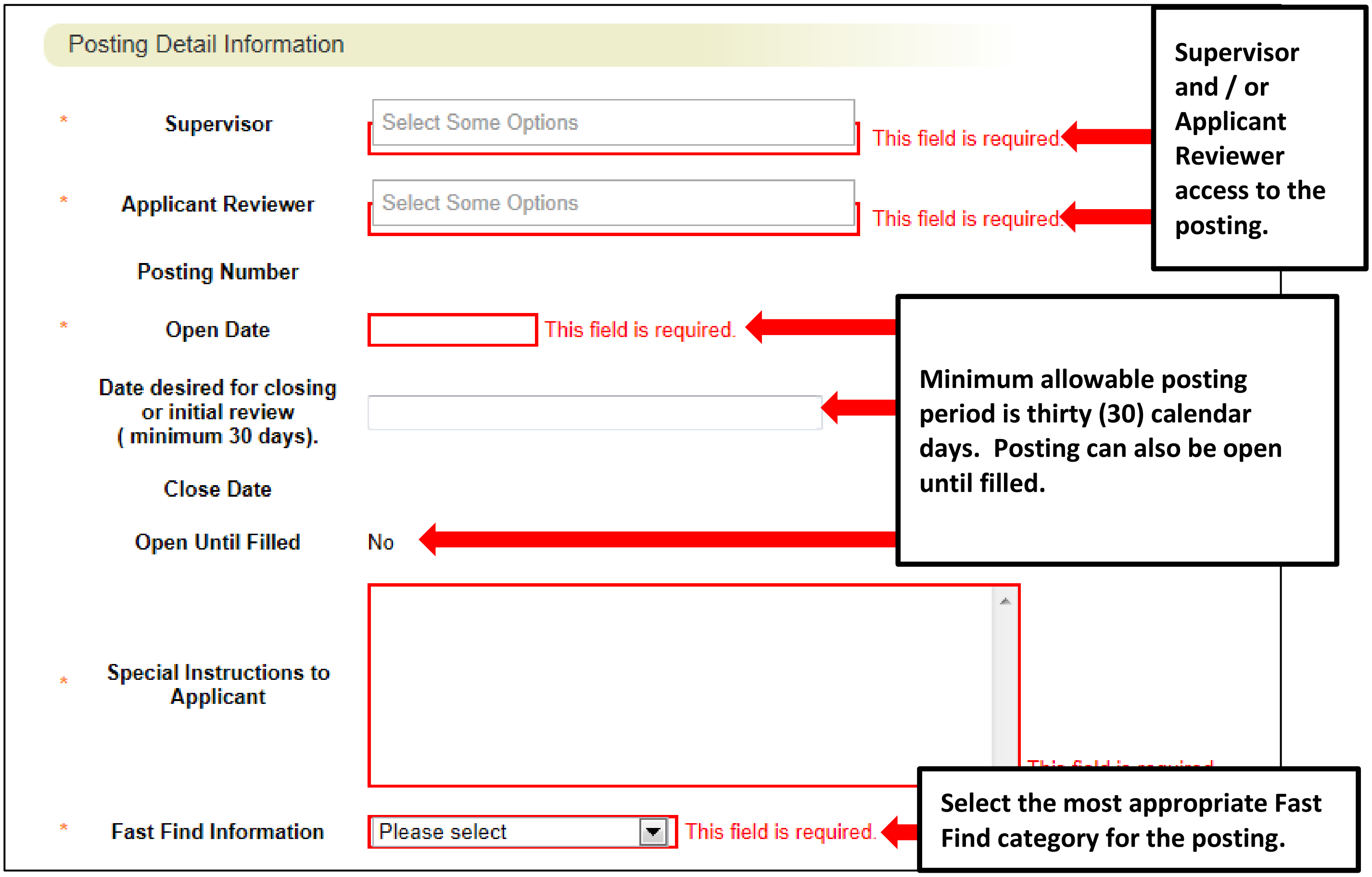
Create New EHRA Posting from a Position Description – Posting Details Tab

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 Next >> the button to save changes and navigate to the next tab:

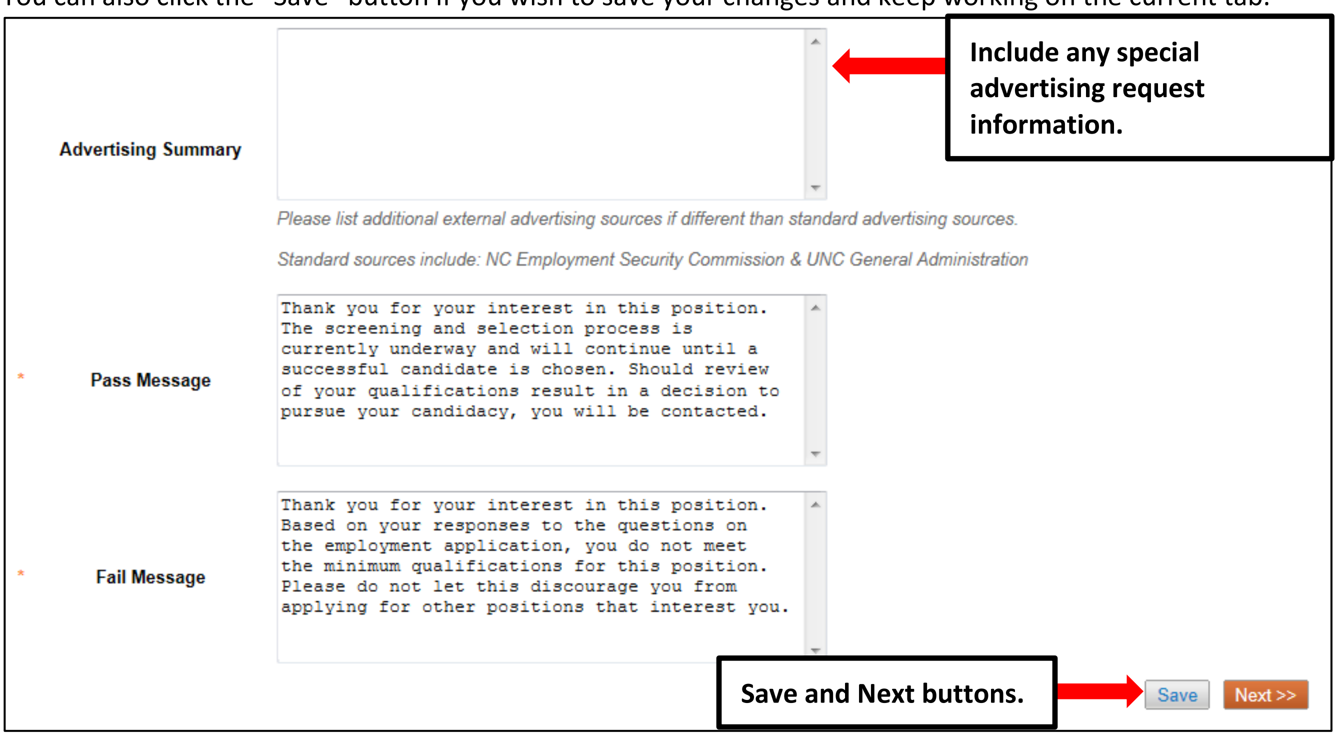




You can indicate other users you would like to have **Supervisor** and / or **Applicant Reviewer** access to the posting by searching for their name in the Supervisor and Applicant Reviewer fields. Indicate the proposed **Open Date** and **Date Desired for Closing or Initial Review (minimum 30 days)**, 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:

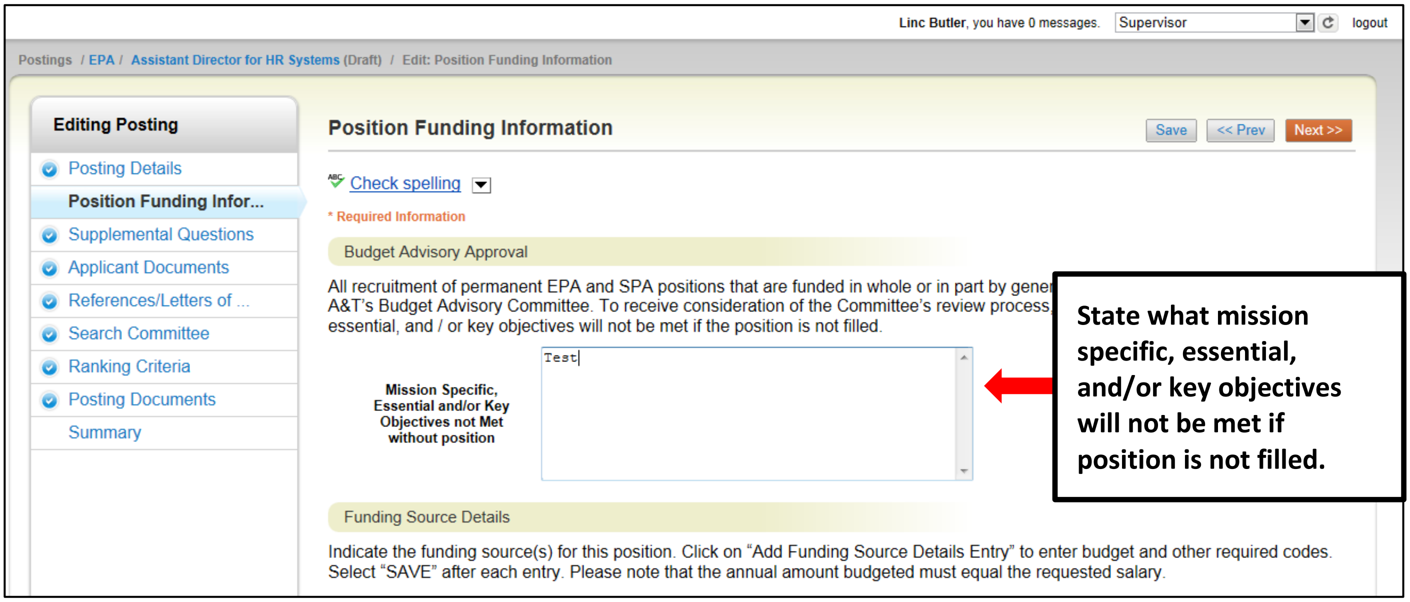


Include details regarding any special advertising requests, such as posting the position on additional job posting websites or in specific print media outlets, in the **Advertising Summary** field. A link to the job posting on the North Carolina A&T State University applicant portal will be included 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.



Create New EHRA Posting from a Position Description – Position Funding Information Tab

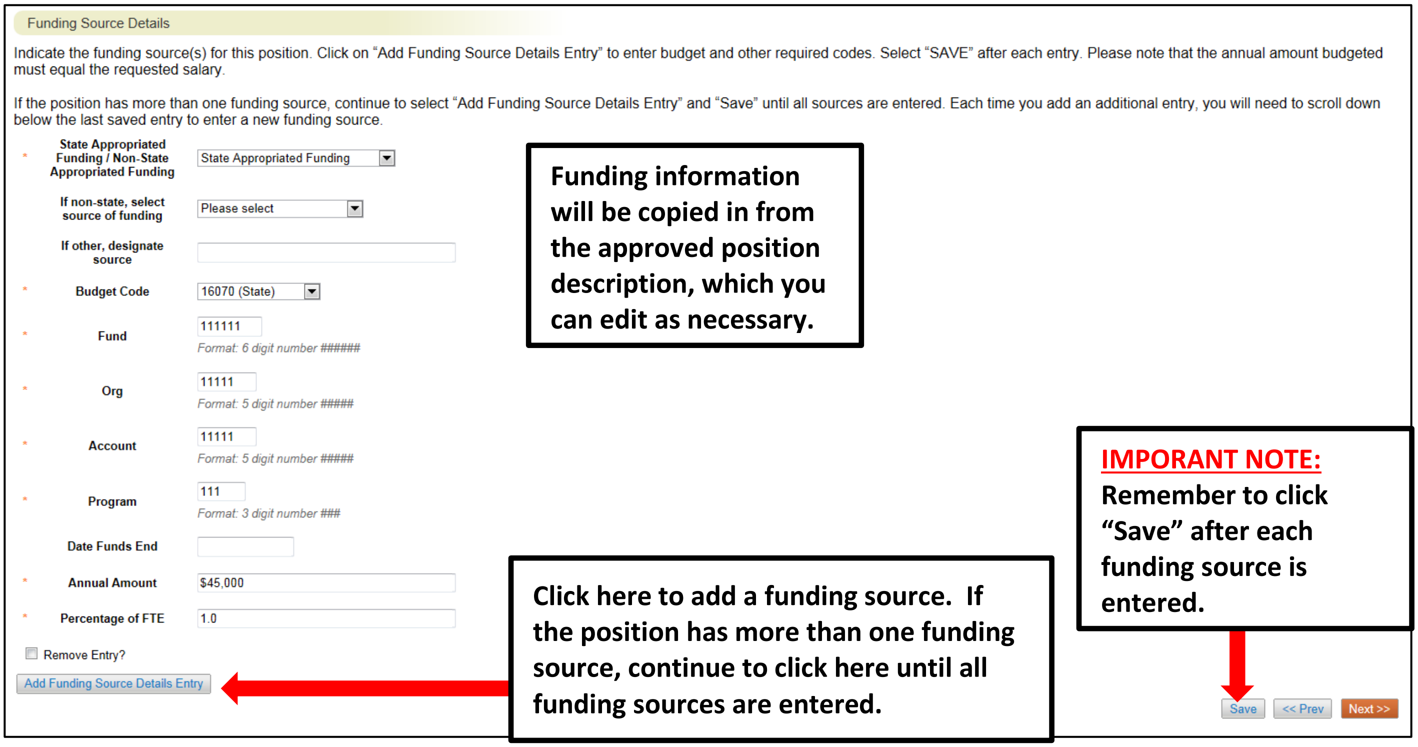
In the Budget Advisory Approval section of this tab, state what mission specific, essential, and / or key objectives will not be met if the position is not filled. All recruitment of permanent EHRA and SHRA positions that are funded in whole or in part by **general state funds** requires approval by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



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.

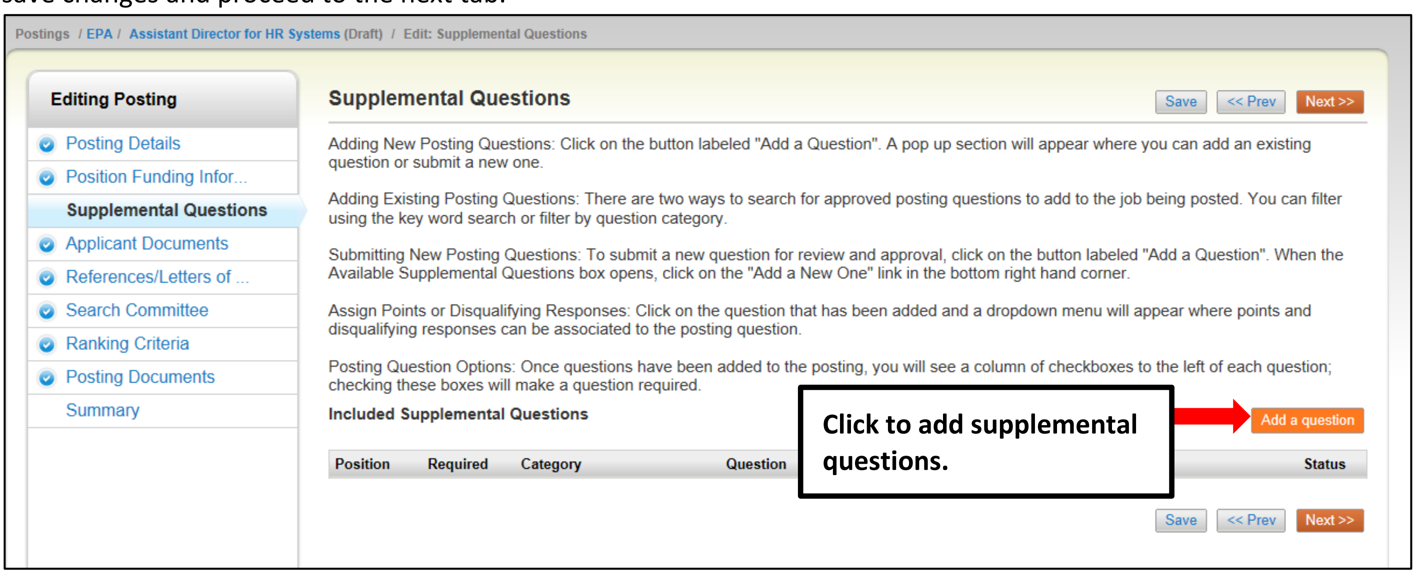
If you are unsure of what fund to use, the most up to date information may be found in **Banner Finance** on these forms:
1) **FTVORGN**- Provides a list of Org Codes
2**) FTVFUND**- Provides a list of Funds
3) **FTVACCT**- Provides a list of Accounts
These forms show listings of all active funds. For 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:



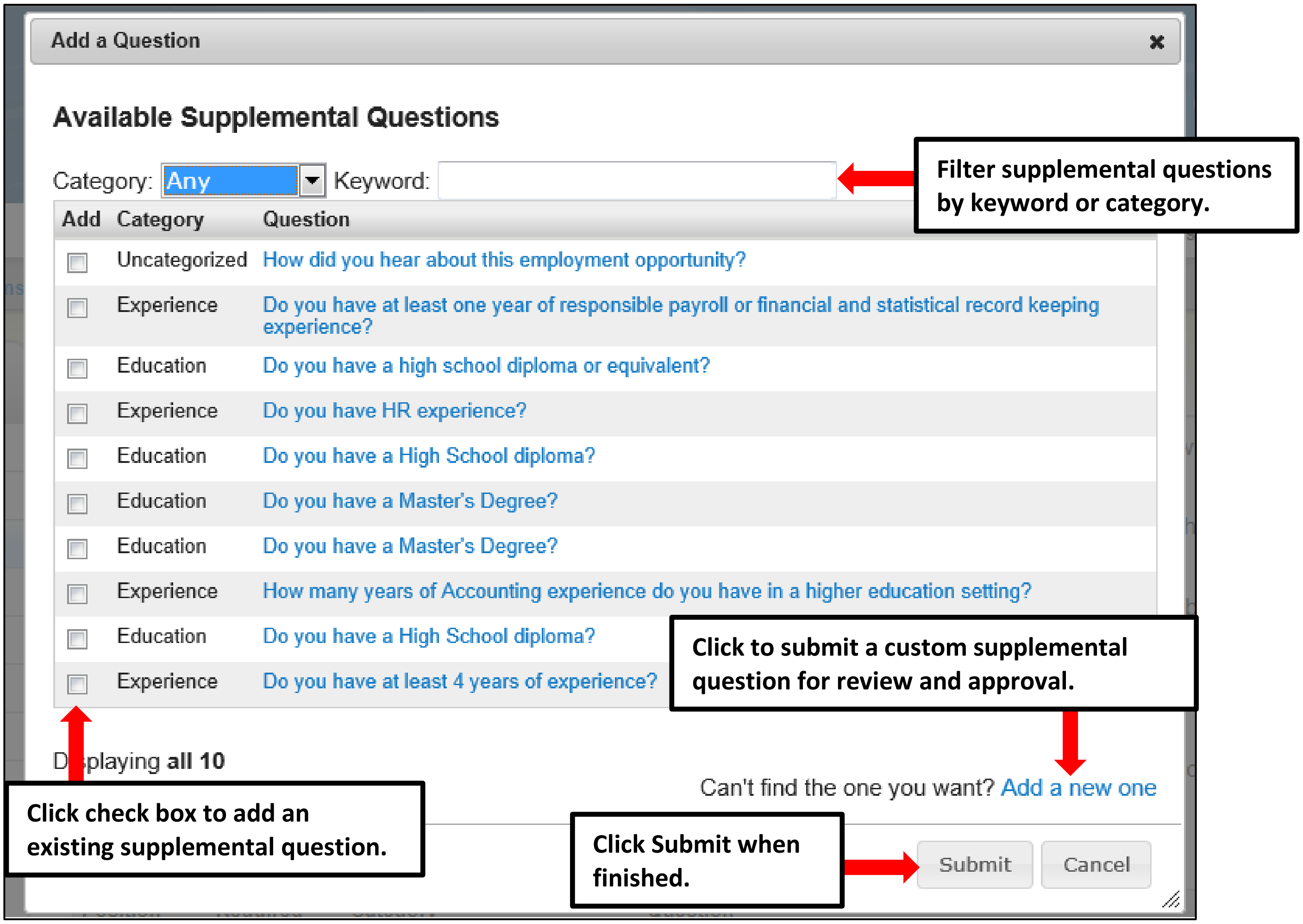
Create New EHRA Posting from a Position Description – Supplemental Questions Tab

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:



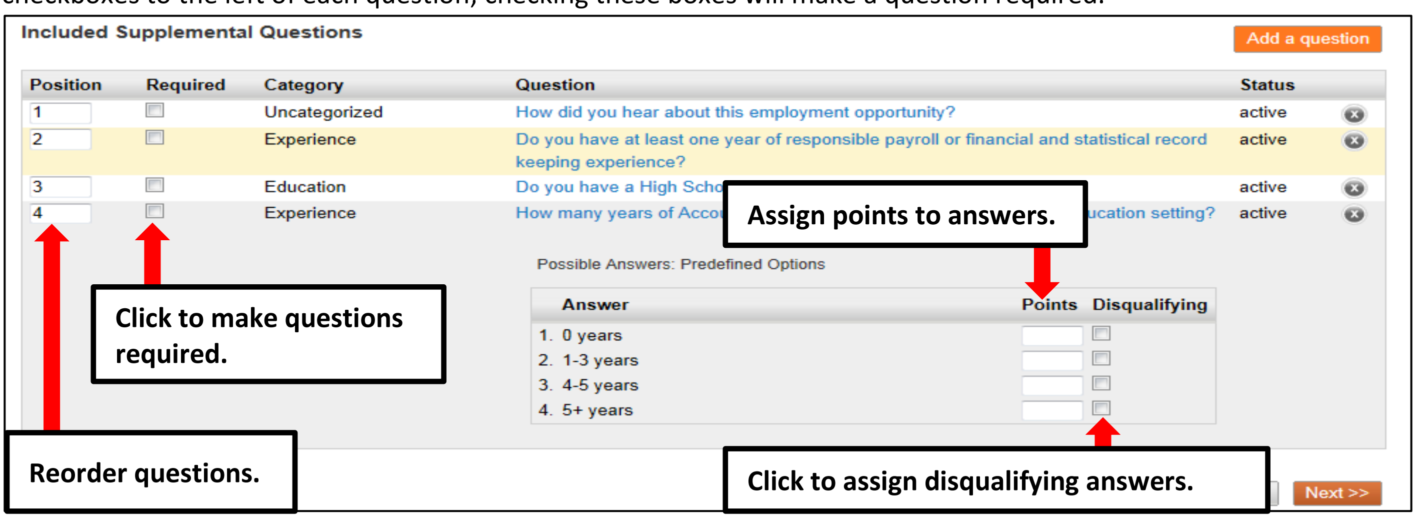
Adding Existing Posting Questions: There are two ways to search for approved posting questions to add to the job being posted. You can filter using the key word search or filter by question category. To add an existing question, click the check box next to the question you wish to add.

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.



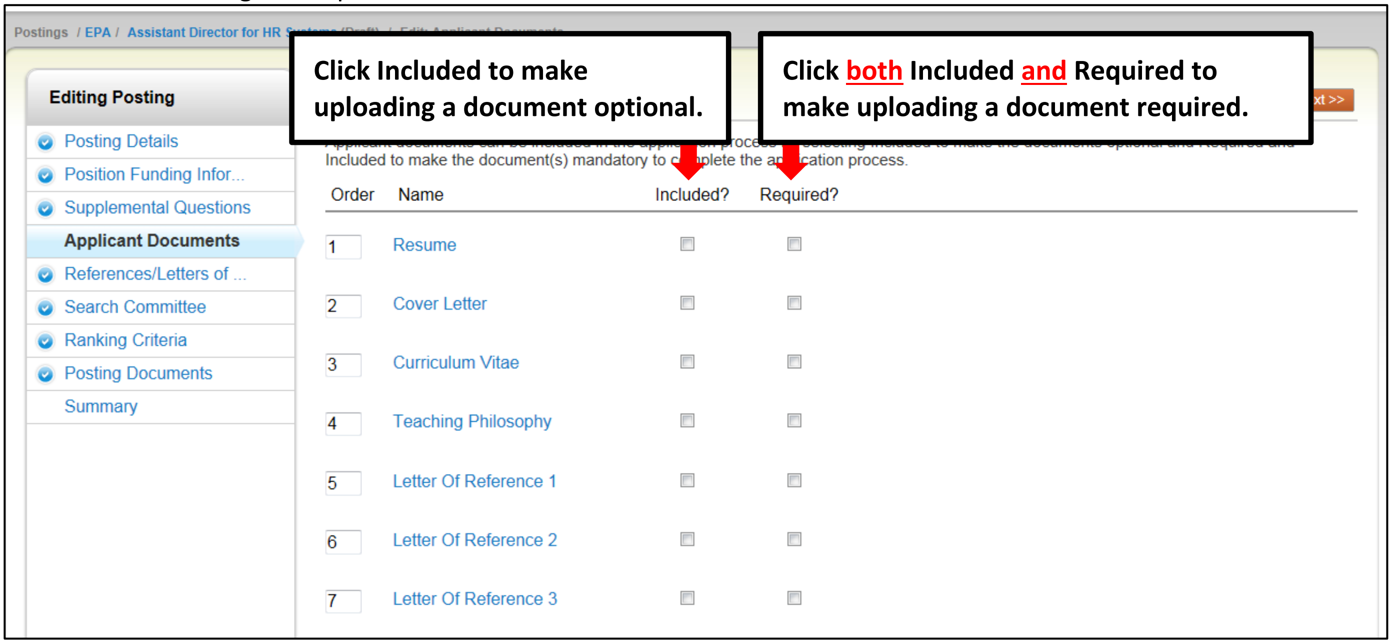
Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear where points and disqualifying responses can be associated to the posting question.

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.



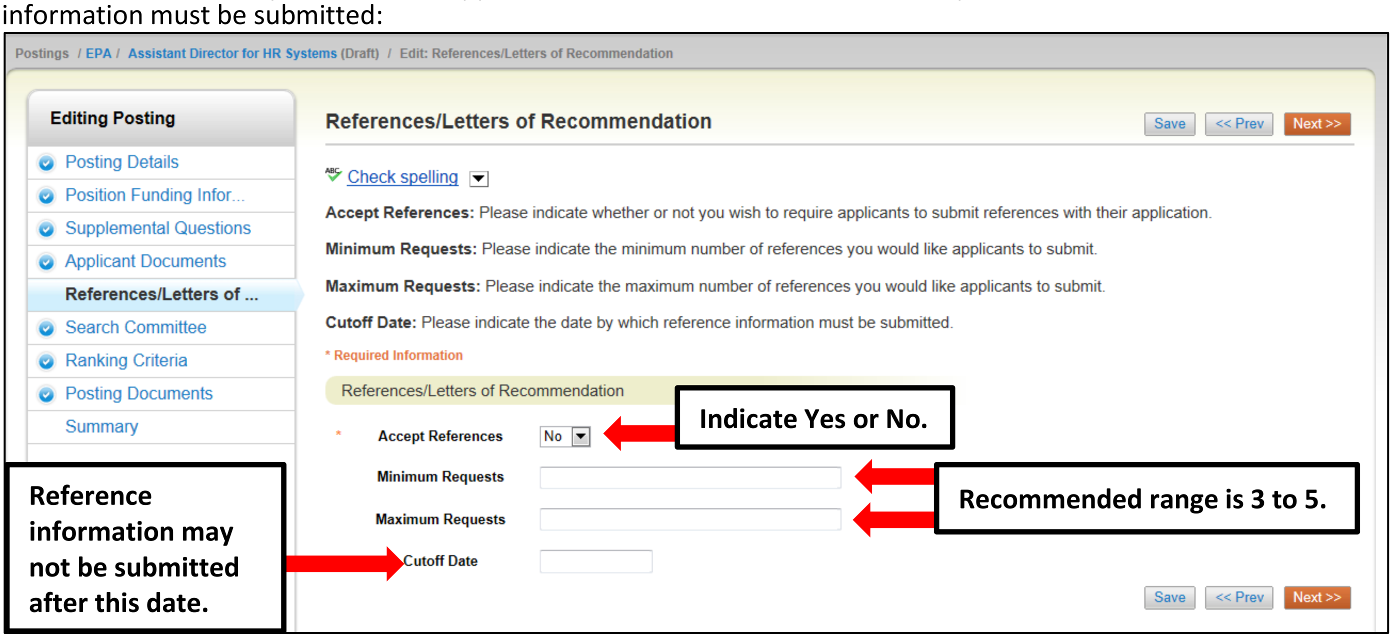
Create New EHRA Posting from a Position Description – Applicant Documents Tab

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:



Create New EHRA Posting from a Position Description – References / Letters of Recommendation Tab

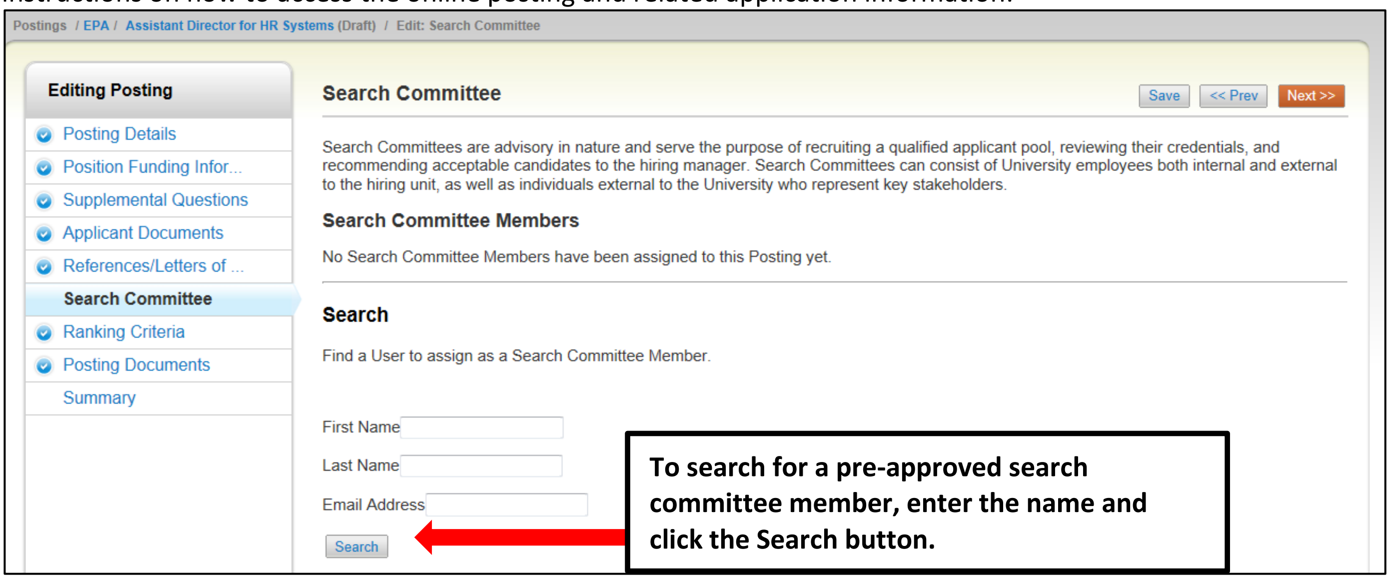
In the **References / Letters of Recommendation** tab, you can indicate whether or not you wish to require applicants to submit references with their application. You can also indicate the minimum and maximum number of references you would like applicants to submit, and the cutoff date by which reference information must be submitted:



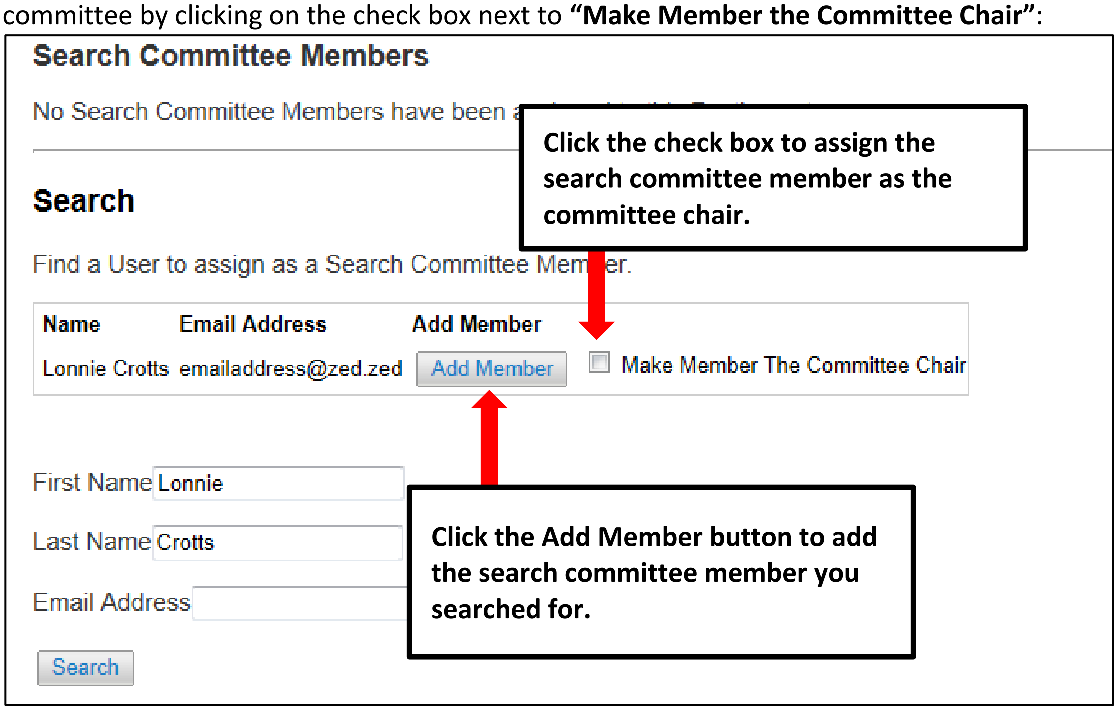
Create New EHRA Posting from a Position Description – Search Committee Tab

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.

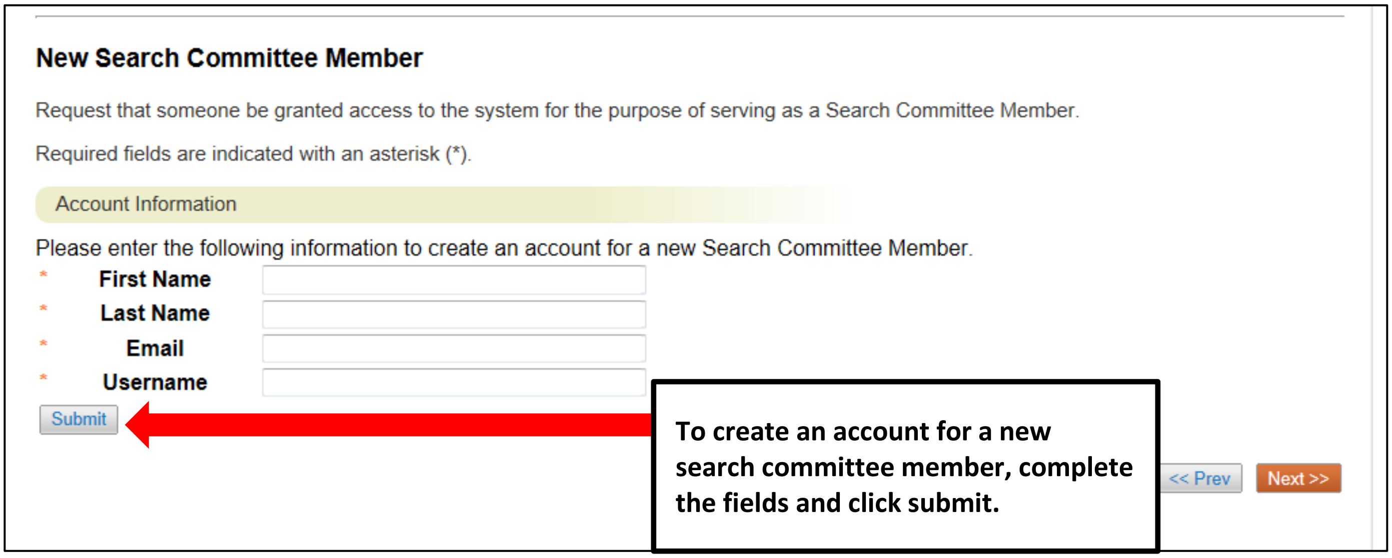
In the **Search Committee** tab, you can assign search committee members who will have access to review application information for a specific posting. Search committee members can view applications, applicant documents, and evaluate / rank applicants based upon ranking criteria you establish as part 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:



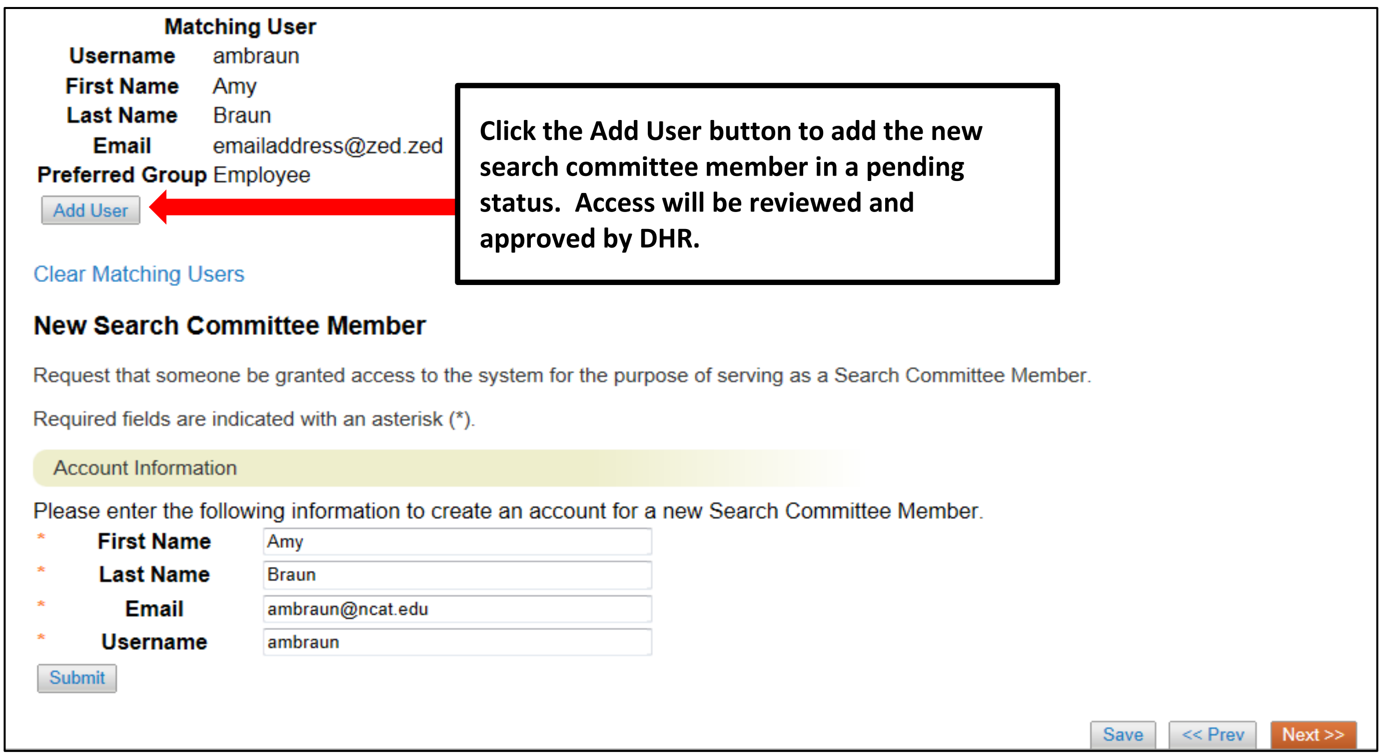
After searching for a pre-approved search committee member, click on the **Add Member** button to add them to your search committee. You can also make a search committee member the chair of the search committee by clicking on the check box next to **"Make Member the Committee Chair"**:



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:

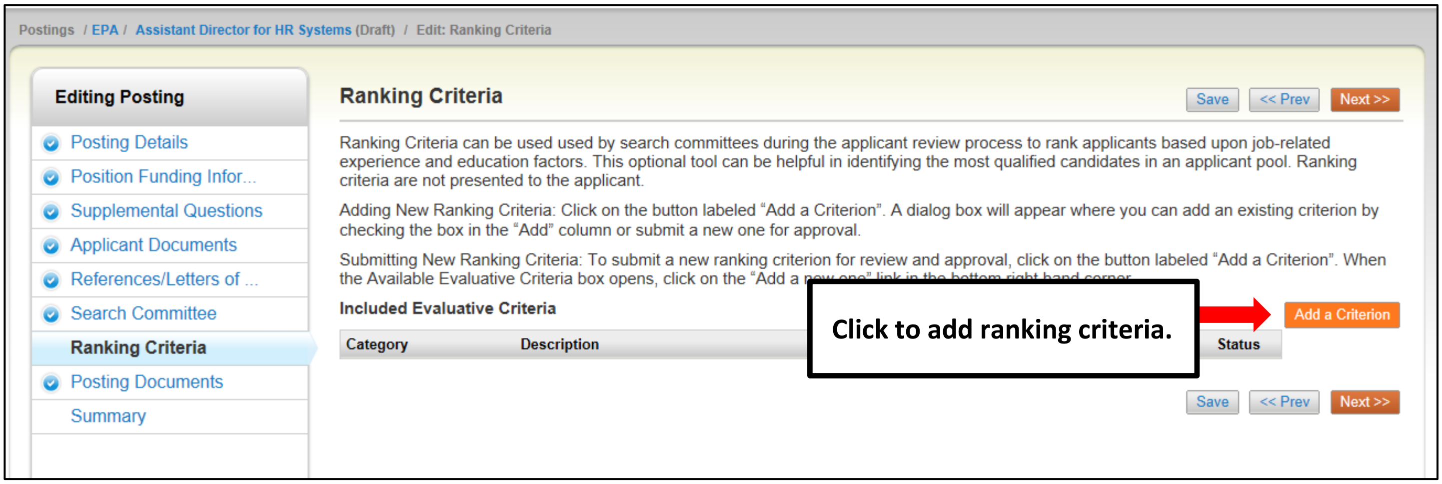


If the requested search committee member is already an assigned user of the PeopleAdmin system, their user account information will be displayed, and you can add them to your search committee by clicking on the **Add User** button:

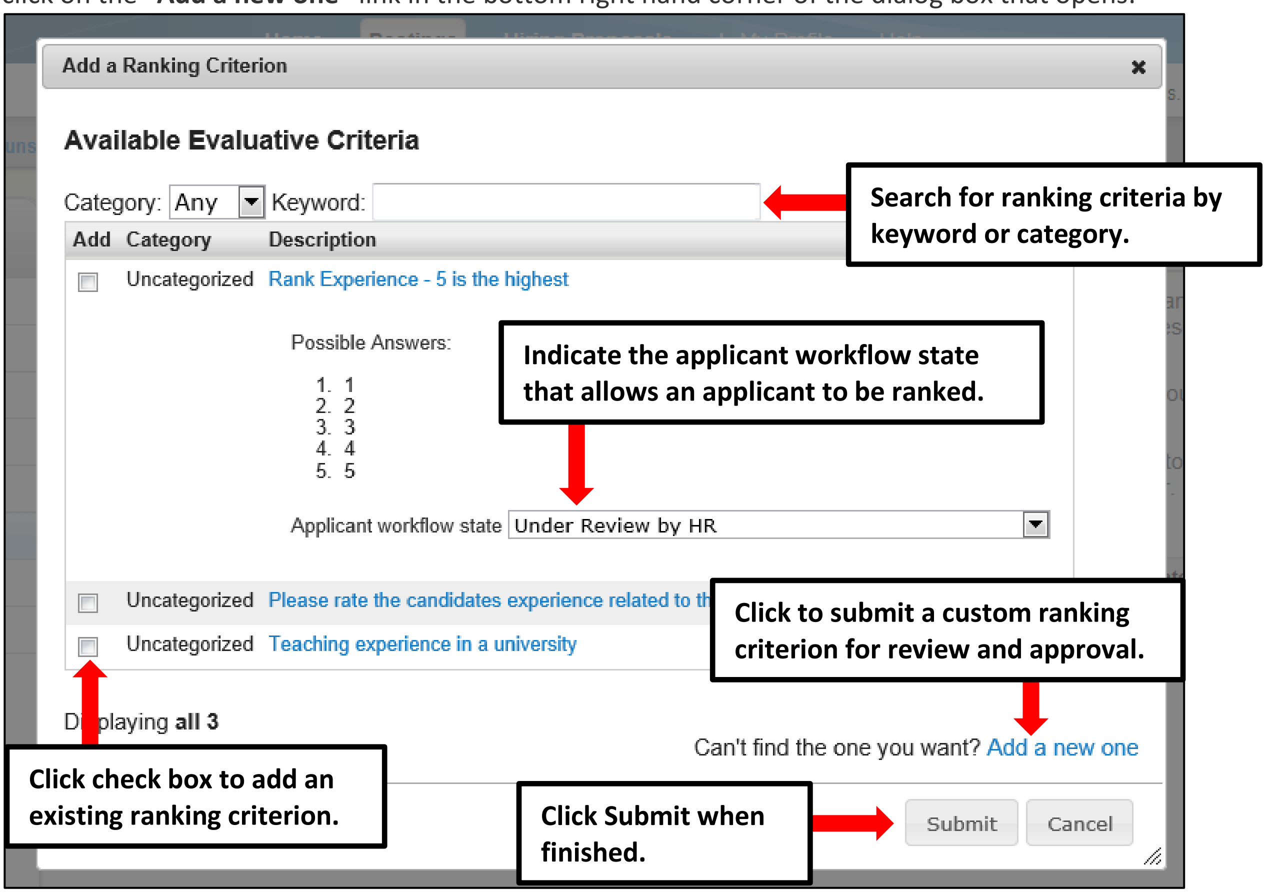


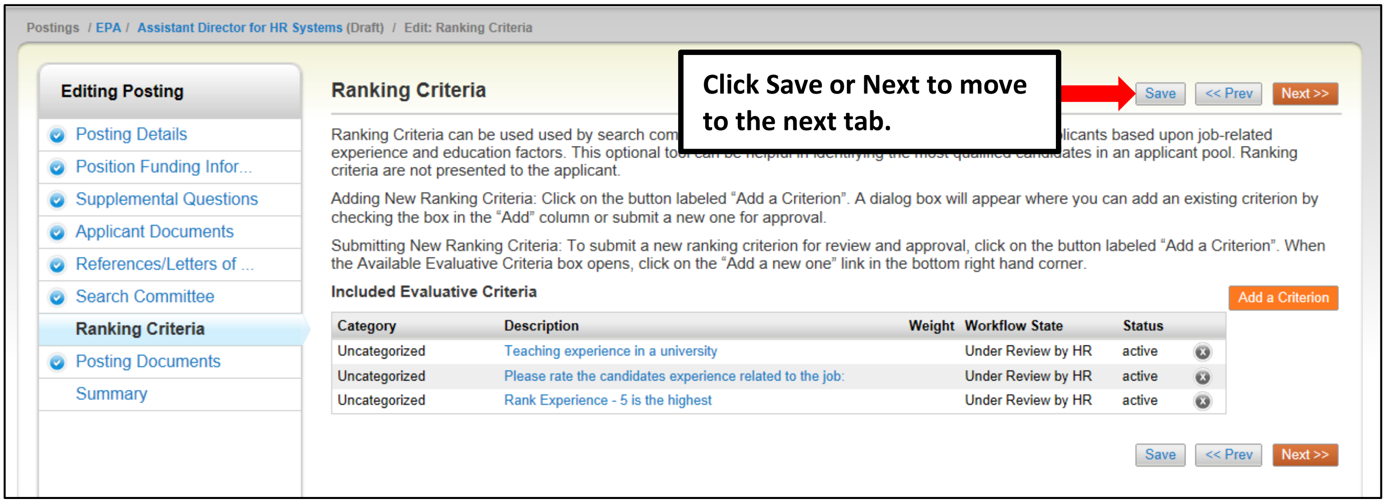
Create New EHRA Posting from a Position Description – Ranking Criteria Tab

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:



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:



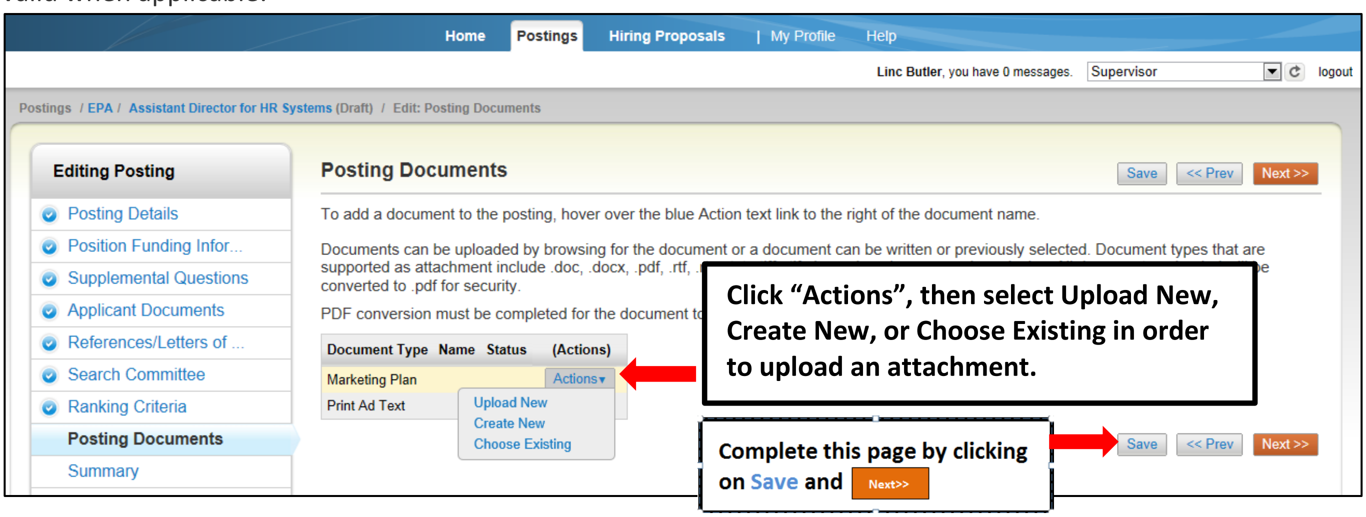


Create New EHRA Posting from a Position Description – Posting Documents Tab

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.

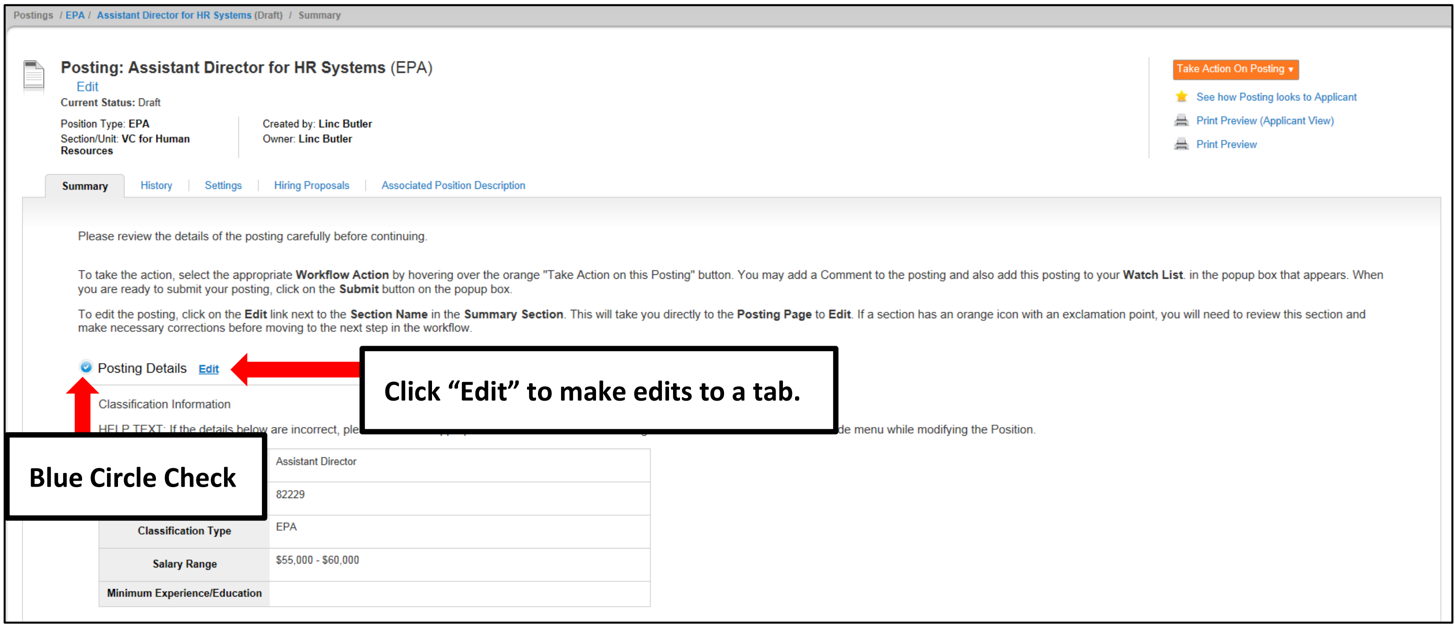
Excel and Word documents may be attached. PDF conversion must be completed for the document to be valid when applicable:



Create New EHRA Posting from a Position Description – Summary Tab

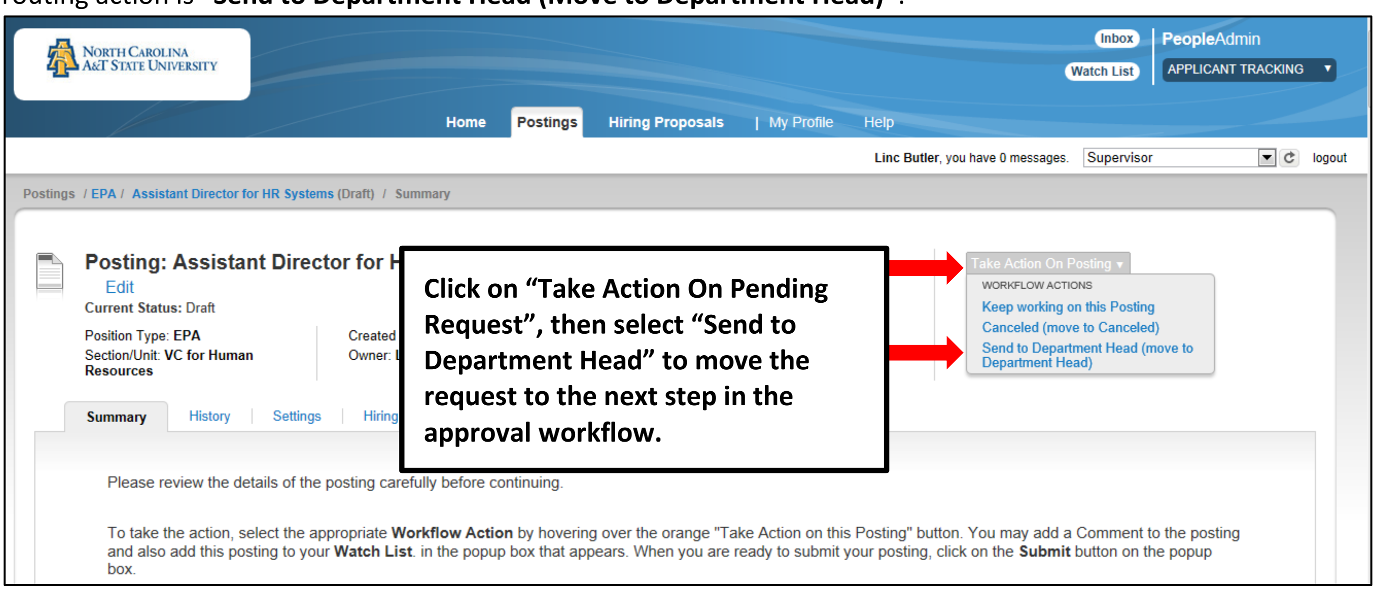
The **Summary Tab** allows you to perform a final review all of the posting information you've entered on the previous tabs prior to sending the request to the next step in the approval workflow. Please review the details of the posting summary carefully before continuing.

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

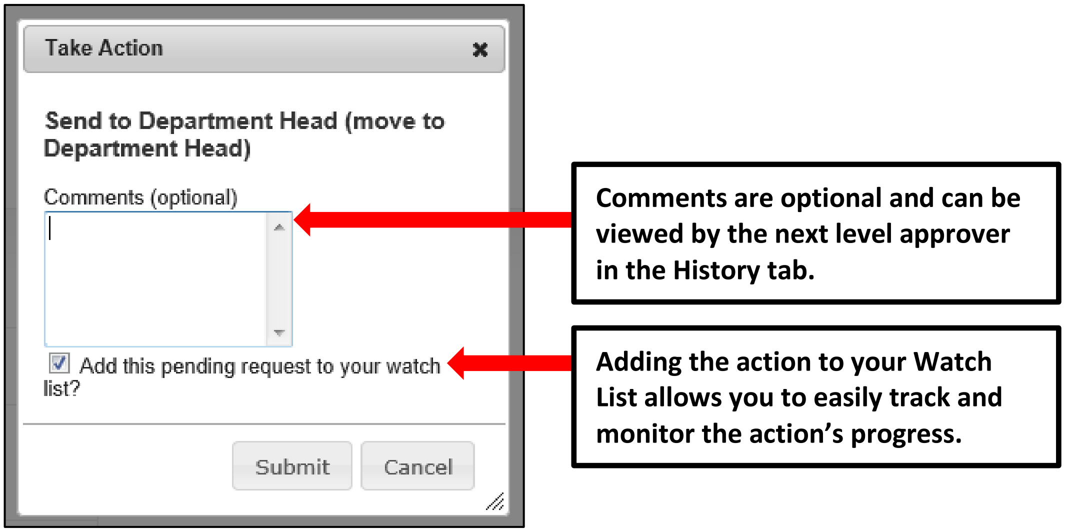


An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save",** and then return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

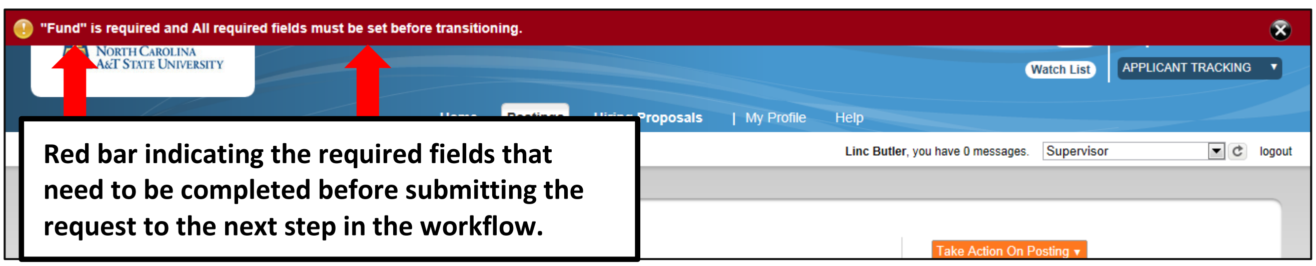
Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example,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



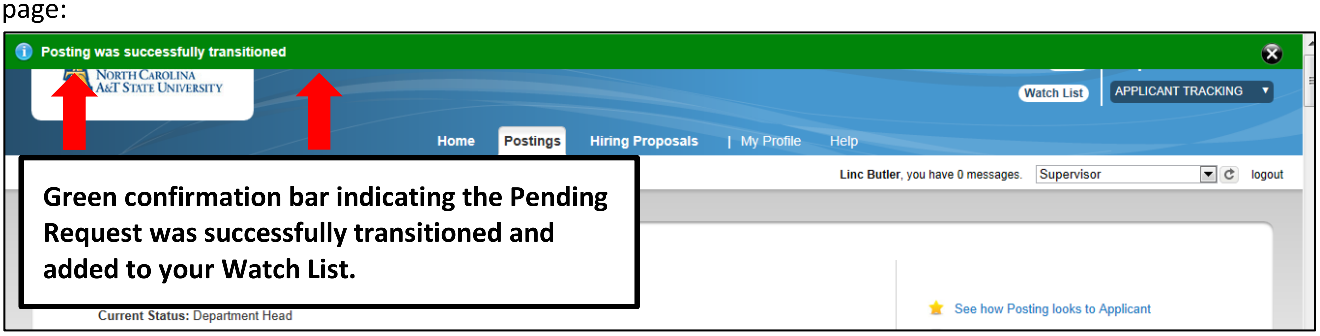
You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send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



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

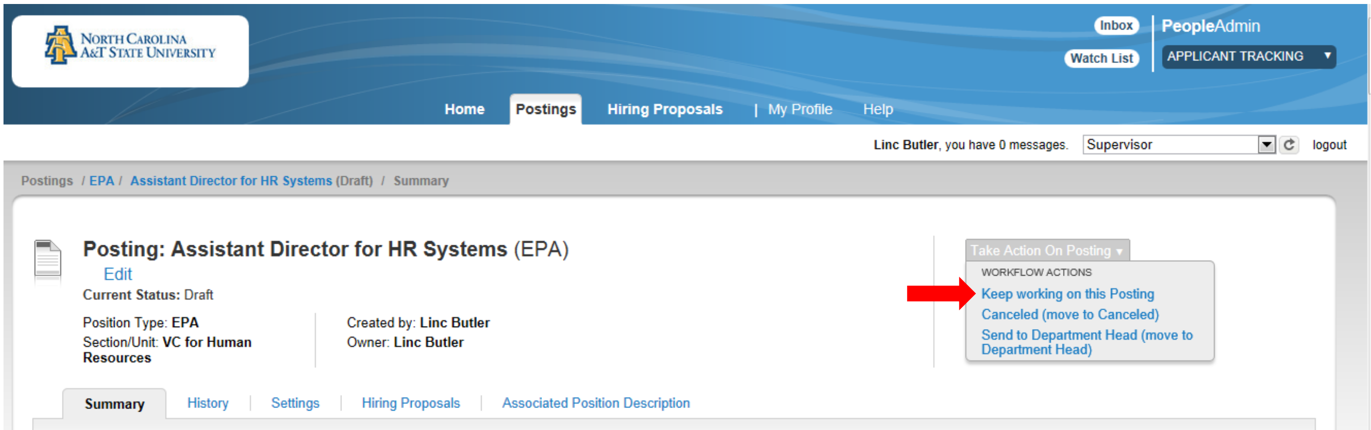


The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if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

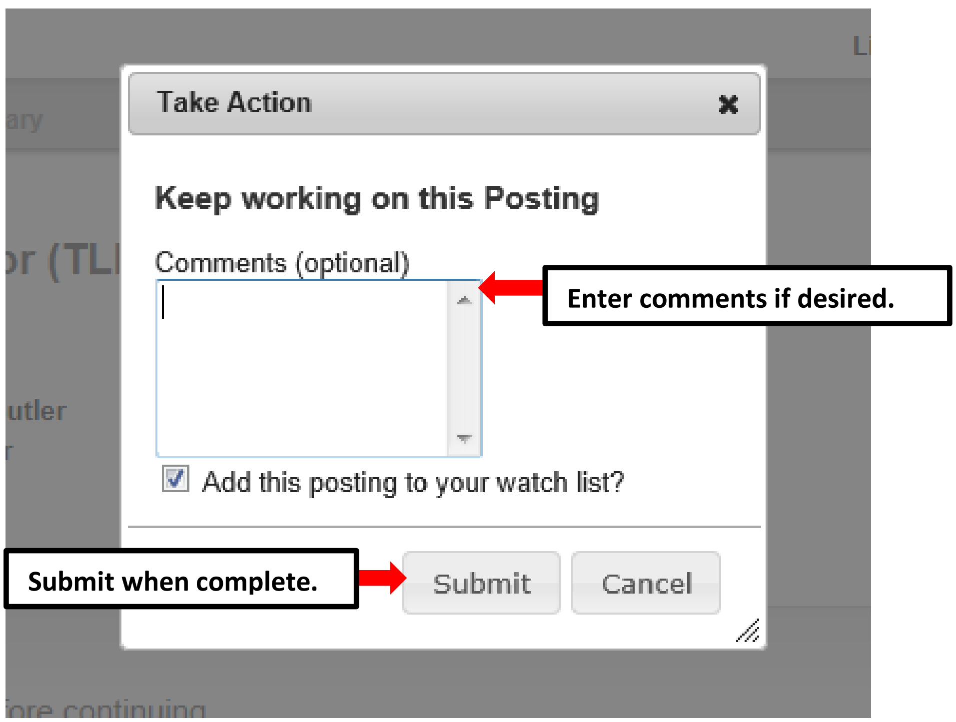
Create New EHRA Posting from a Position Description - Saving to Return to a Pending Request Later

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”



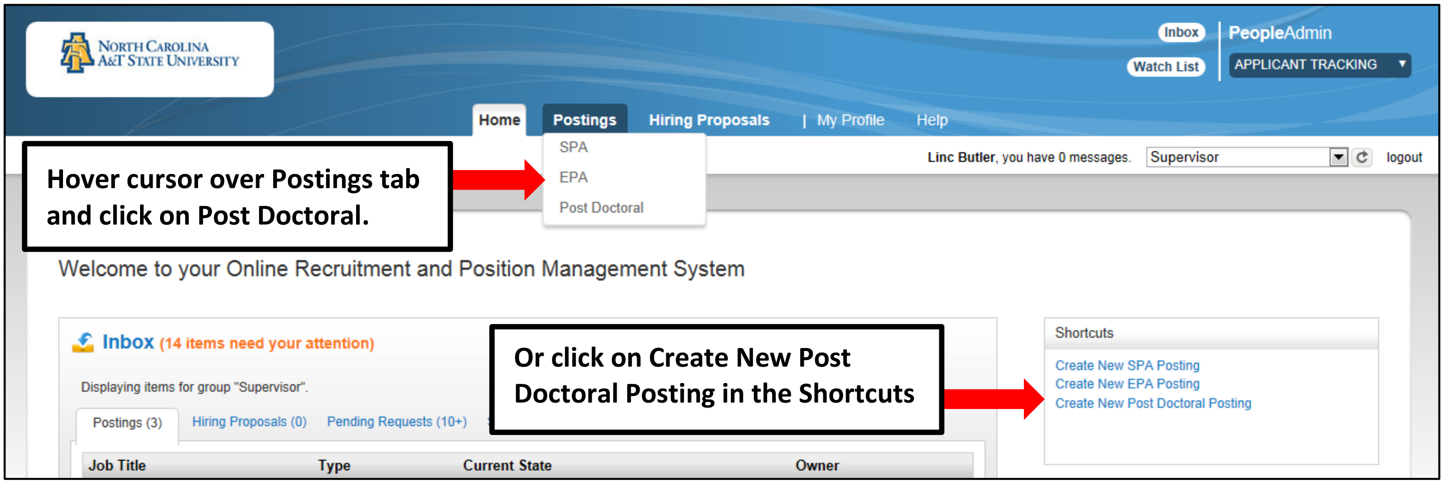
4) Add any Comments into the window that opens (below) as notes to yourself, if desired.
5) Click “Submit”



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

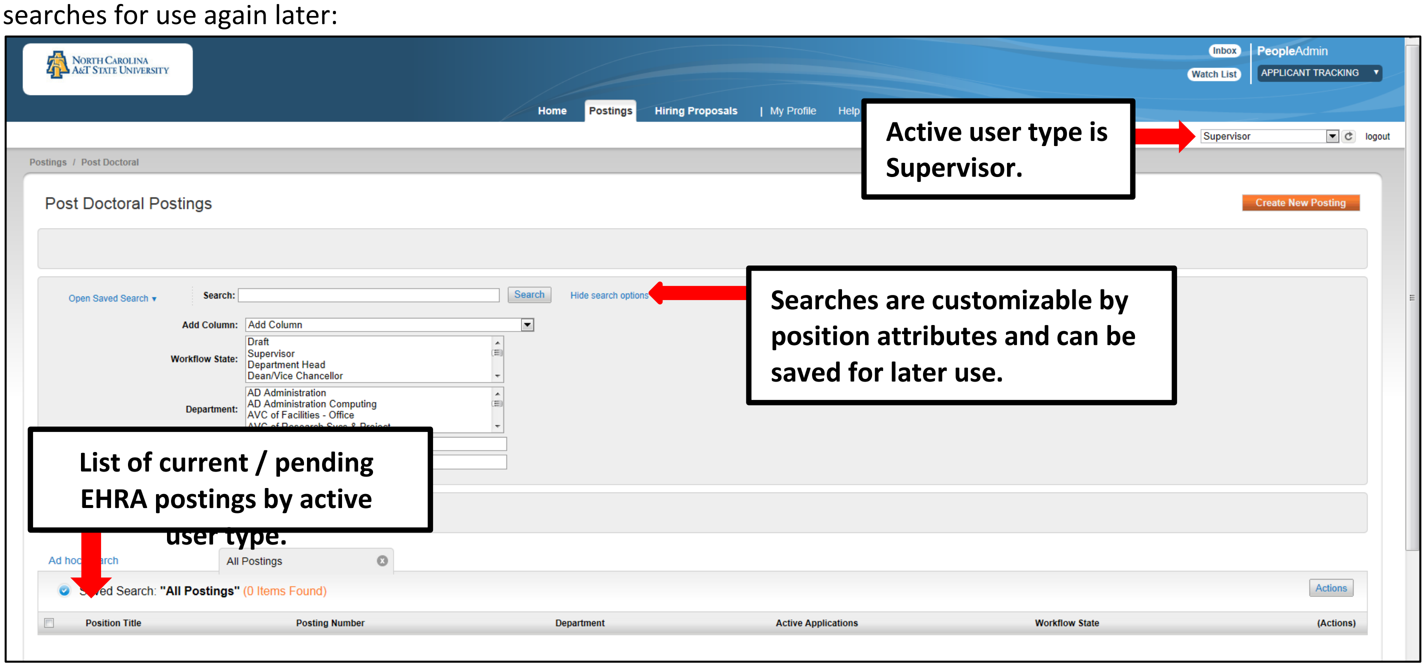
To initiate a **Create New Post Doctoral Posting** request, hover your cursor over the **Postings** tab and click on “Post Doctoral”, or click on the **Create New Post Doctoral Posting** link located in the **Shortcuts** menu to the right of your **Inbox**:



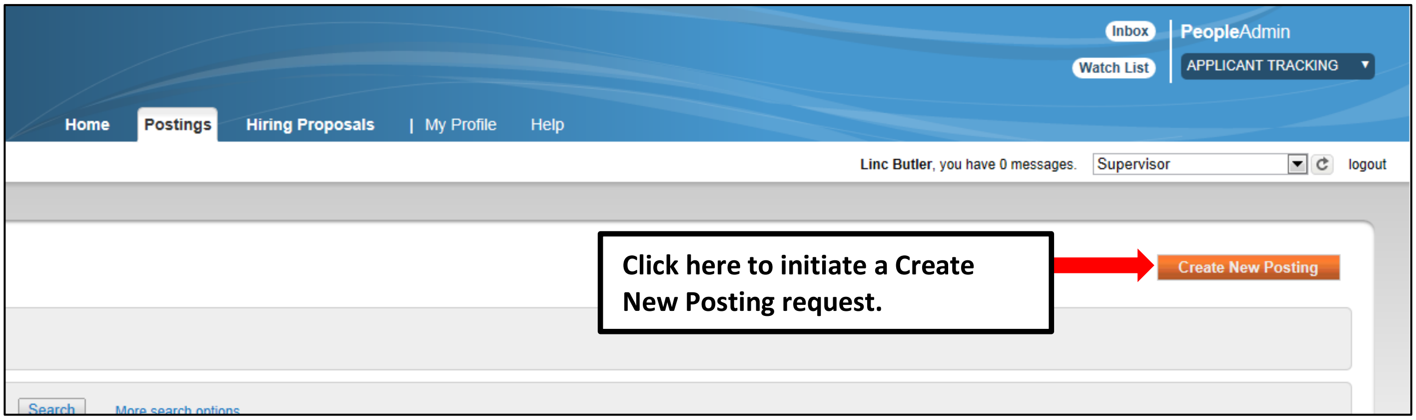
You will then be taken to the **EHRA Postings** view, which provides a list of all current/pending EHRA postings initiated based on your active user type as follows:

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:



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:



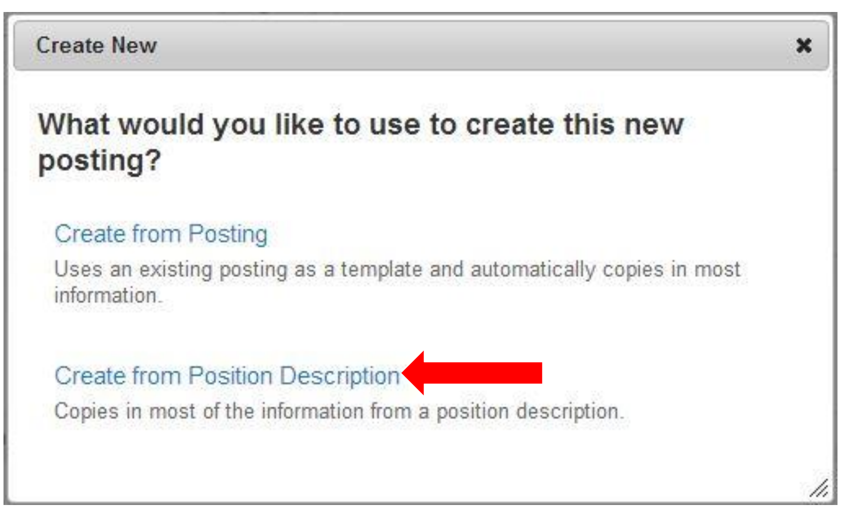
You will then see the **Create New** menu, asking what you would like to use to create the new posting:

Create New Post Doctoral Posting from an Existing Posting

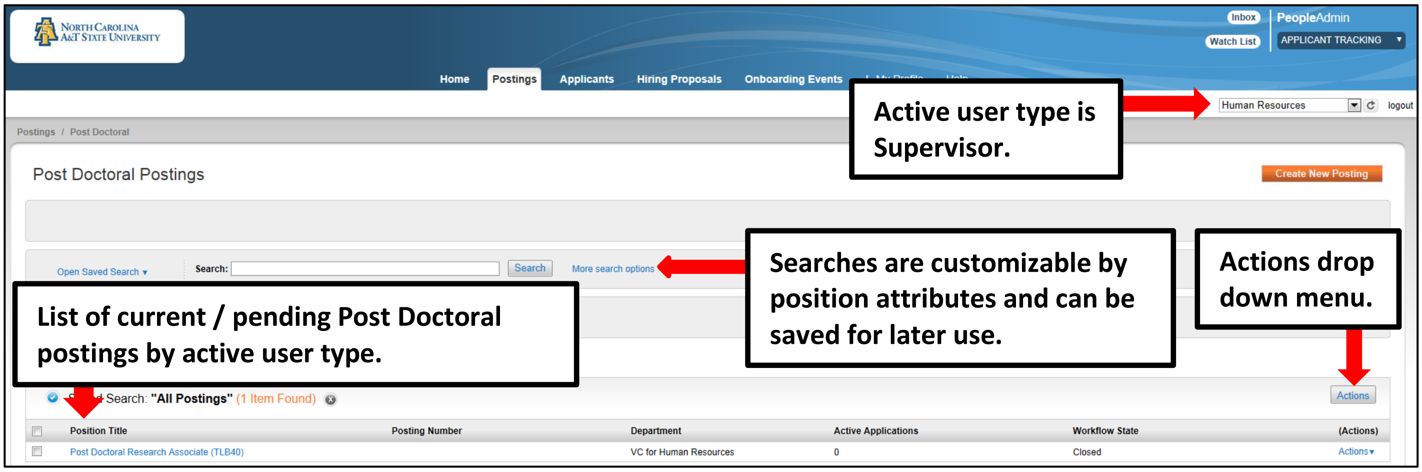
Select **Create from Posting** if you wish to create a posting using information from a prior posting that has previously been used in the PeopleAdmin system.

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.

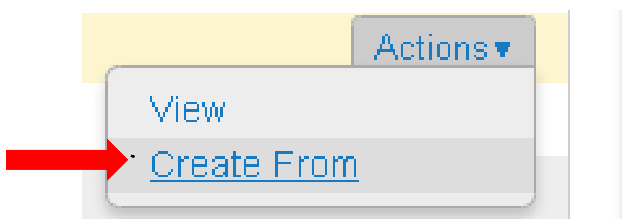
Choosing the **Create from Posting** option copies information from a prior posting into a new posting:



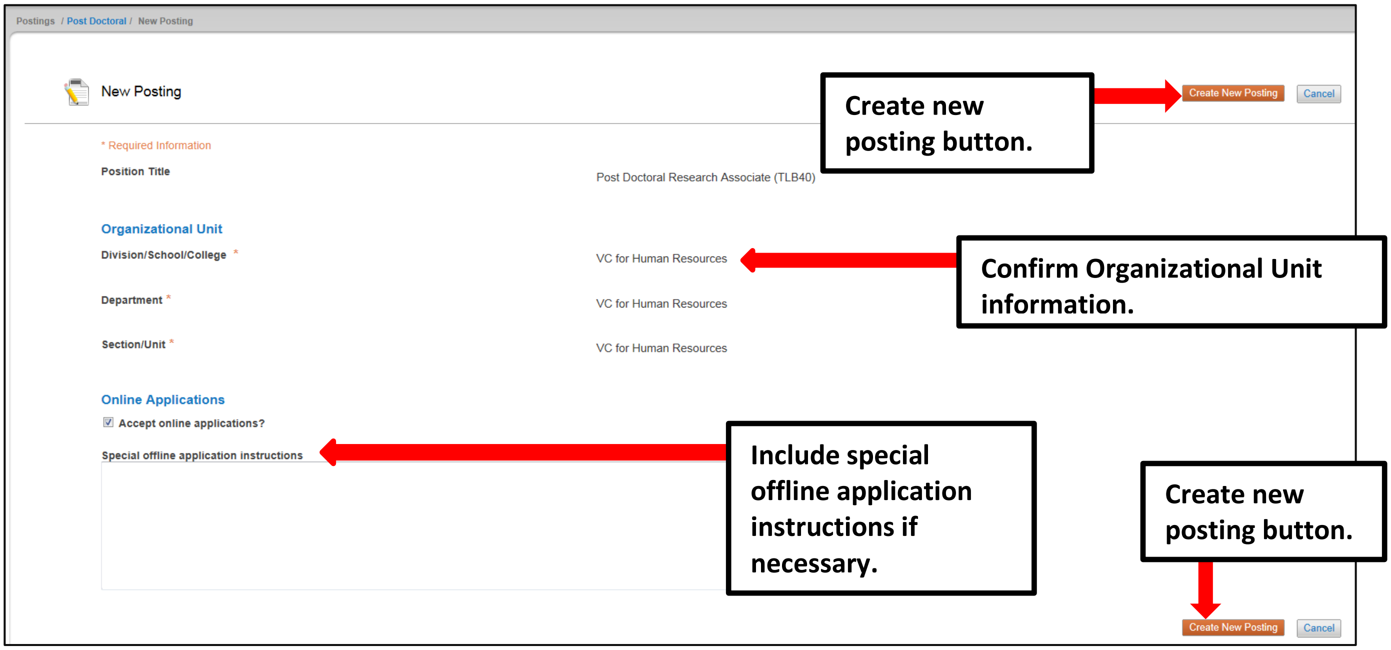
After clicking on **Create from Posting,** you will be taken to the **Post Doctoral Postings** view, where you can search any current or pending postings by any number of criteria, including but not limited to position title, posting number, position number, department name, or supervisor name. Searches 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 [Classification and Compensation Analyst]() in the Division of Human Resources:



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:**



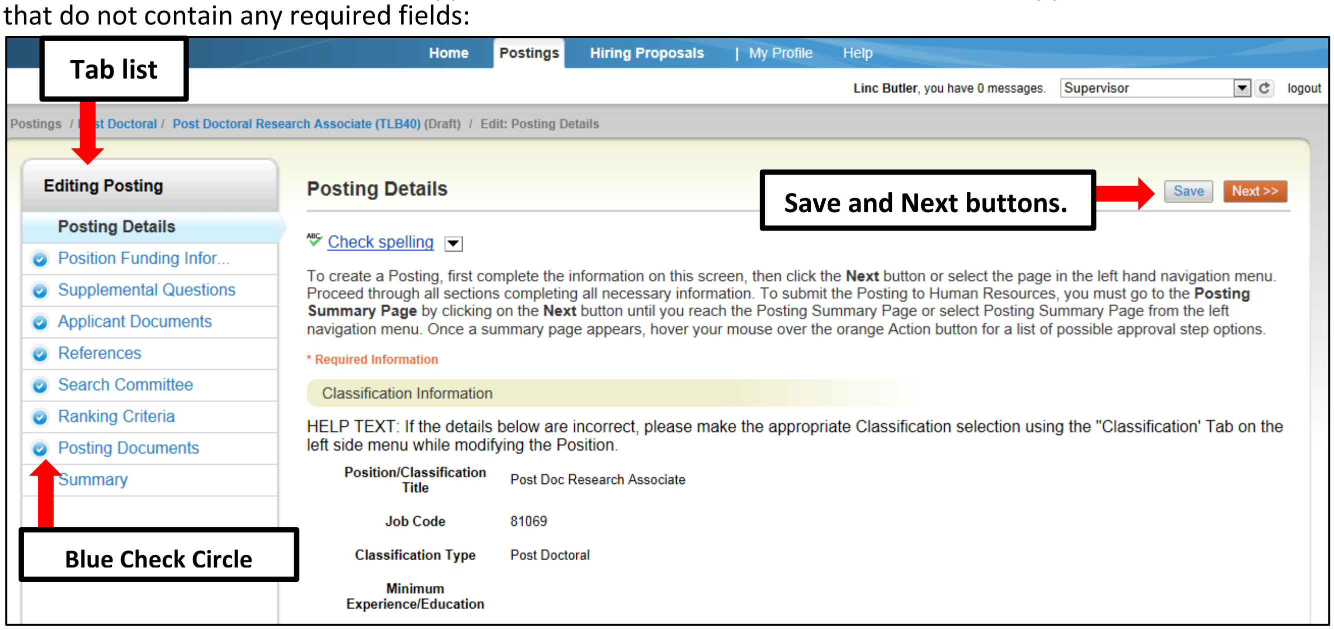
By clicking **Create From**, the **New Posting** form will appear. This is where you can update the working title of the position for the purpose of posting, and view **Organizational Unit** information to confirm accuracy. You can also provide **Special Offline Application Instructions** in the field 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:



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.

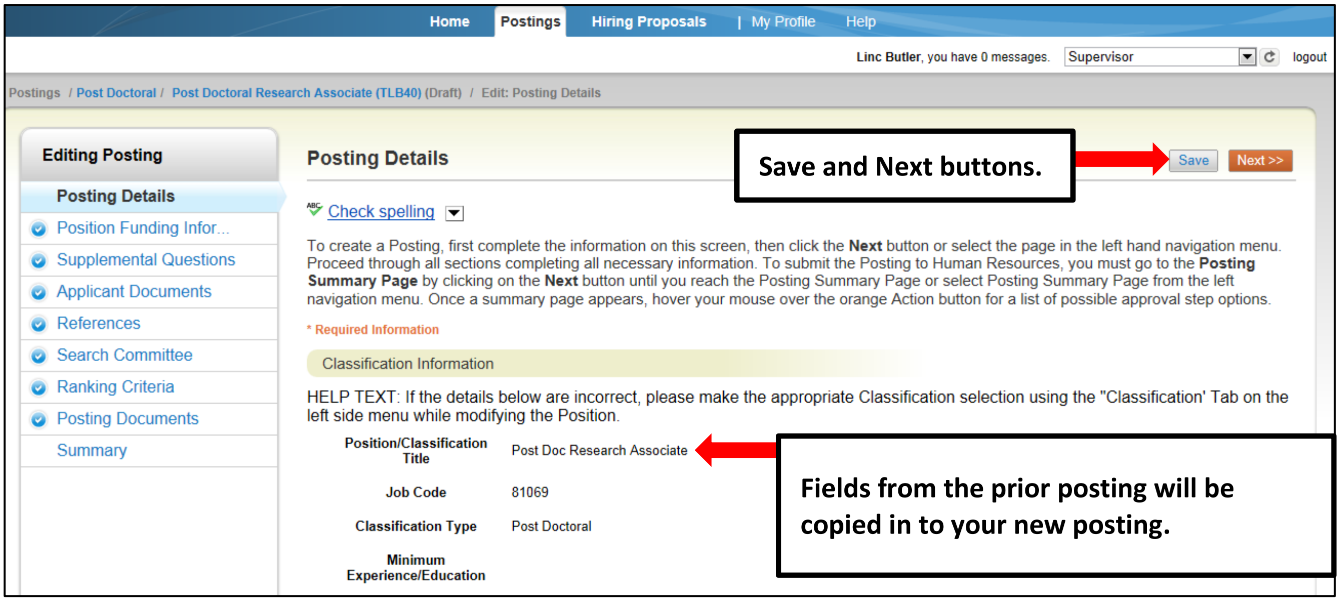
You can save the changes you've made to the active tab you're working on and navigate to the next tab in the list simultaneously by clicking the Next >> button located in both the top and bottom right corners of the page. You can save the active tab you're working on and stay on the same tab by clicking 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.

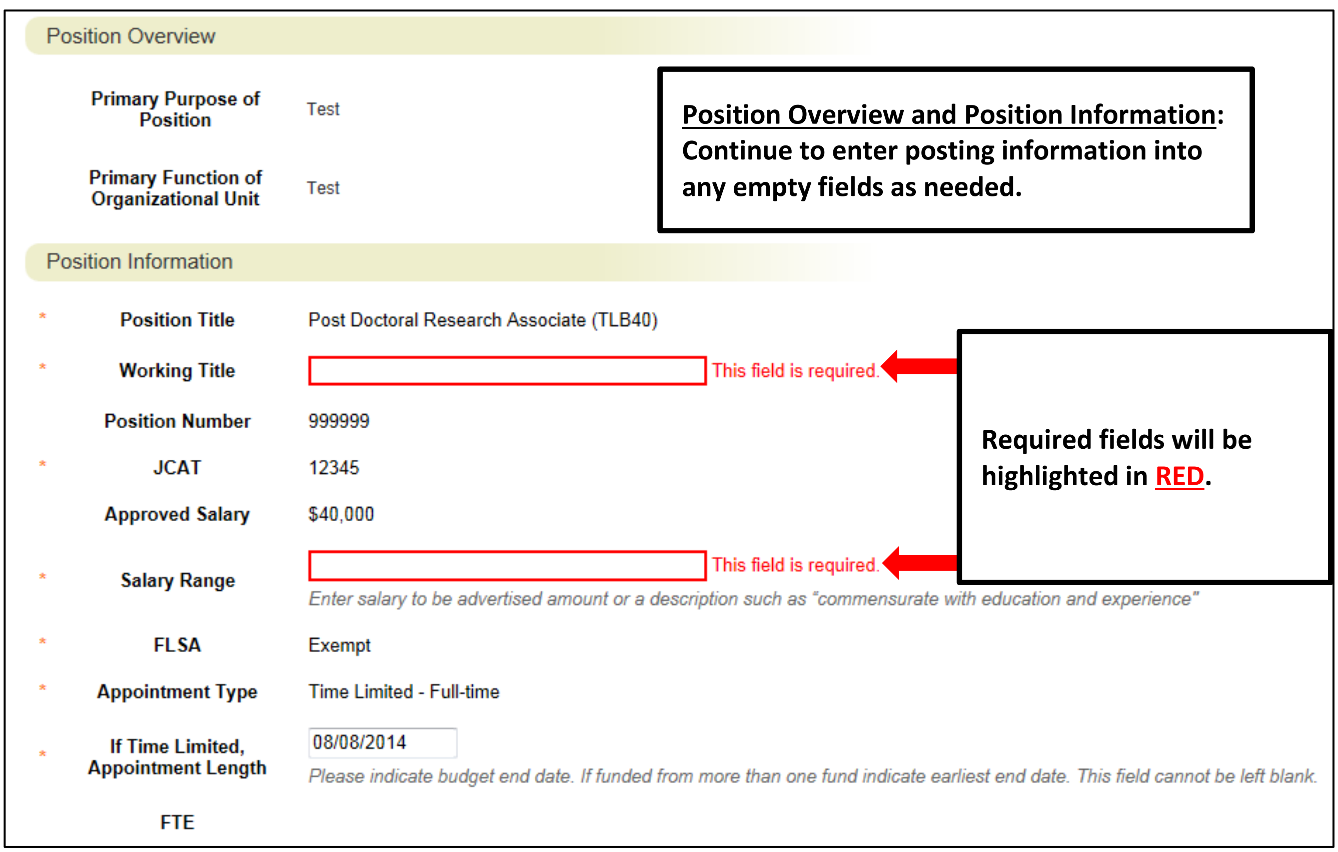
Required fields are highlighted in **red** and must be filled in before the new **Post Doctoral Posting** can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check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



Create New Post Doctoral Posting from an Existing Posting – Posting Details Tab

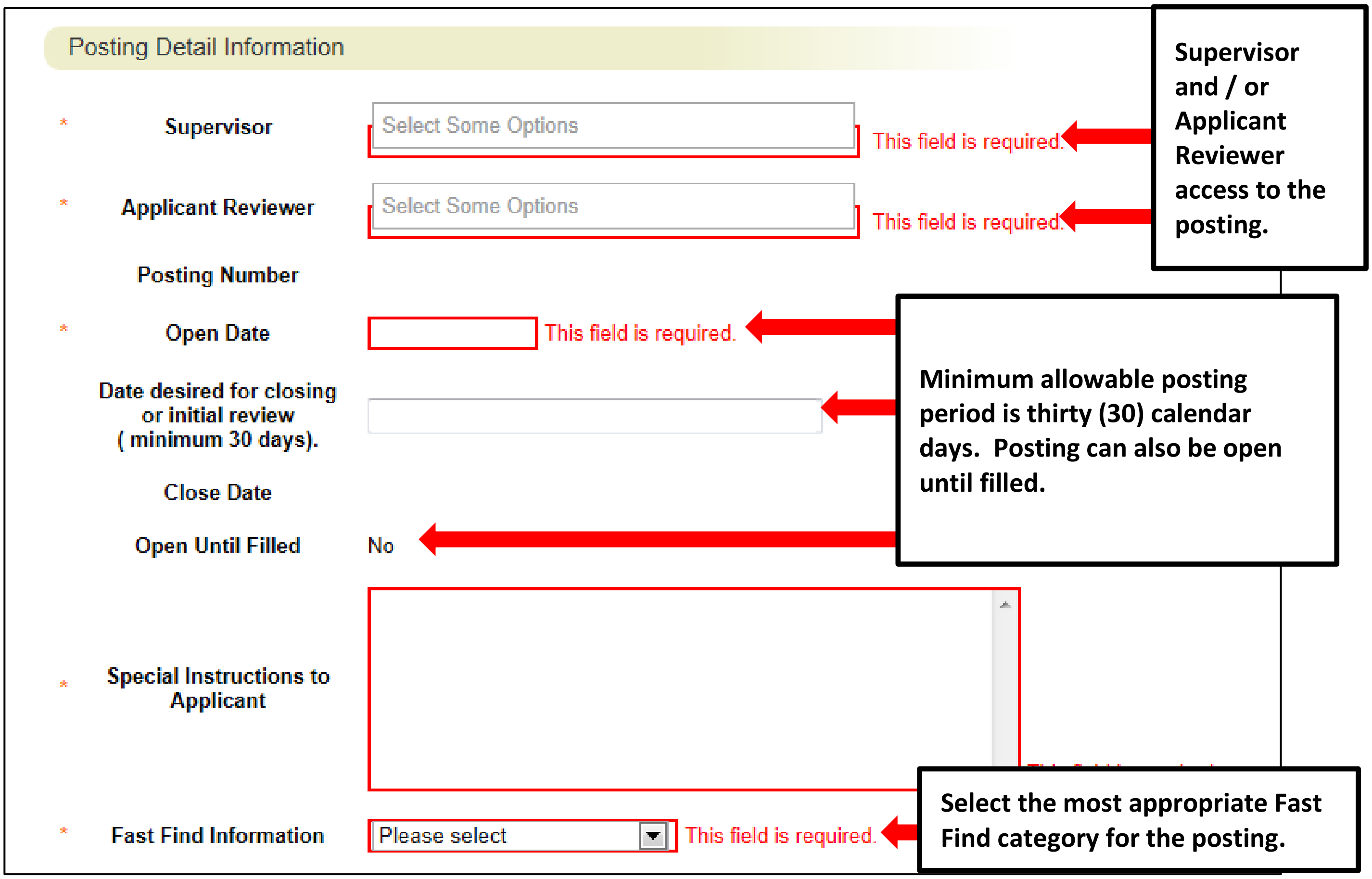
Since you are creating a new **Post Doctoral Posting** from a prior posting, many of the fields will already be filled in with information copied from the prior posting. Follow the instructions at the top of the page to complete any remaining required fields, then click the Next >> button to save changes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



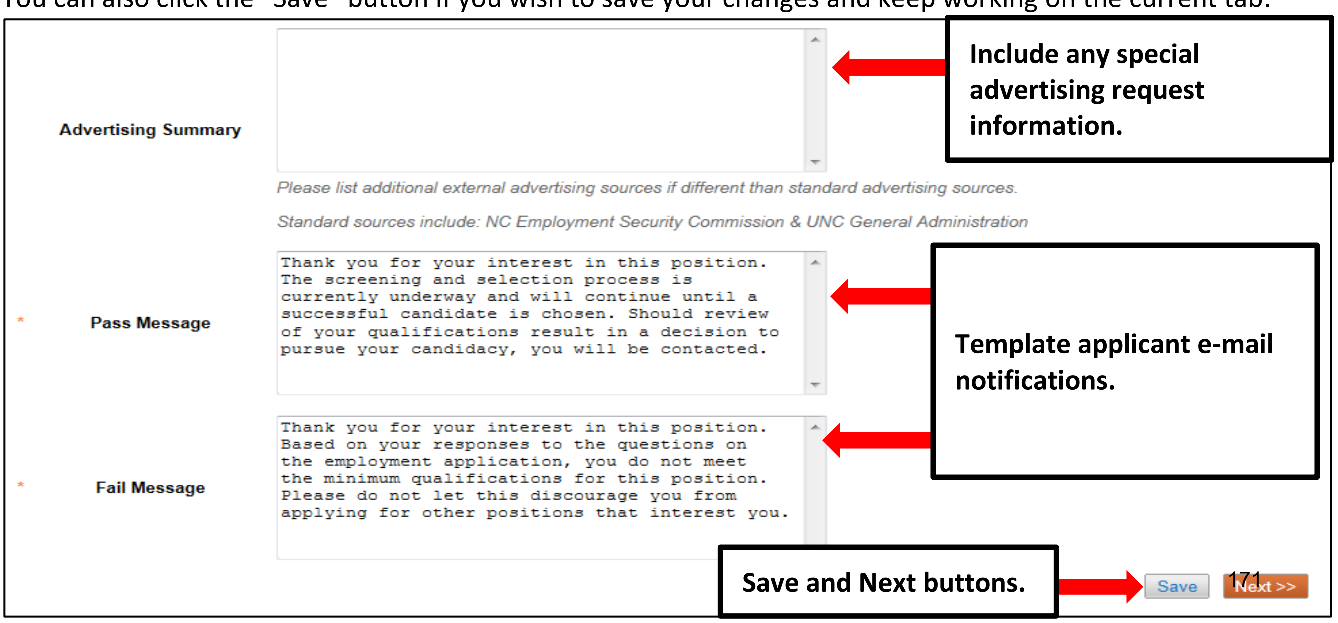


You can indicate other users you would like to have **Supervisor** and / or **Applicant Reviewer** access to the posting by searching for their name in the Supervisor and Applicant Reviewer fields. Indicate the proposed **Open Date** and **Date Desired for Closing or Initial Review (minimum 30 days)**, 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:

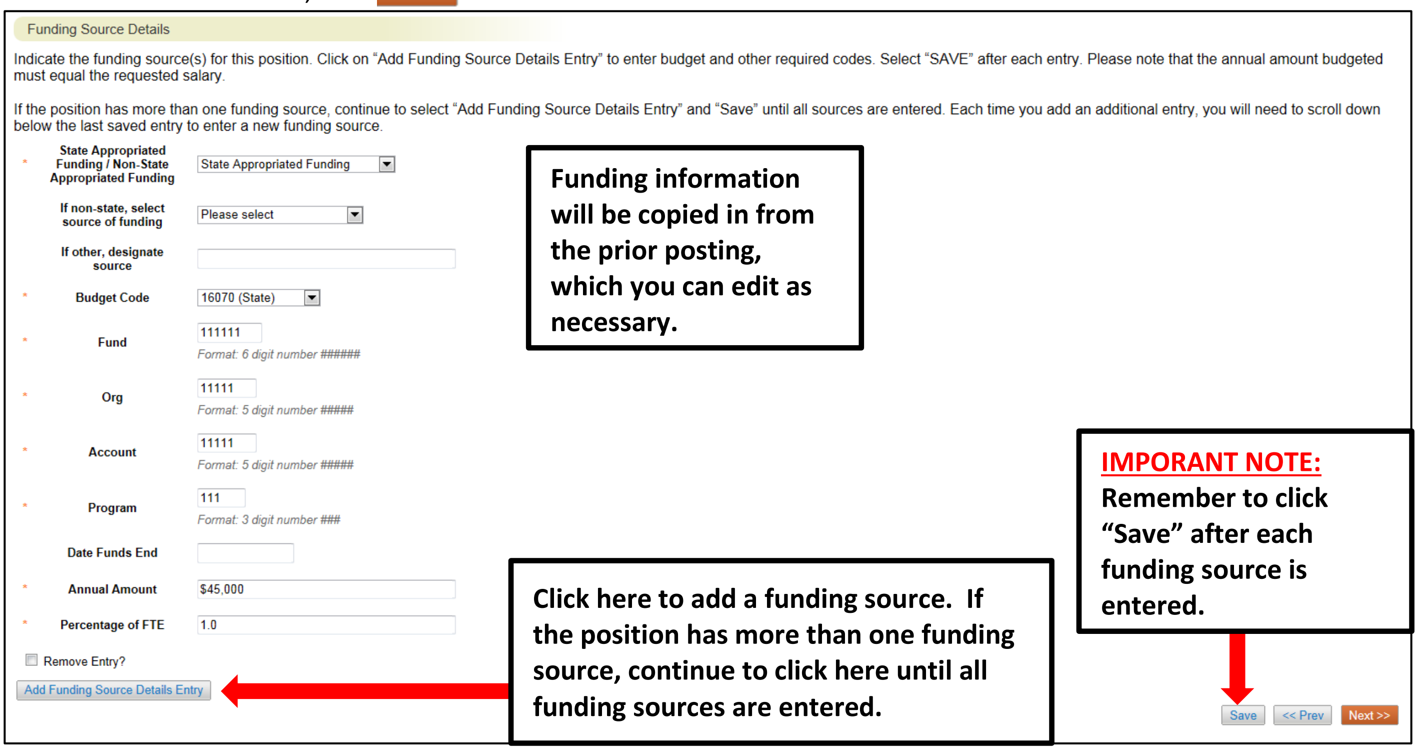


Create New Post Doctoral Posting from an Existing Posting – Position Funding Information Tab

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(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
If non-state, select source of funding	Please select
If other, designate source	
* 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 Details Entry

Funding information will be copied in from the prior posting, which you can edit as necessary.

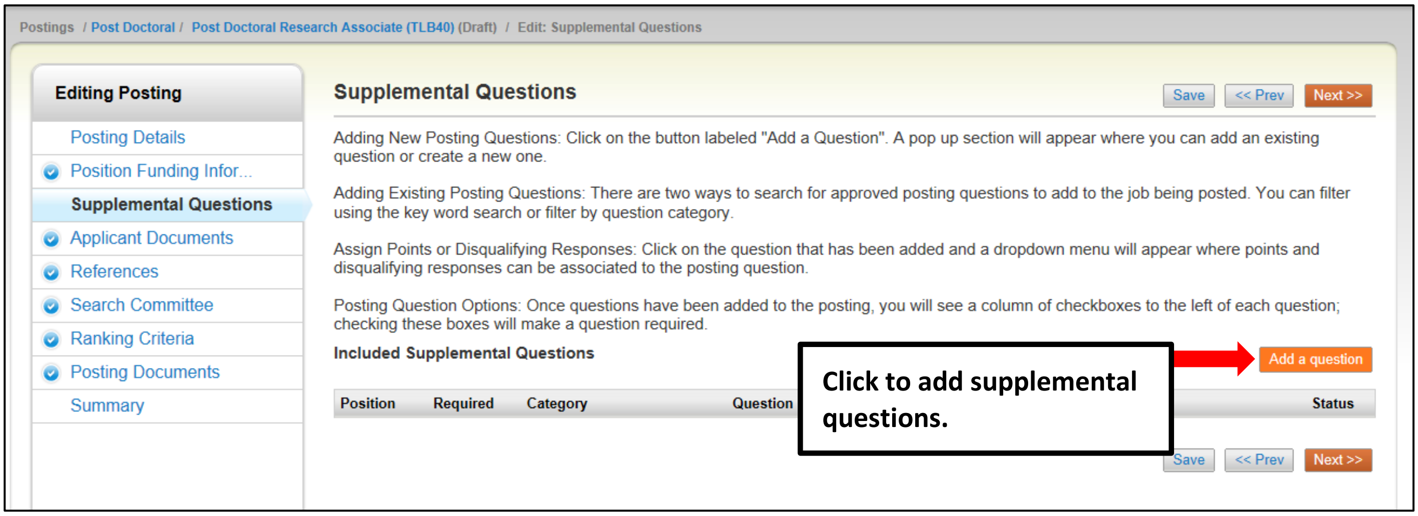
Click here to add a funding source. If the position has more than one funding source, continue to click here until all funding sources are entered.

IMPORANT NOTE: Remember to click "Save" after each funding source is entered.

Save | << Prev | Next >>

Create New Post Doctoral Posting from an Existing Posting – Supplemental Questions Tab

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:



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.

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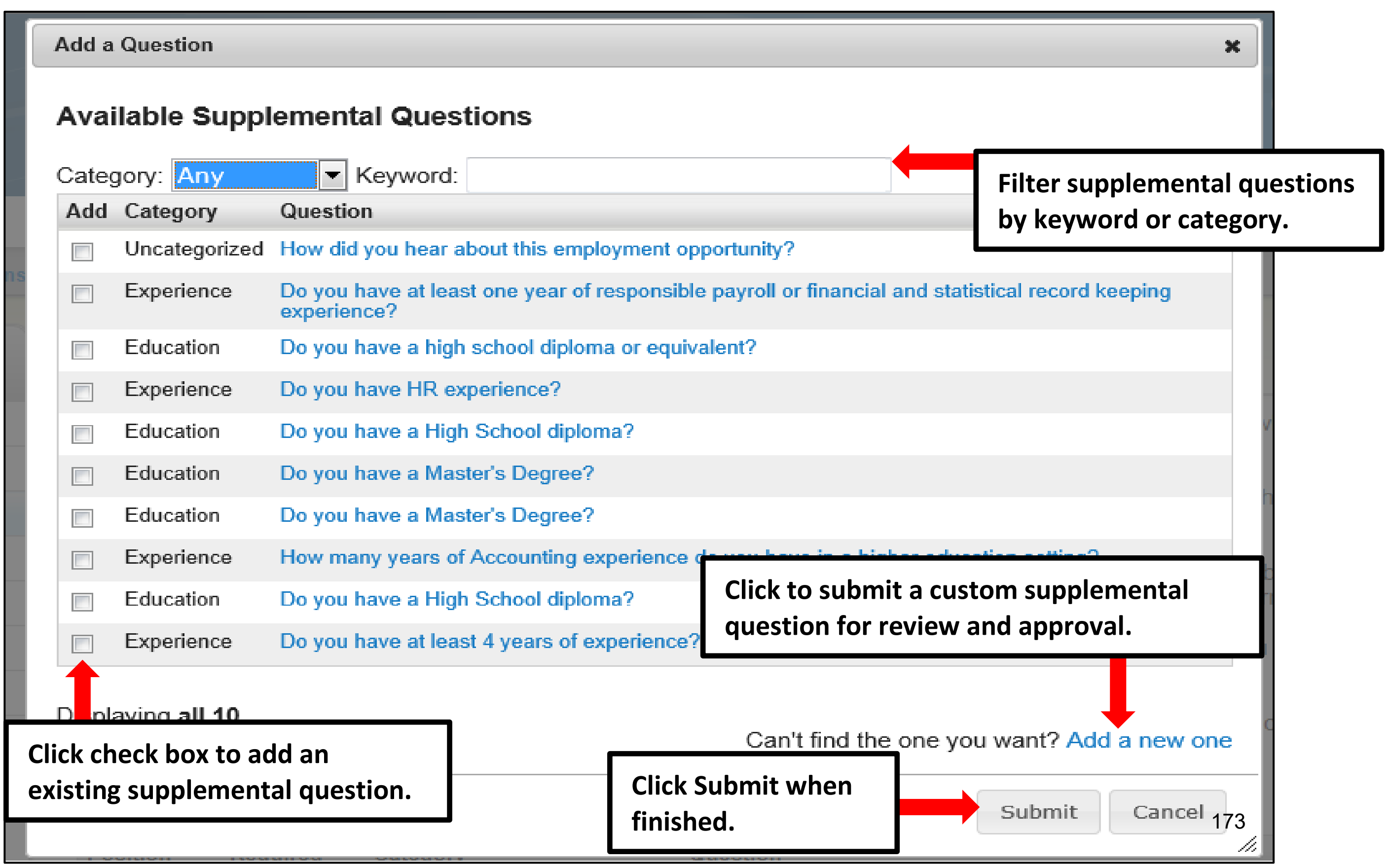

Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear where points and disqualifying responses can be associated to the posting question.

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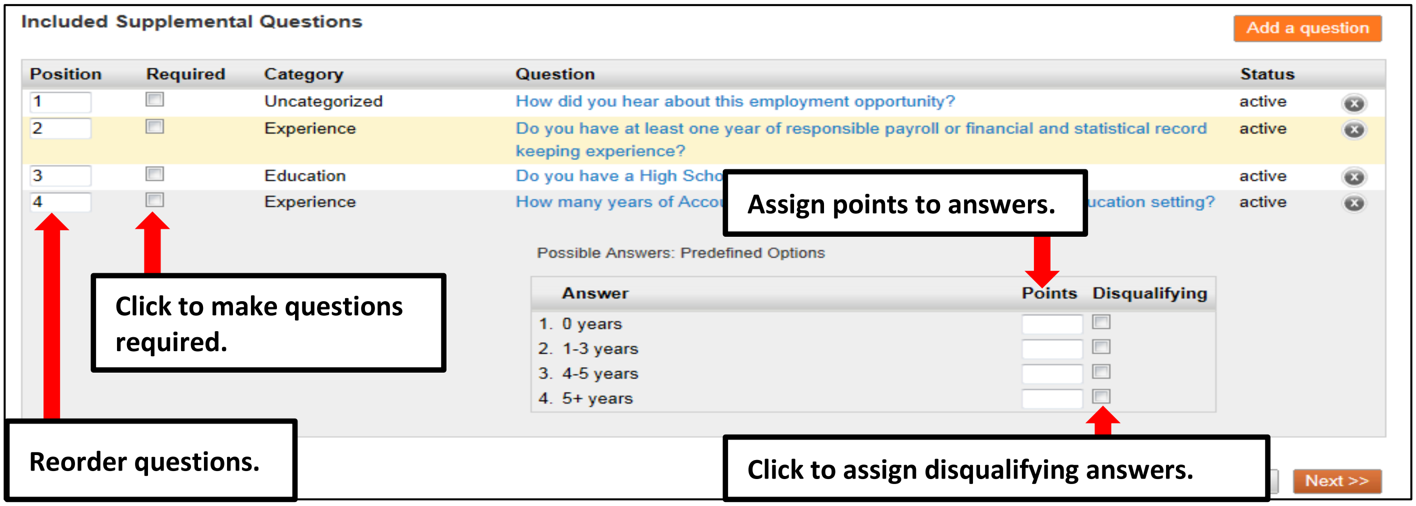

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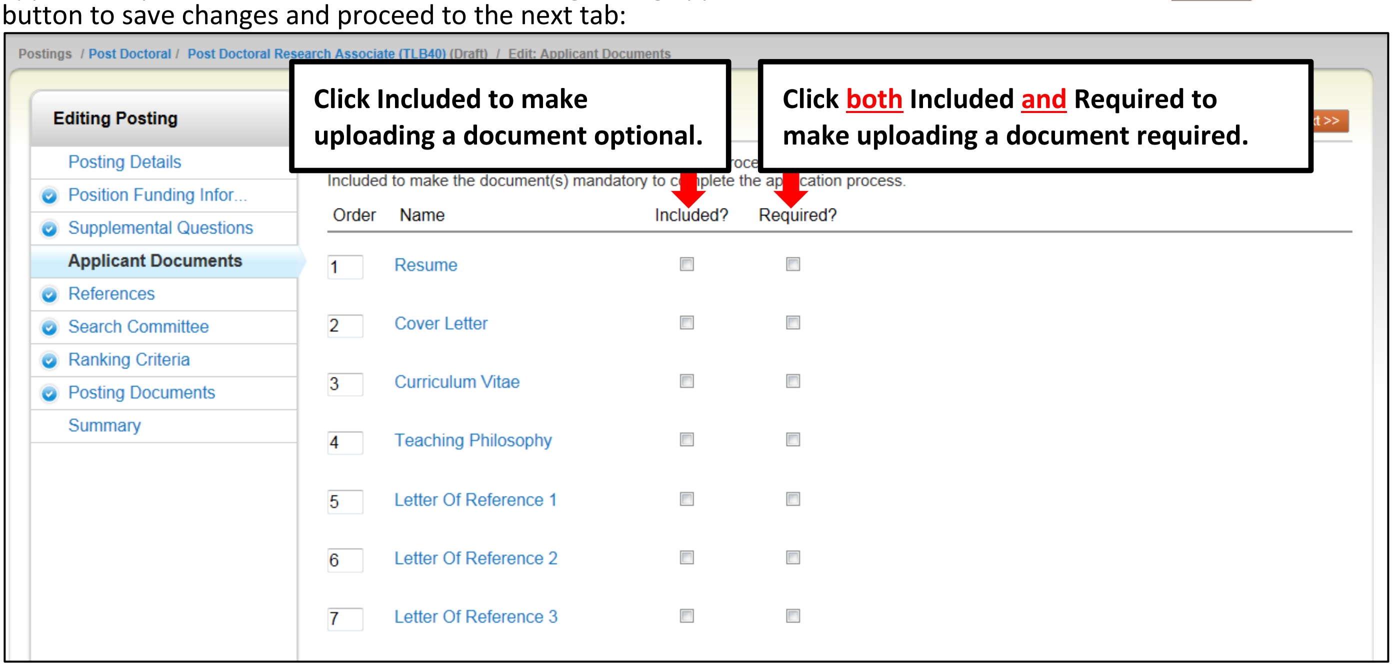
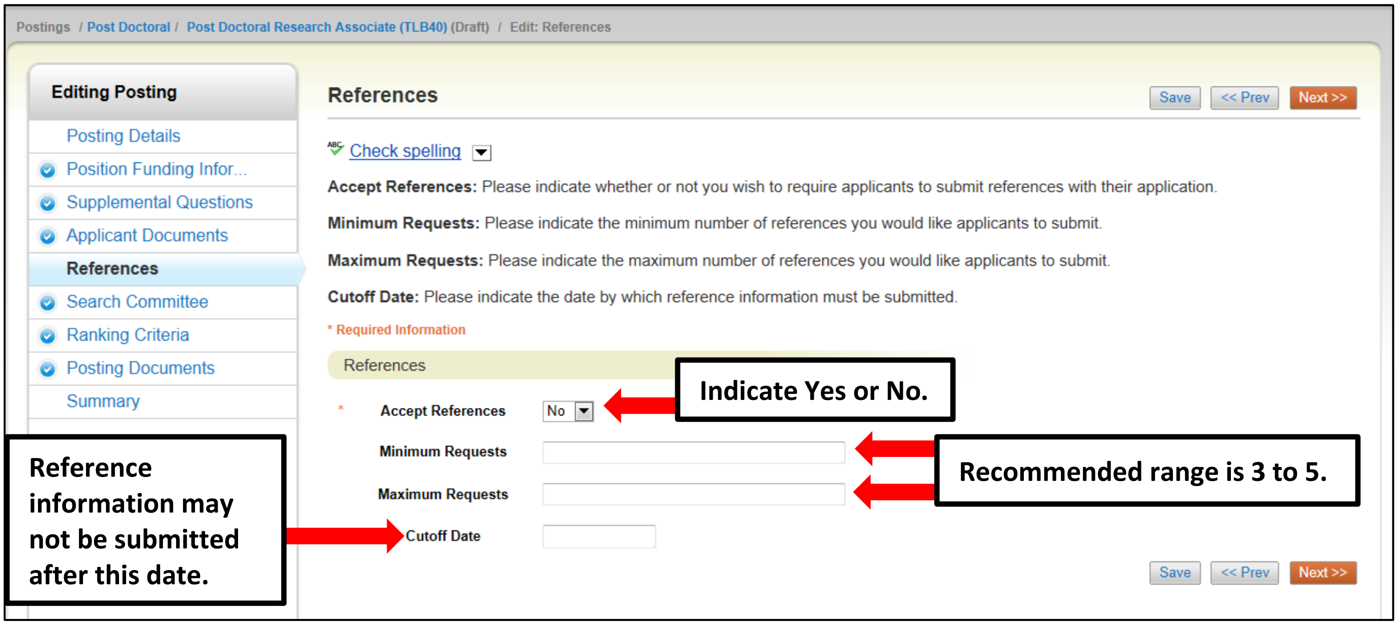


Create New Post Doctoral Posting from an Existing Posting – References / Letters of Recommendation Tab

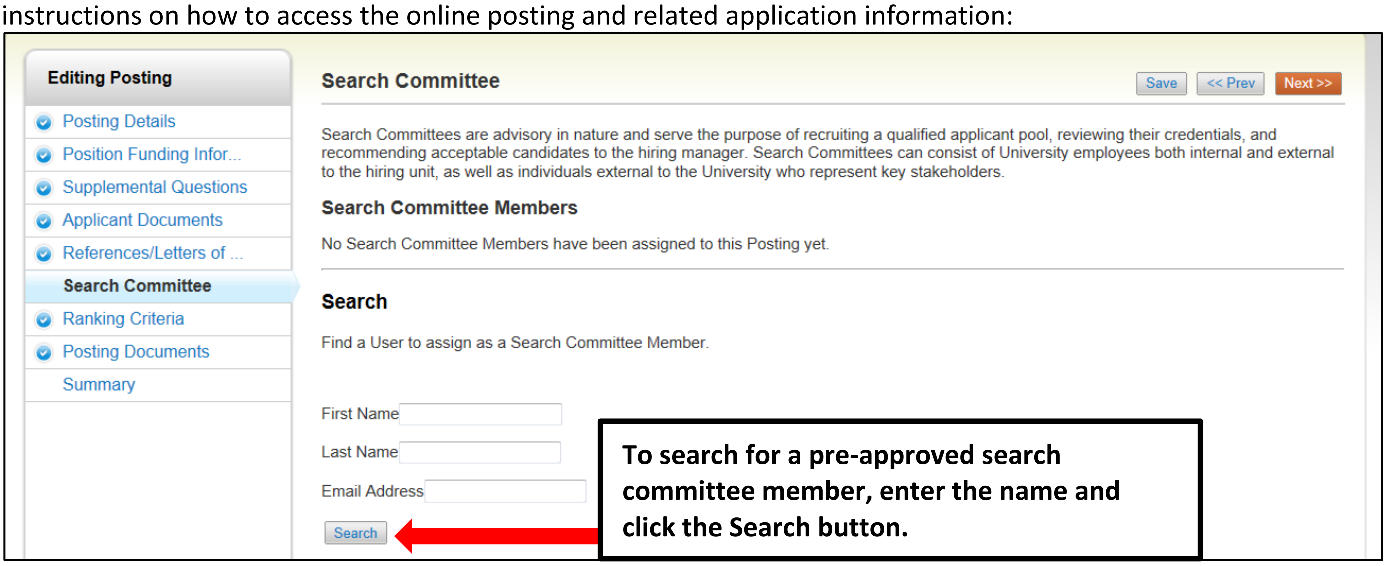
In the **References / Letters of Recommendation** tab, you can indicate whether or not you wish to require applicants to submit references with their application. You can also indicate the minimum and maximum number of references you would like applicants to submit, and the cutoff date by which reference information must be submitted:



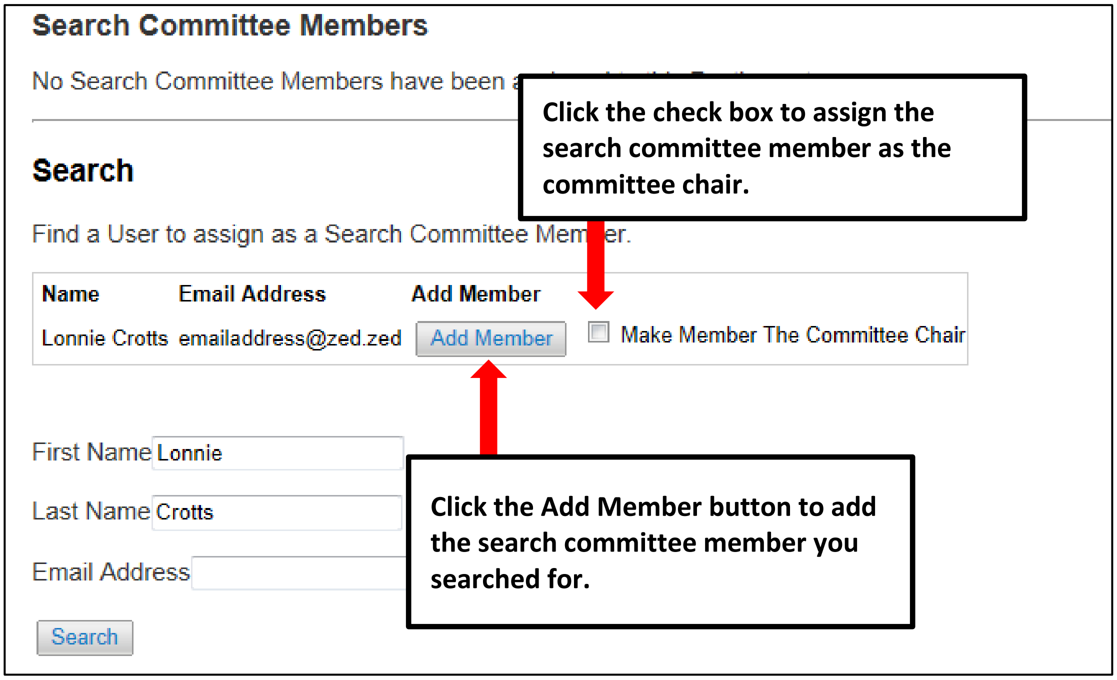
Create New Post Doctoral Posting from an Existing Posting – Search Committee Tab

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.

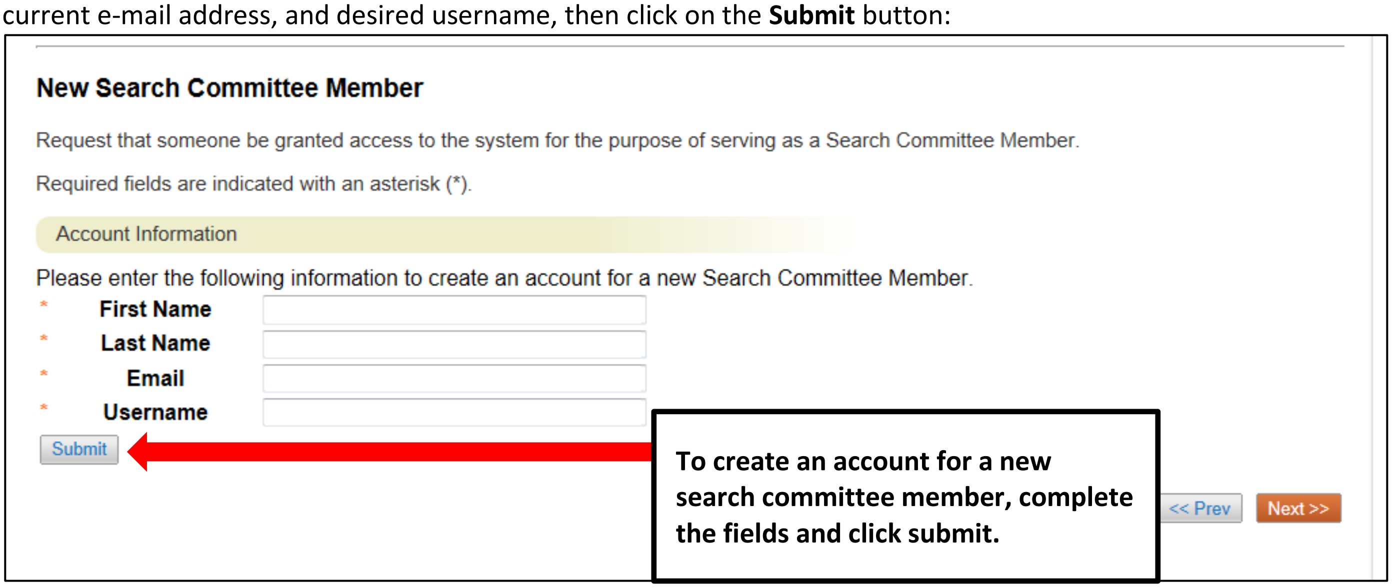
In the **Search Committee** tab, you can assign search committee members who will have access to review application information for a specific posting. Search committee members can view applications, applicant documents, and evaluate / rank applicants based upon ranking criteria you establish as part 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:



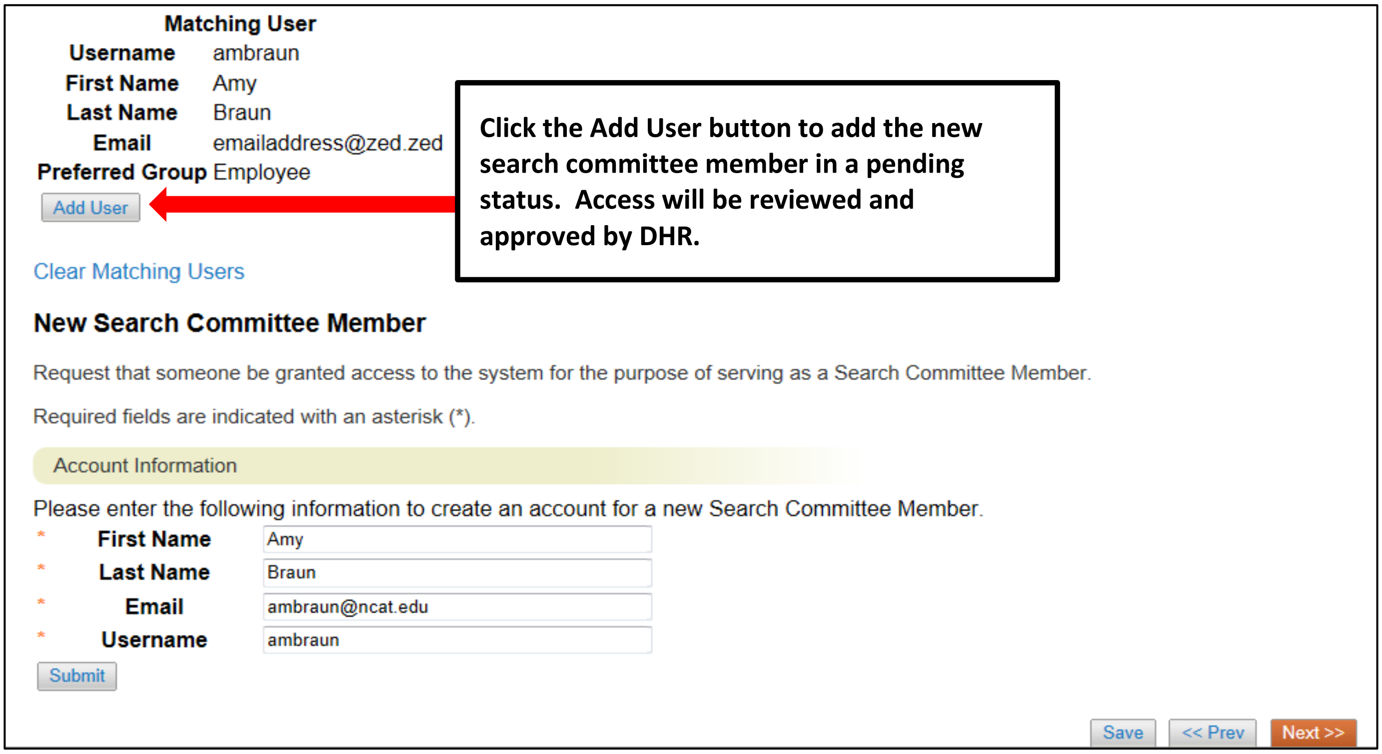
After searching for a pre-approved search committee member, click on the **Add Member** button to add them to your search committee. You can also make a search committee member the chair of the search committee by clicking on the check box next to **"Make Member the Committee Chair"**:



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:

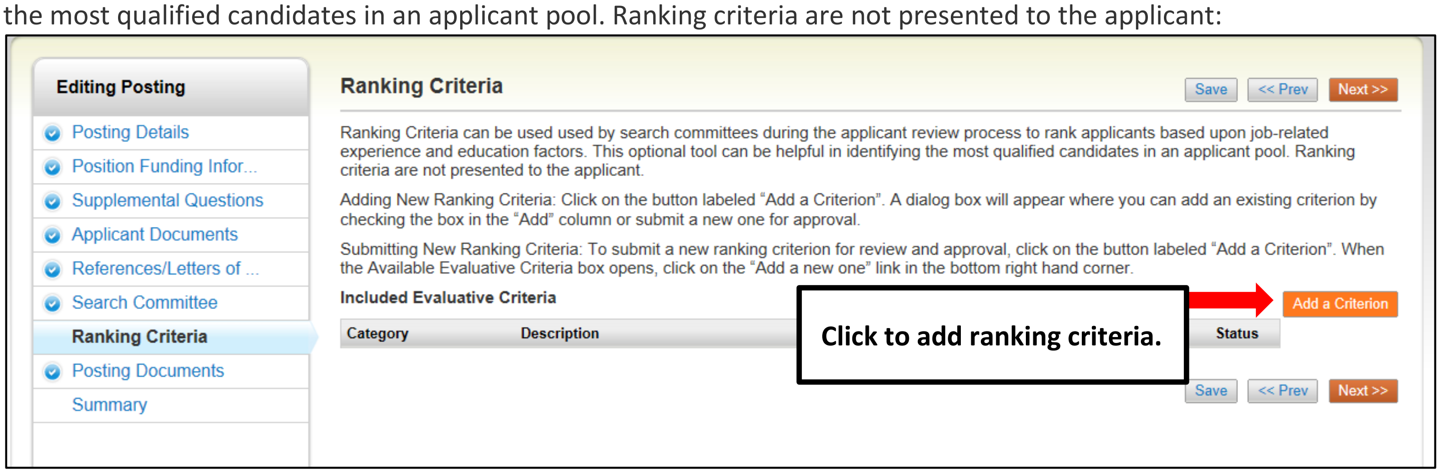


If the requested search committee member is already an assigned user of the PeopleAdmin system, their user account information will be displayed, and you can add them to your search committee by clicking on the **Add User** button:

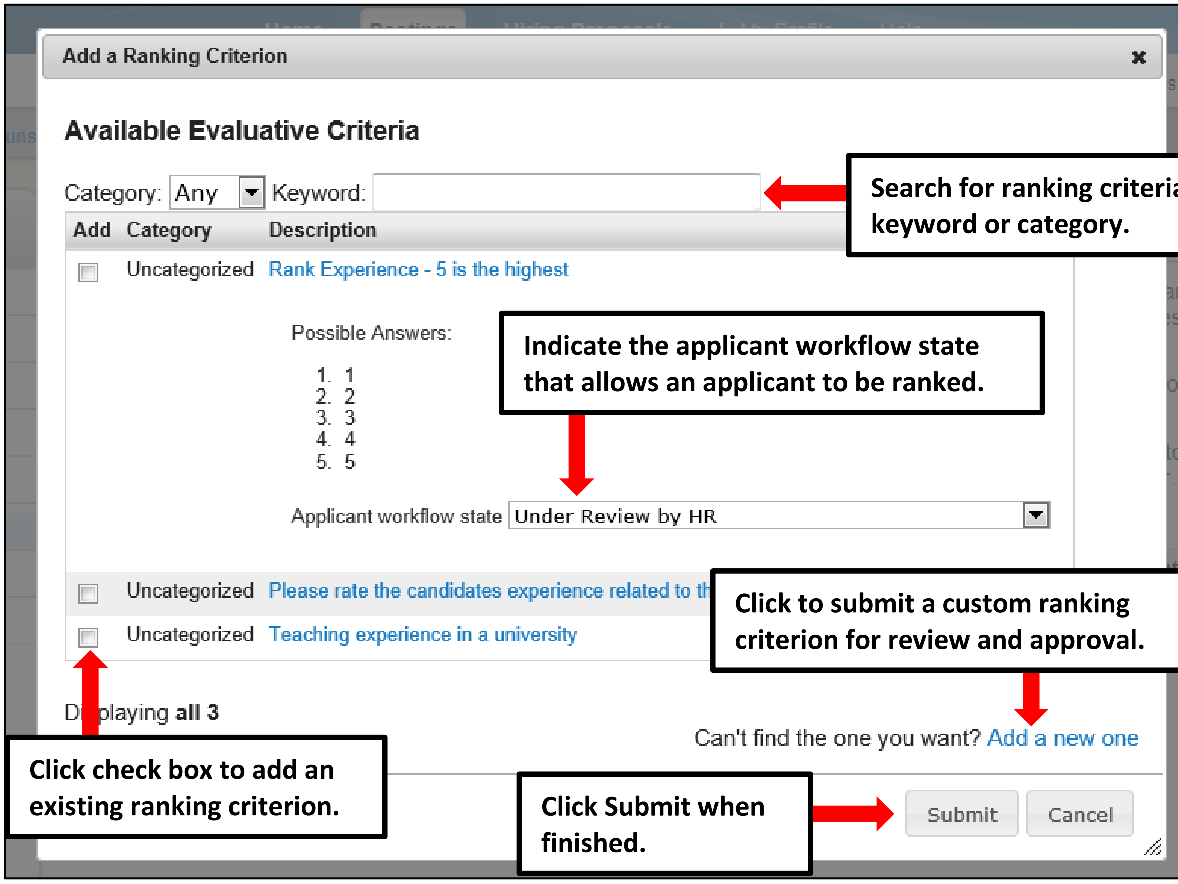


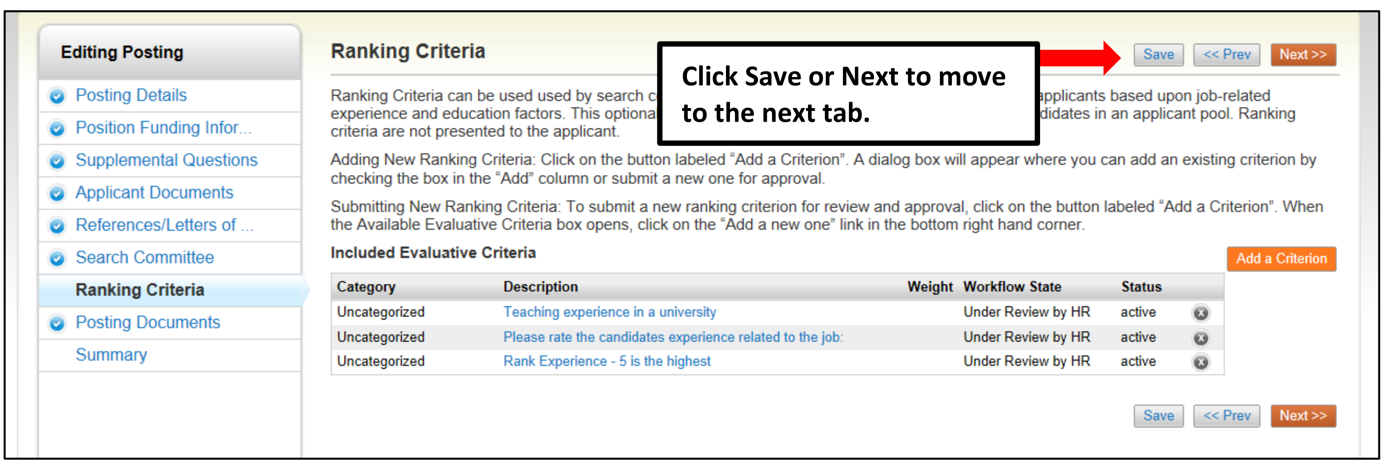
Create New Post Doctoral Posting from an Existing Posting – Ranking Criteria Tab

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:



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:



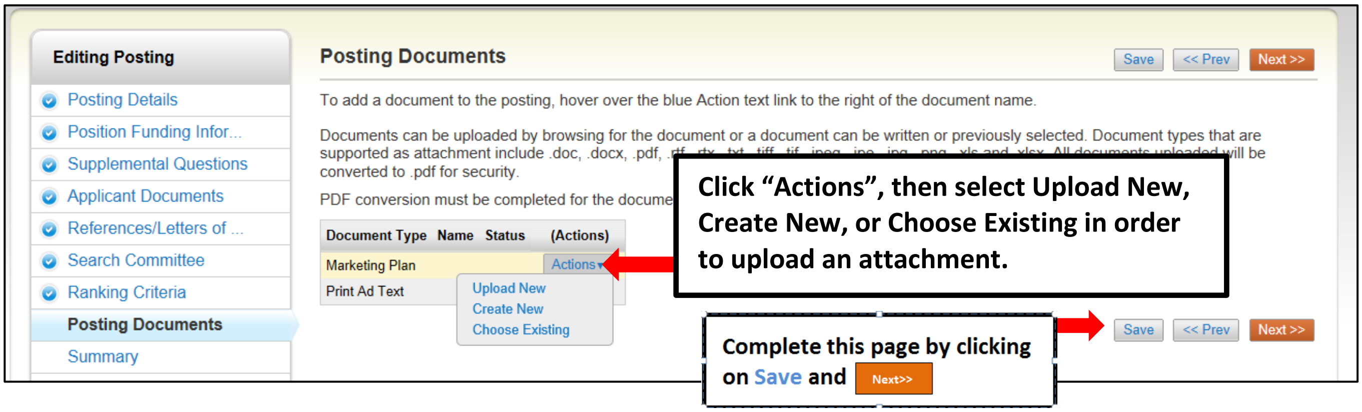


[Create New Post Doctoral Posting from an Existing Posting – Posting Documents Tab]

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.

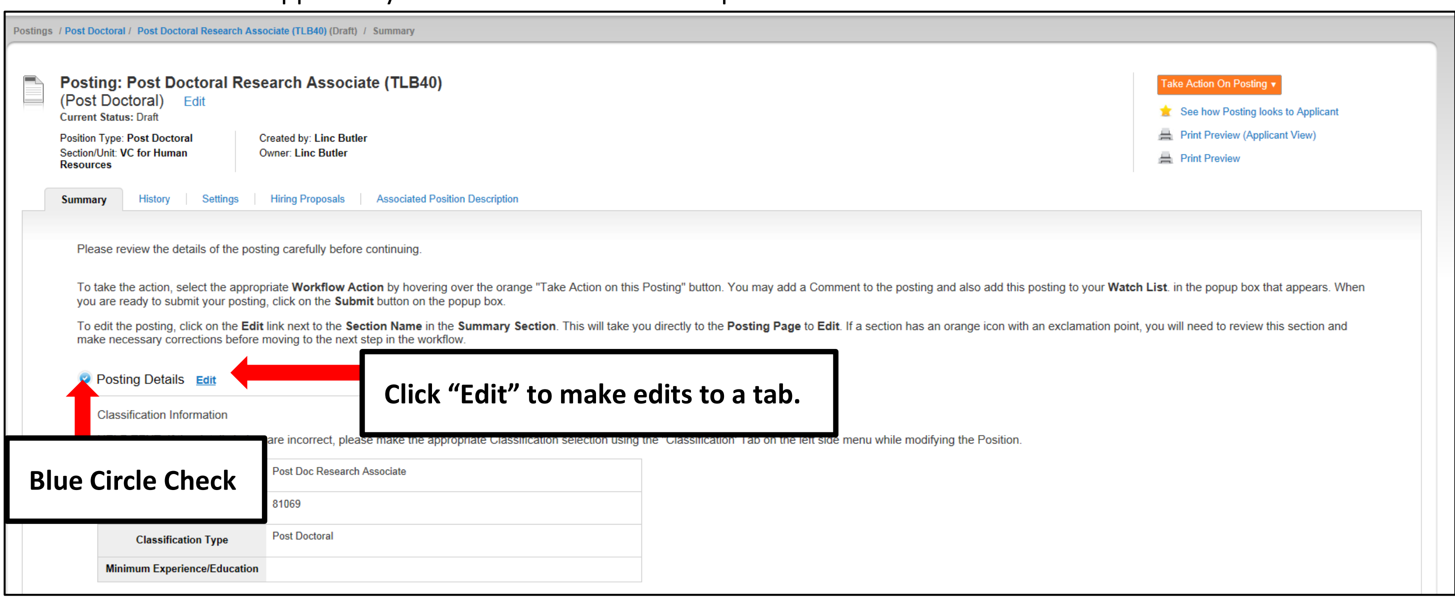
Excel and Word documents may be attached.   PDF conversion must be completed for the document to be valid when applicable:



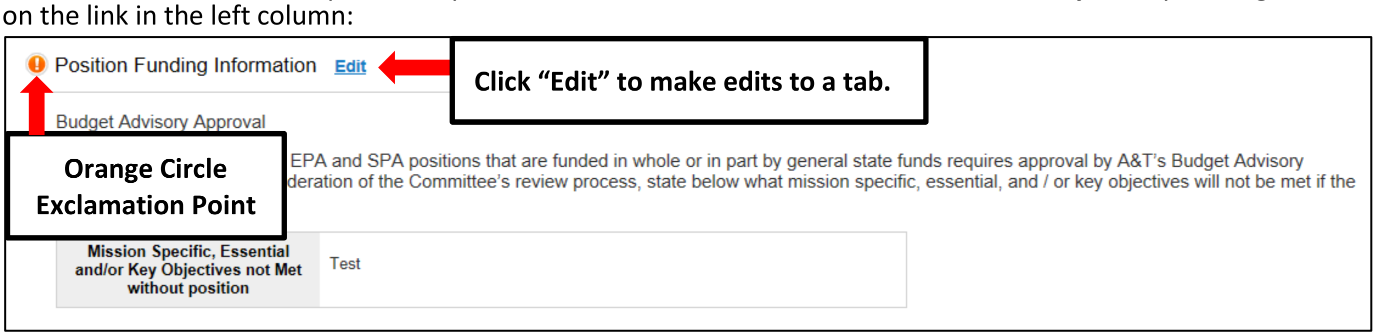
Create New Post Doctoral Posting from an Existing Posting – Summary Tab

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.

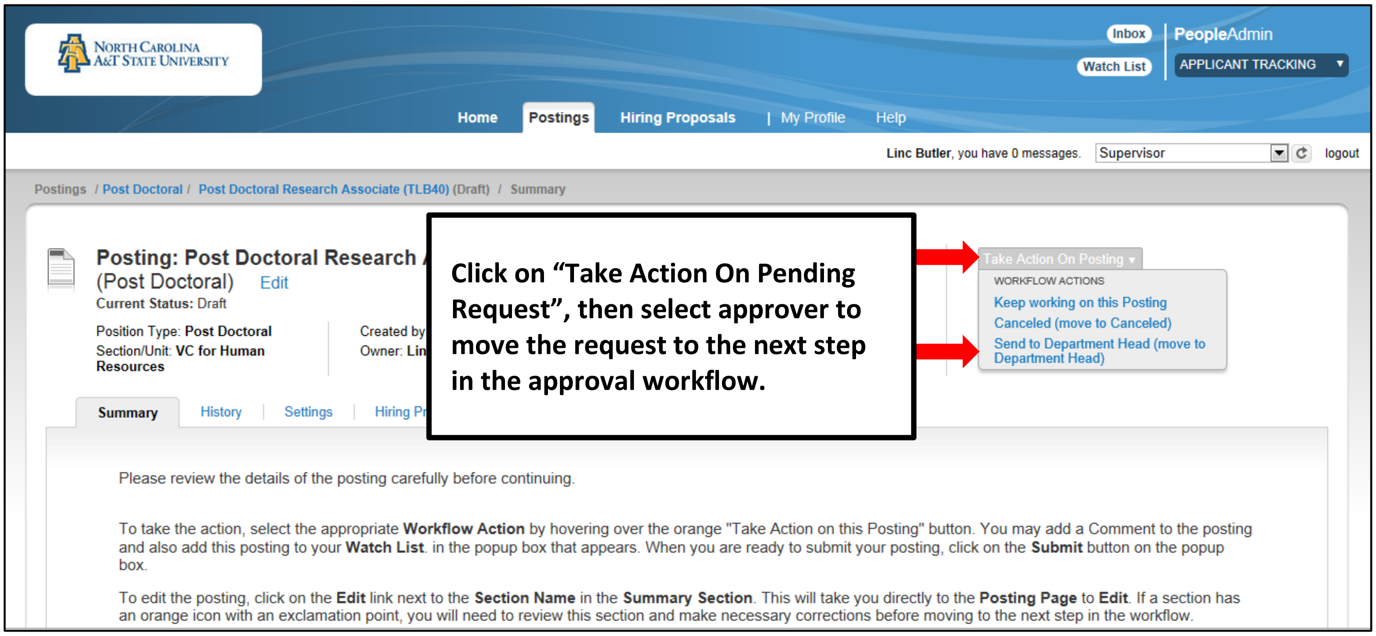
The **Blue Circle Check** appears by those tabs for which all required information has been entered:



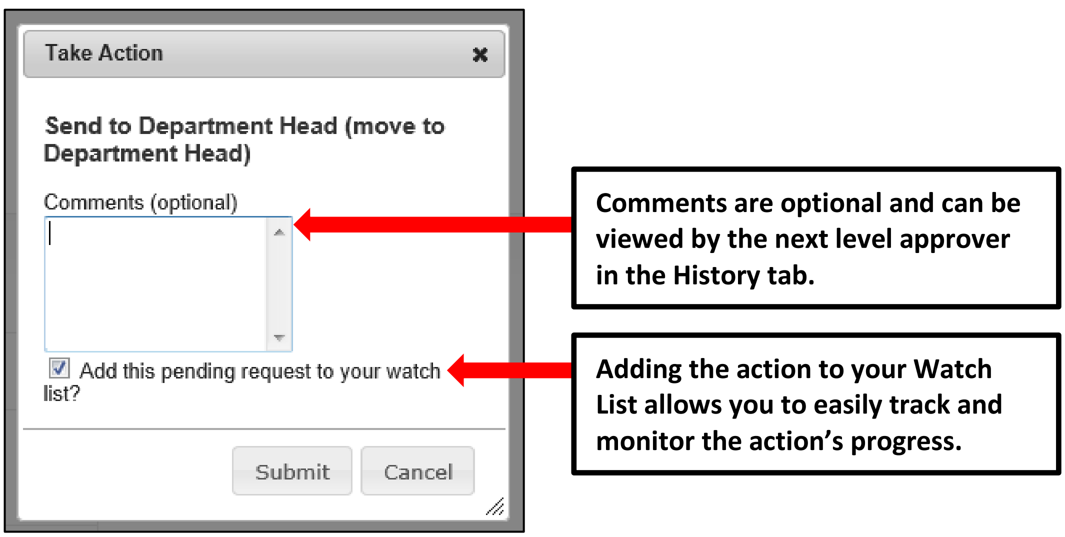
An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save",** and then return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



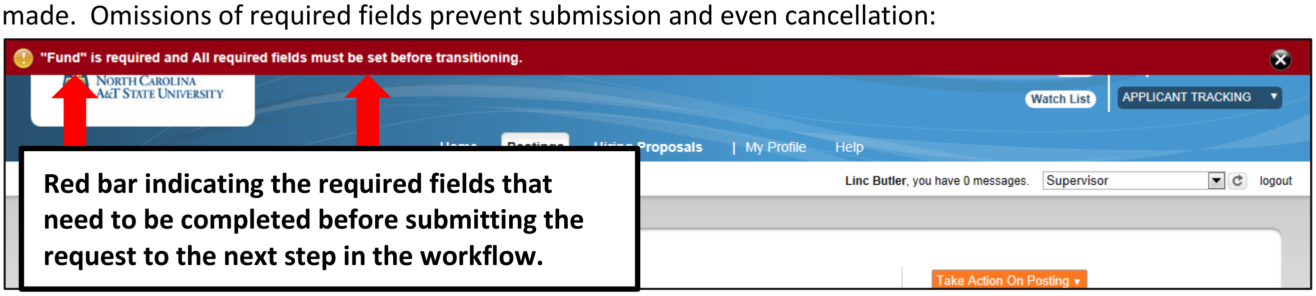
Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example,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



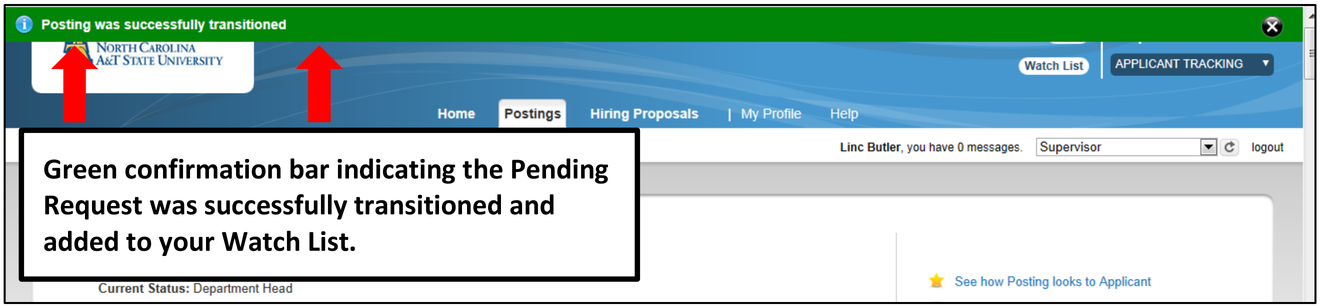
You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send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



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

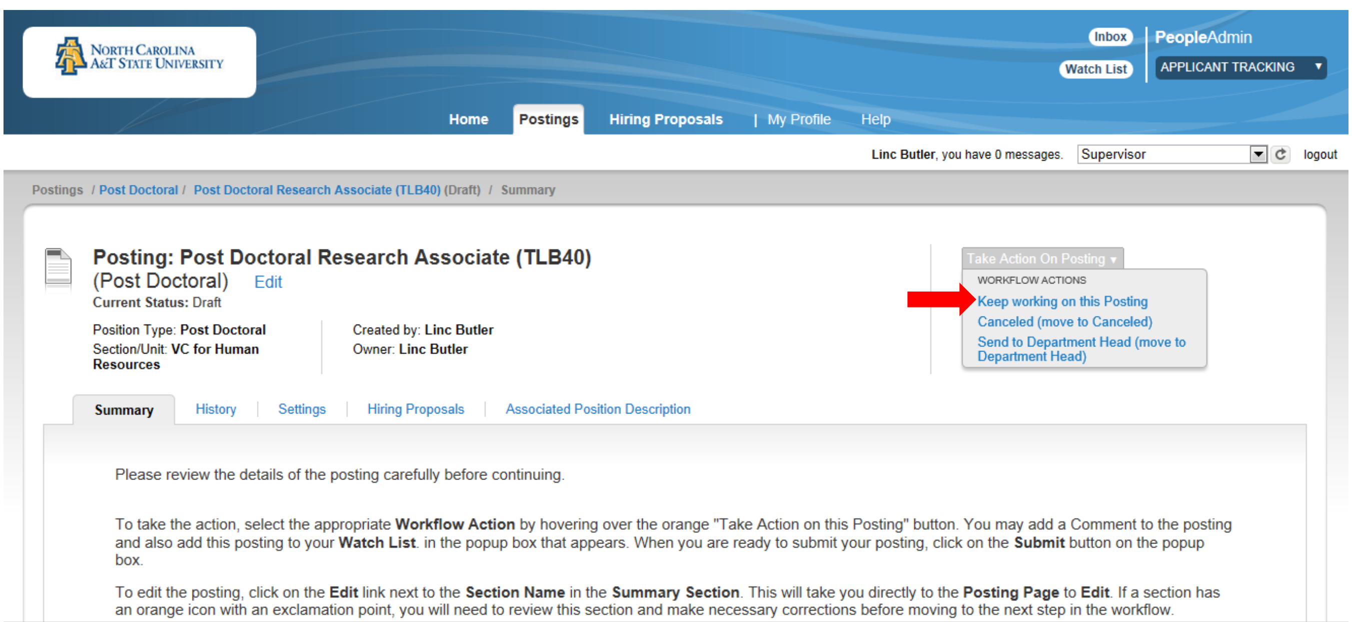


The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if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

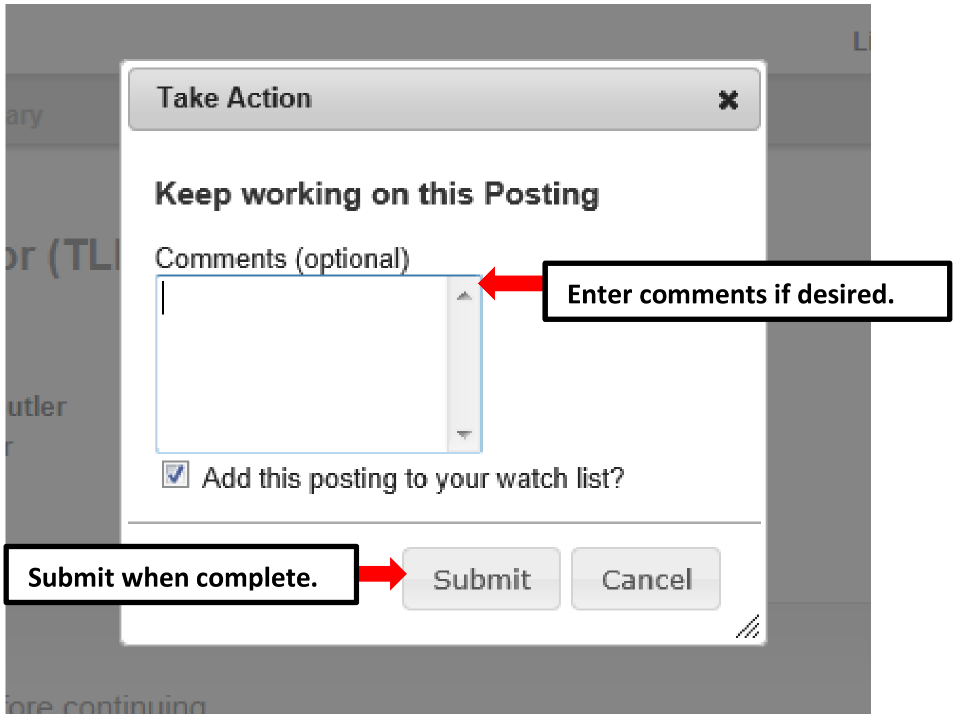
Create New Post Doctoral Posting from an Existing Posting - Saving to Return to a Pending Request Later

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"



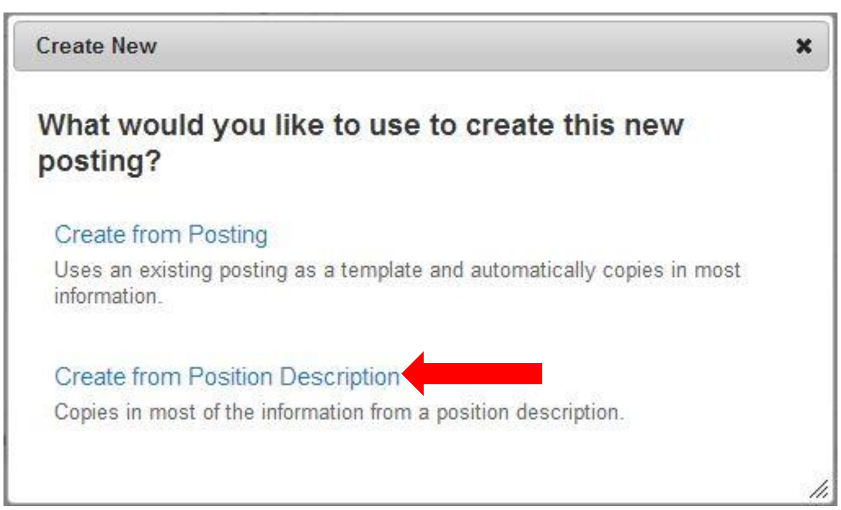
The **Posting** can be located when you log into the Applicant Tracking module again as the same **User Type** you used to begin the action. Hover your cursor over the **Postings tab** and click on "**EHRA**" You will then return to the **EHRA Postings view**, which provides a list of all postings based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

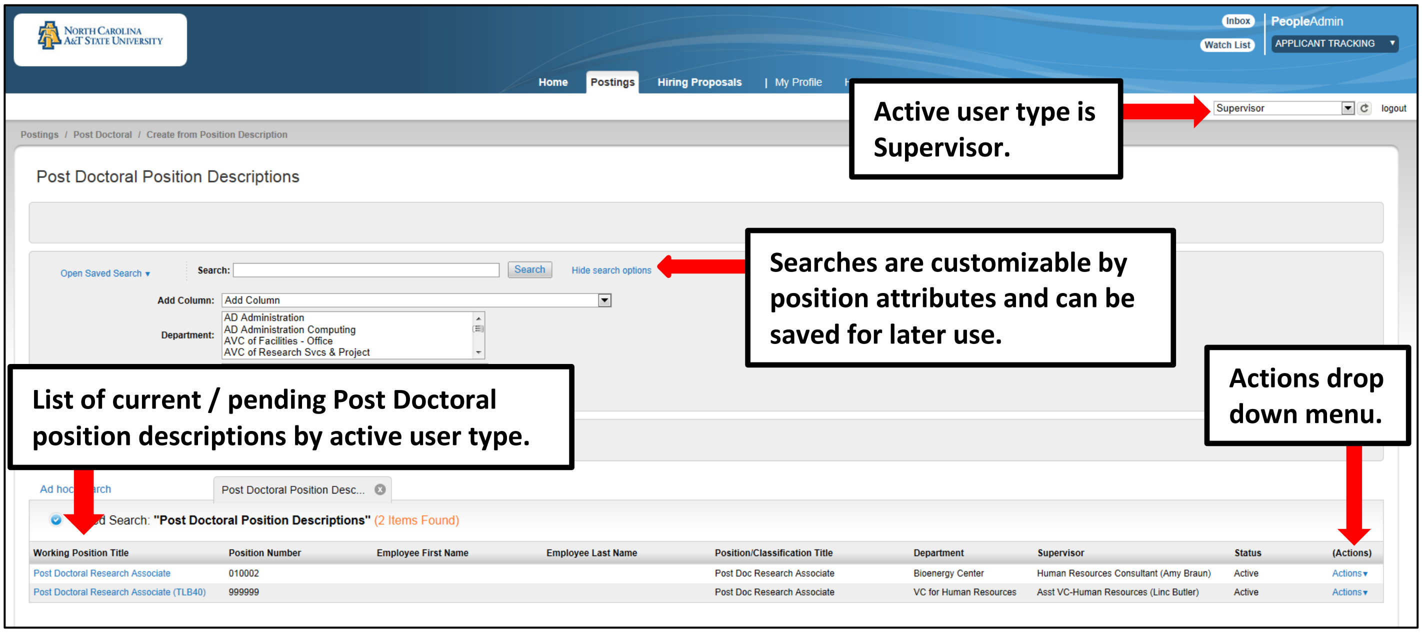
Select **Create from Position Description** if you wish to create a posting using information from a position description that has previously been approved in the PeopleAdmin system.

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.

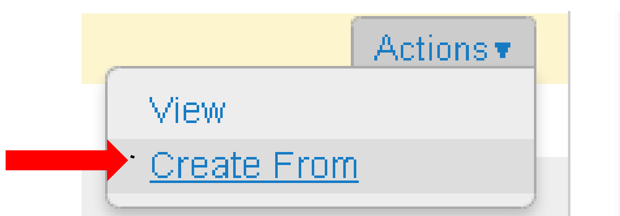
Choosing the **Create from Position Description** option copies information from an existing position description into a new posting:



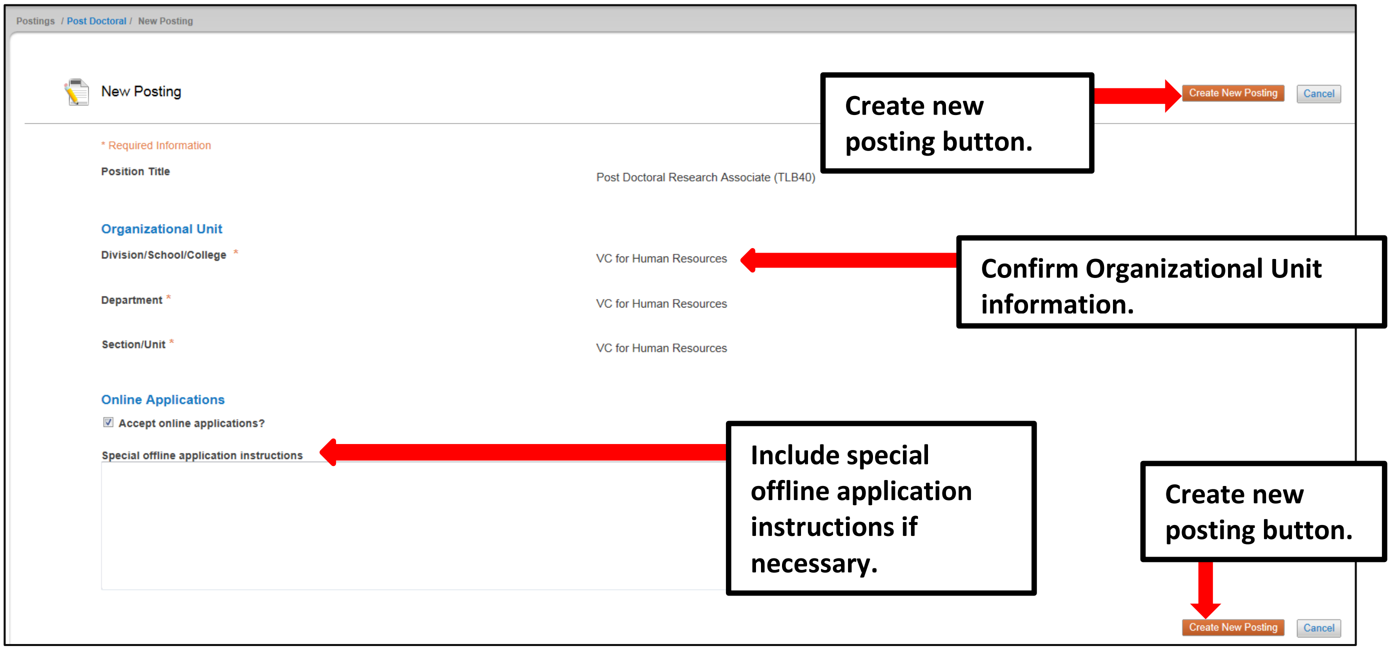
After clicking on **Create from Position Description,** you will be taken to the **Post Doctoral Position Descriptions** view, where you can search position descriptions by any number of criteria, including but not limited to position title, posting number, position number, department name, or supervisor 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:



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:**



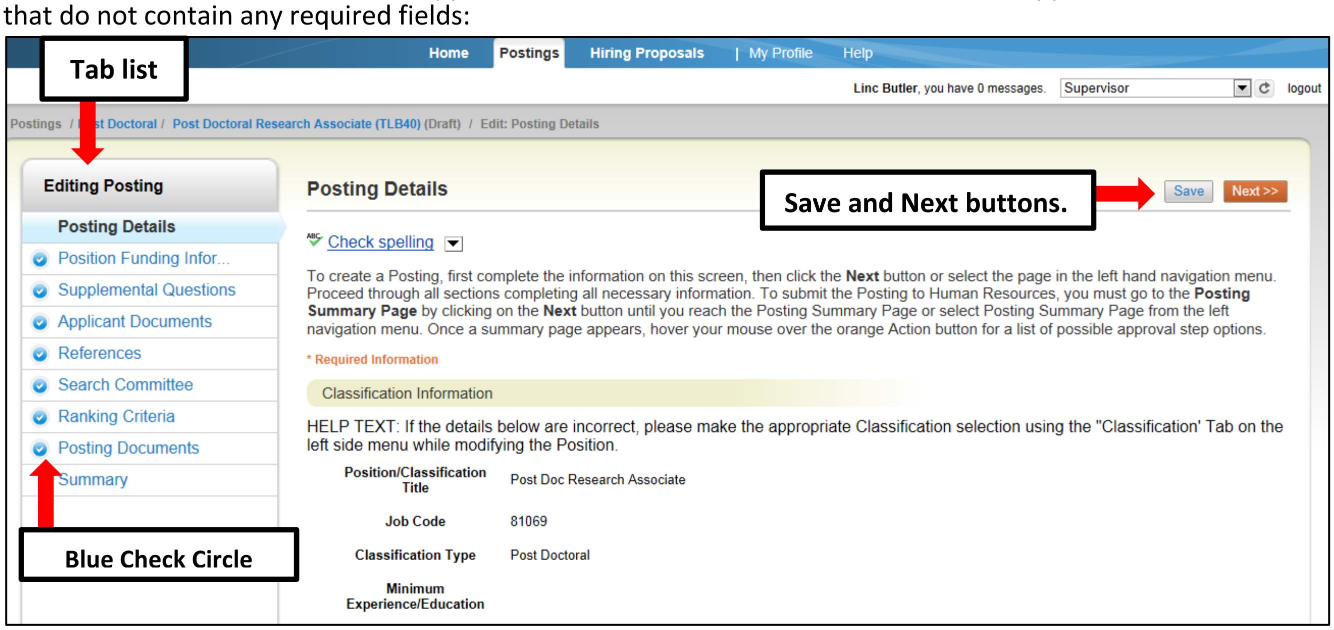
By clicking **Create From**, the **New Posting** form will appear. This is where you can update the working title of the position for the purpose of posting, and view **Organizational Unit** information to confirm accuracy. You can also provide **Special Offline Application Instructions** in the field 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:



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.

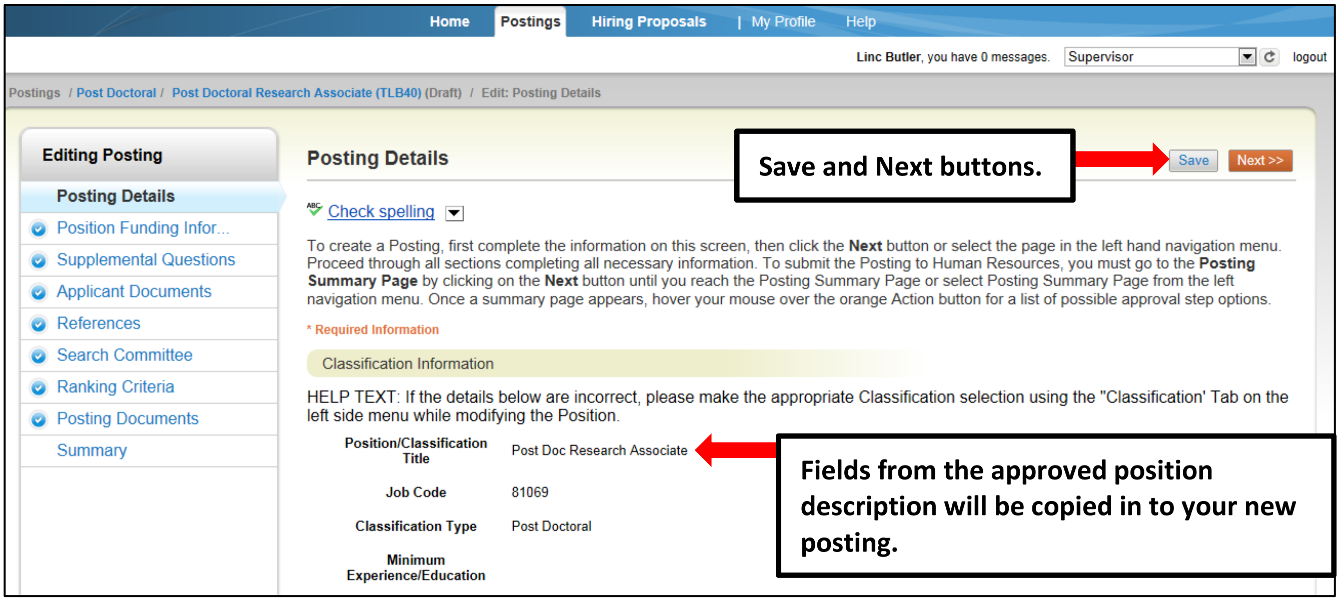
You can save the changes you've made to the active tab you're working on and navigate to the next tab in the list simultaneously by clicking the Next >> button located in both the top and bottom right corners of the page. You can save the active tab you're working on and stay on the same tab by clicking 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.

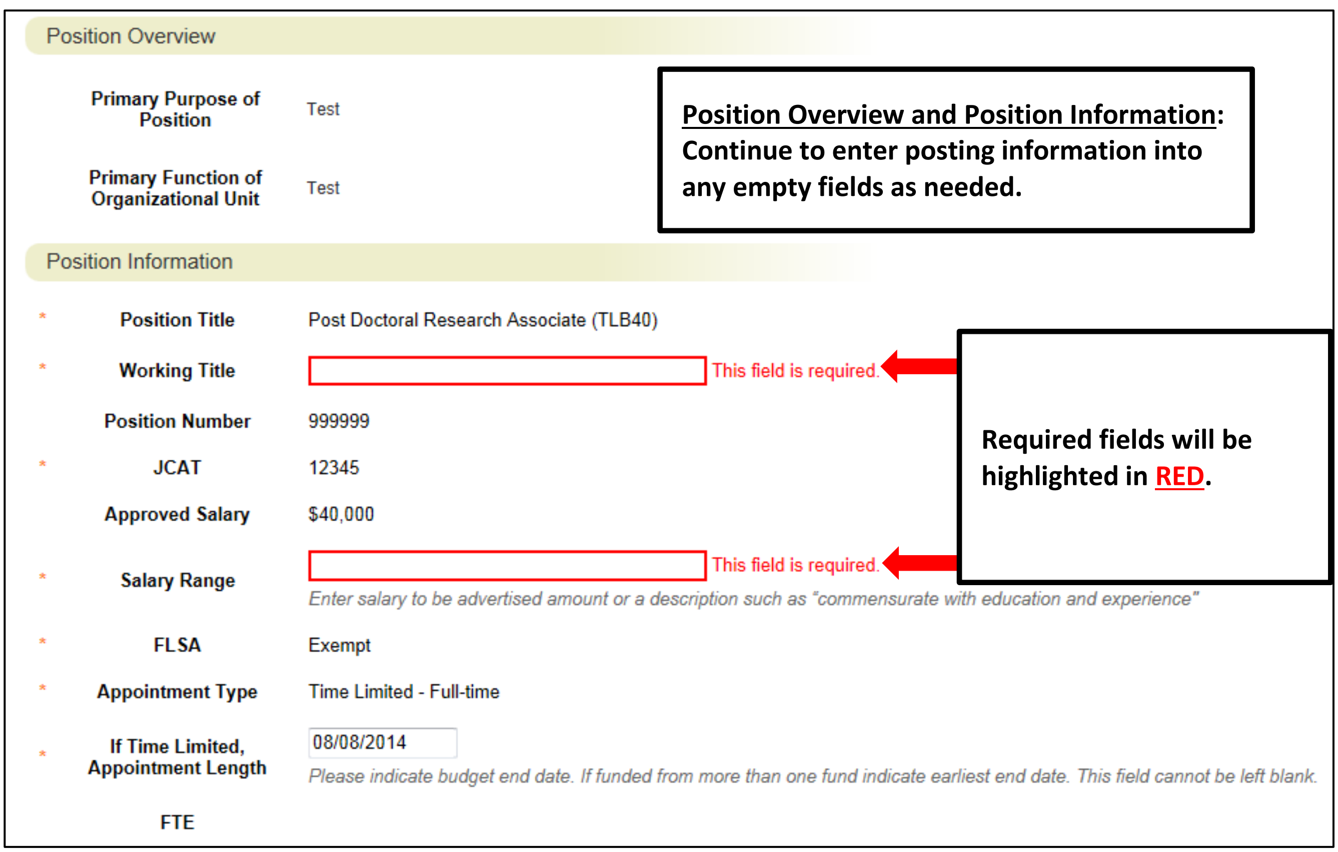
Required fields are highlighted in **red** and must be filled in before the new **Post Doctoral Posting** can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check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



Create New Post Doctoral Posting from a Position Description – Posting Details Tab

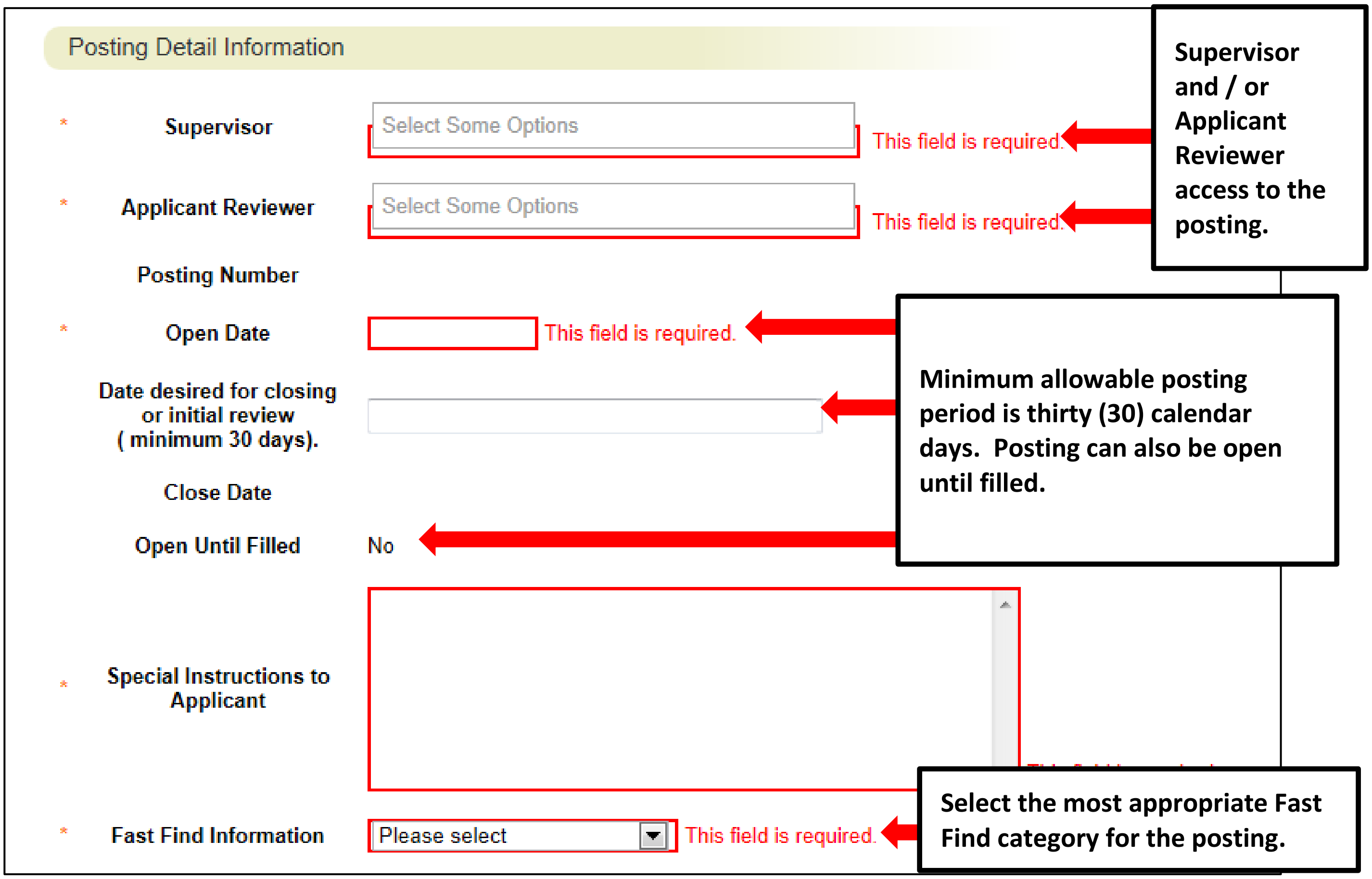
Since you are creating a new **Post doctoral Posting** from an approved position description, many of the fields will already be filled in with information copied from the position description. Follow the instructions at the top of the page to complete any remaining required fields, then cli Next >>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



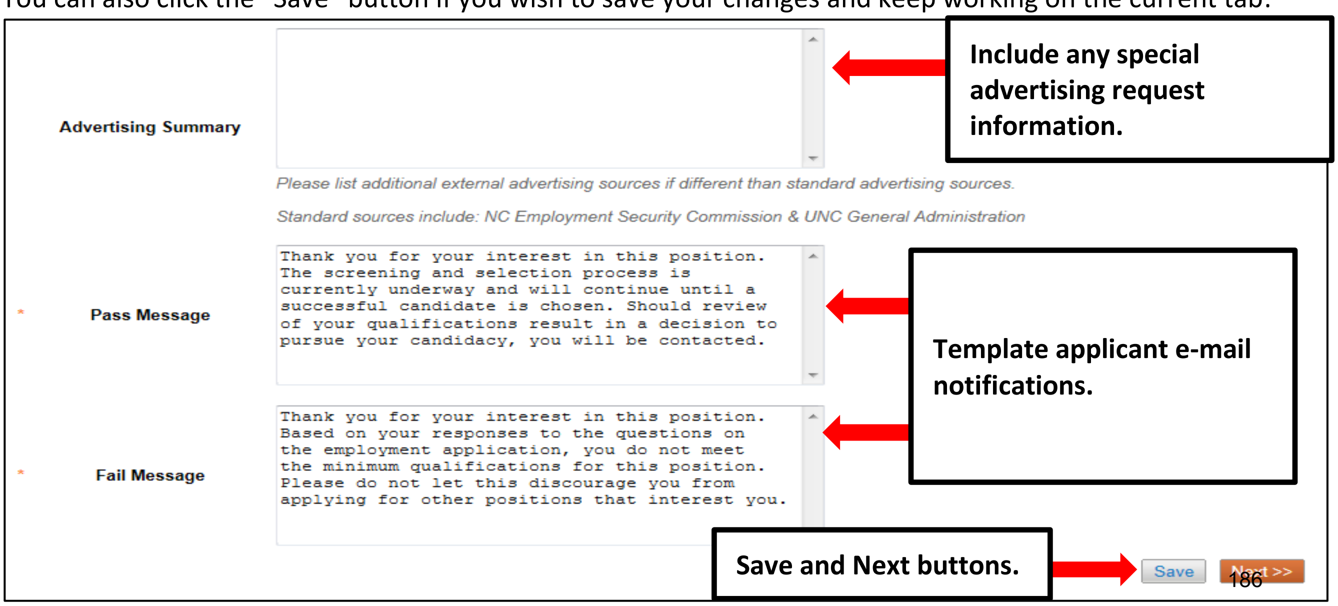


You can indicate other users you would like to have **Supervisor** and / or **Applicant Reviewer** access to the posting by searching for their name in the Supervisor and Applicant Reviewer fields. Indicate the proposed **Open Date** and **Date Desired for Closing or Initial Review (minimum 30 days)**, 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:

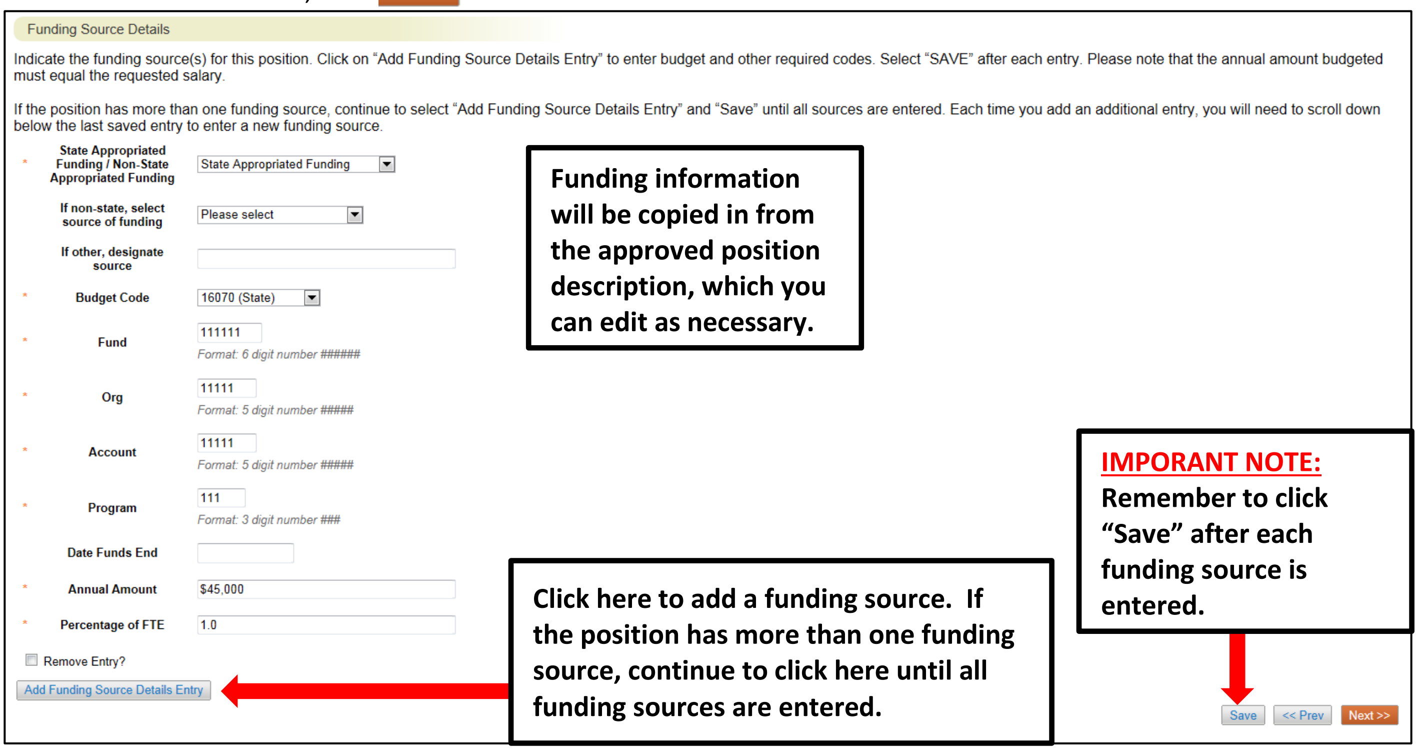


Create New Post Doctoral Posting from a Position Description – Position Funding Information Tab

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:



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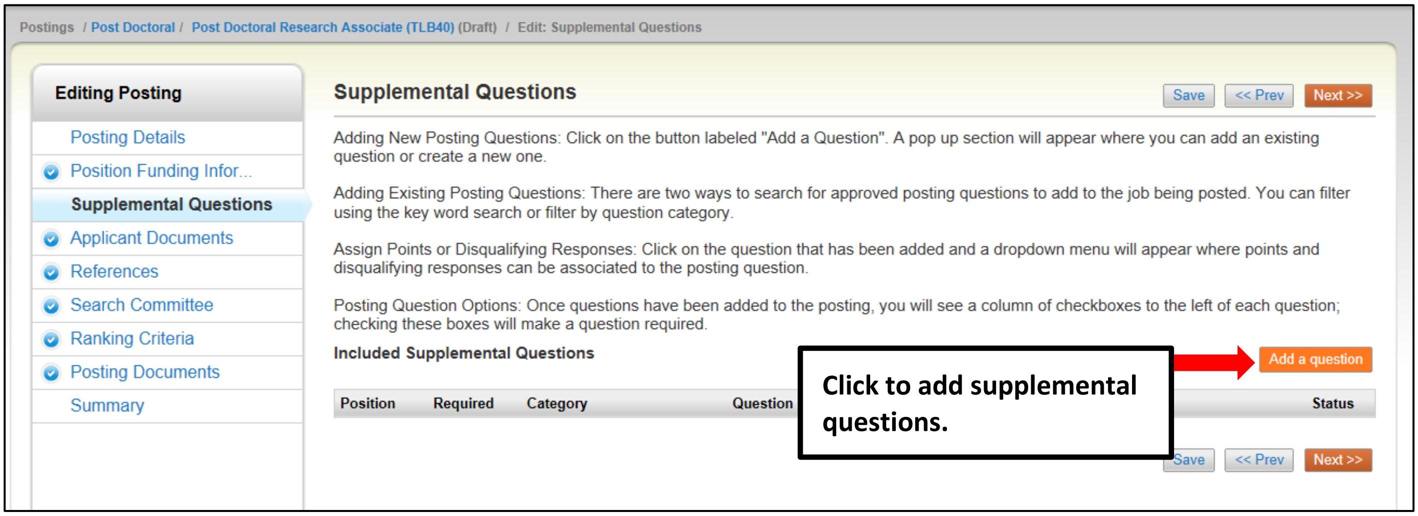

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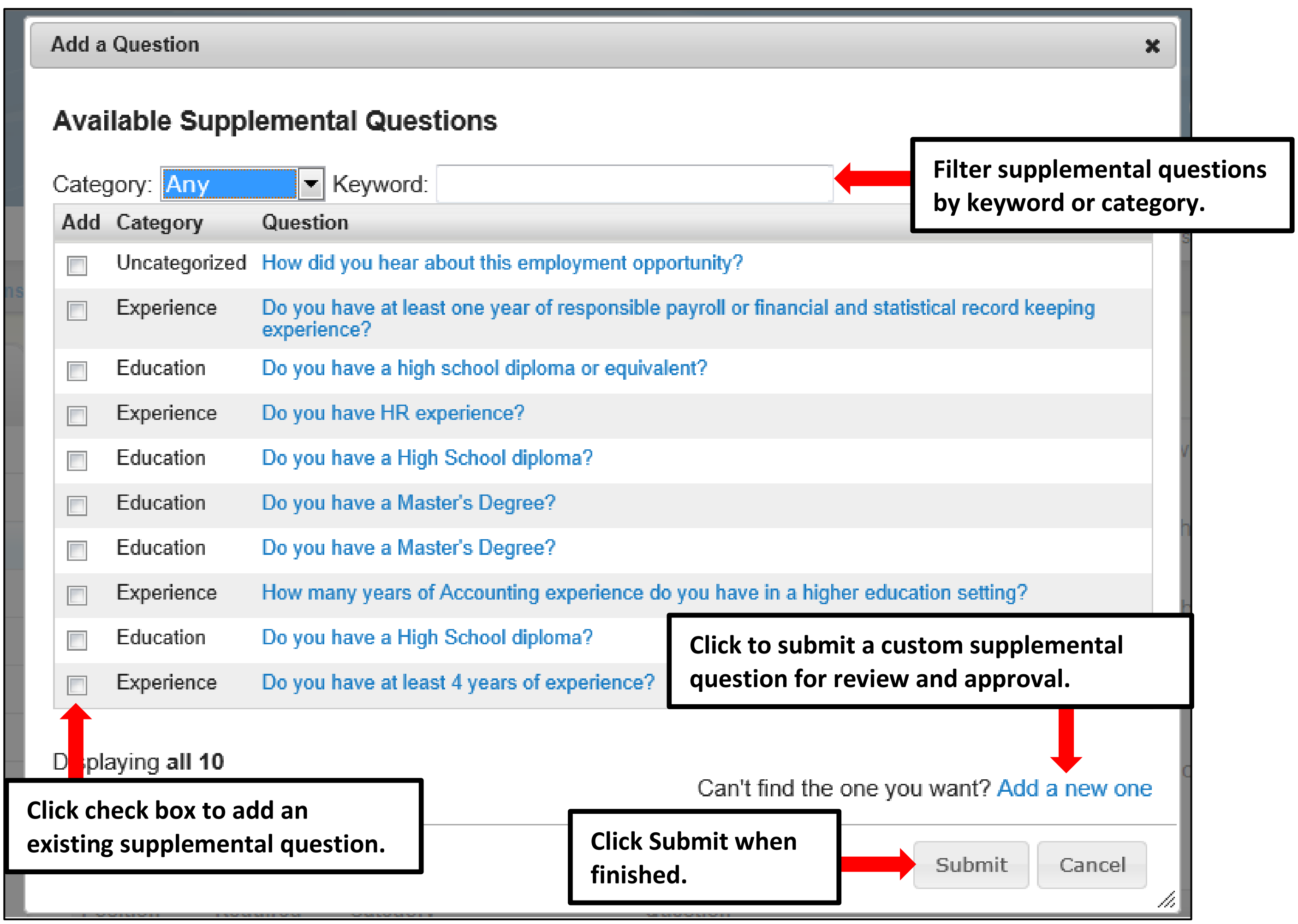

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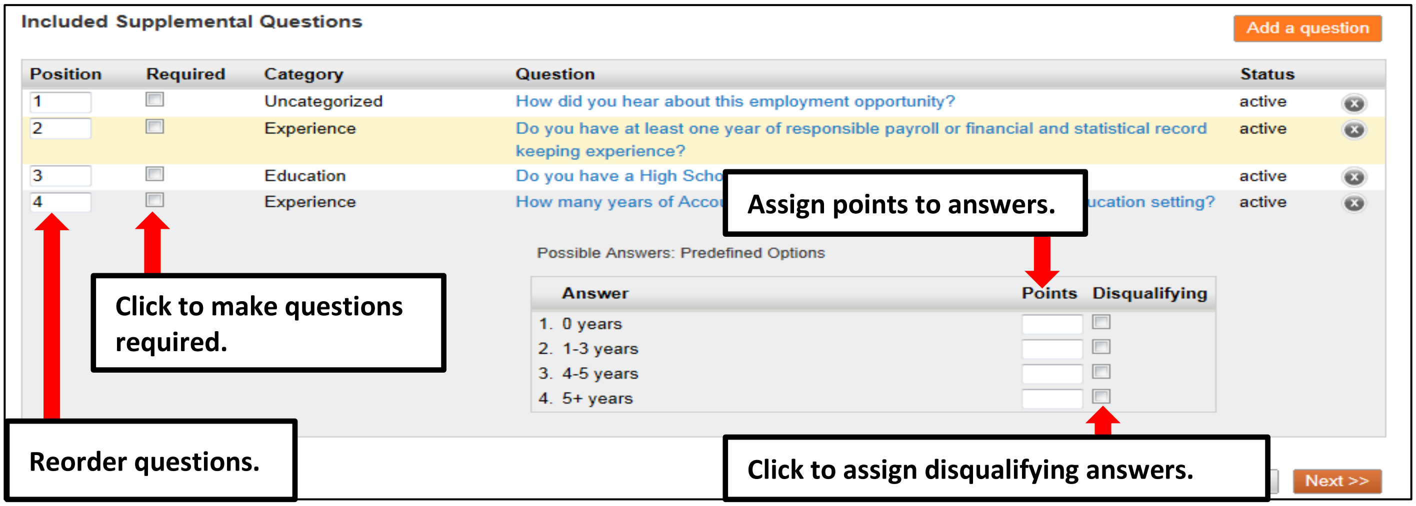

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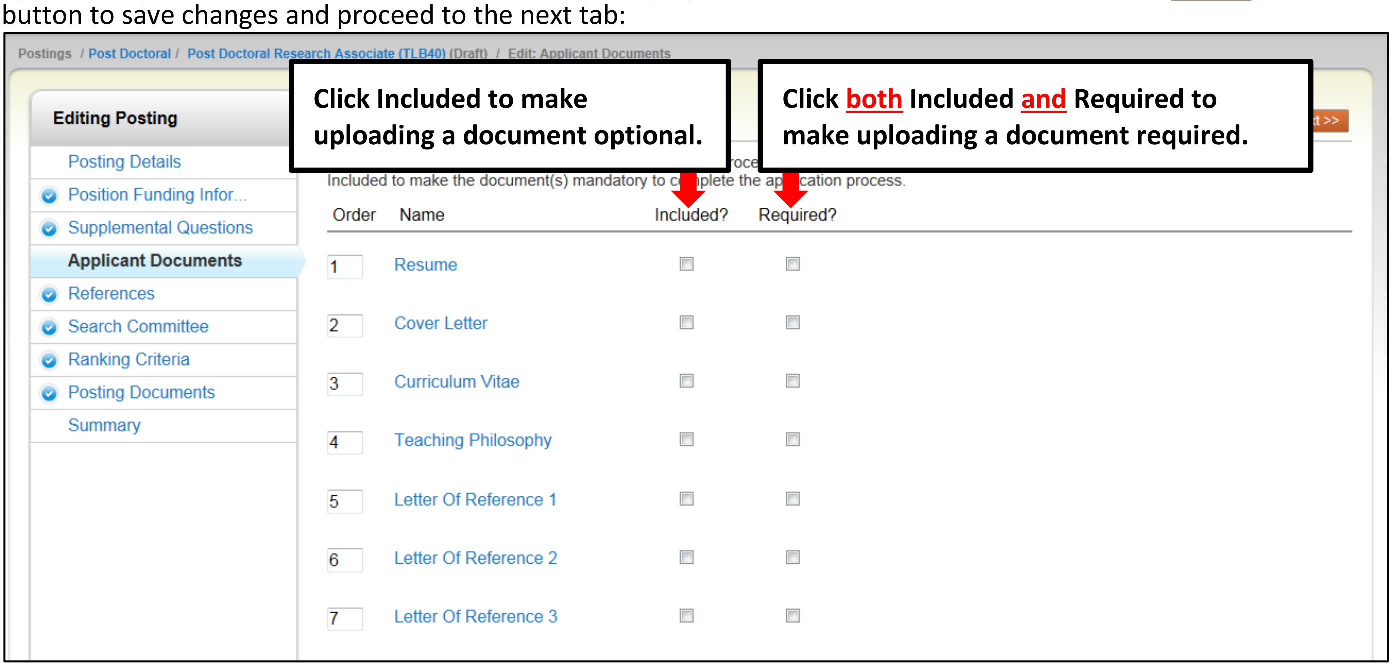

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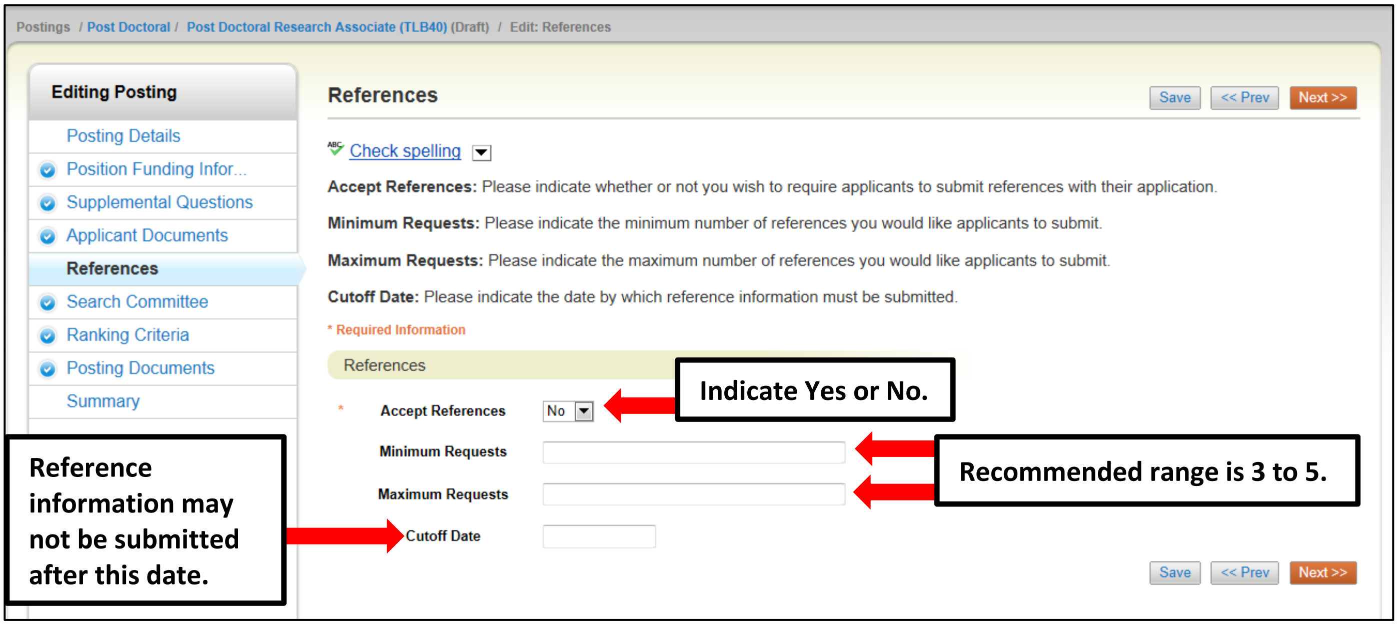

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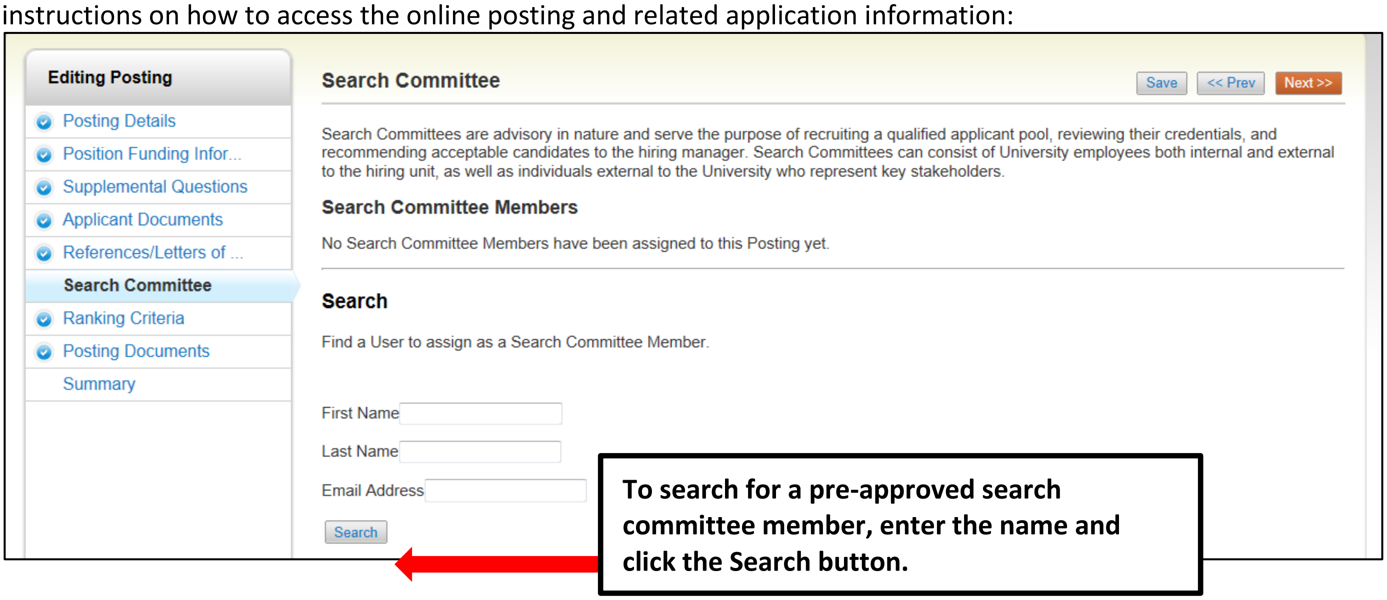
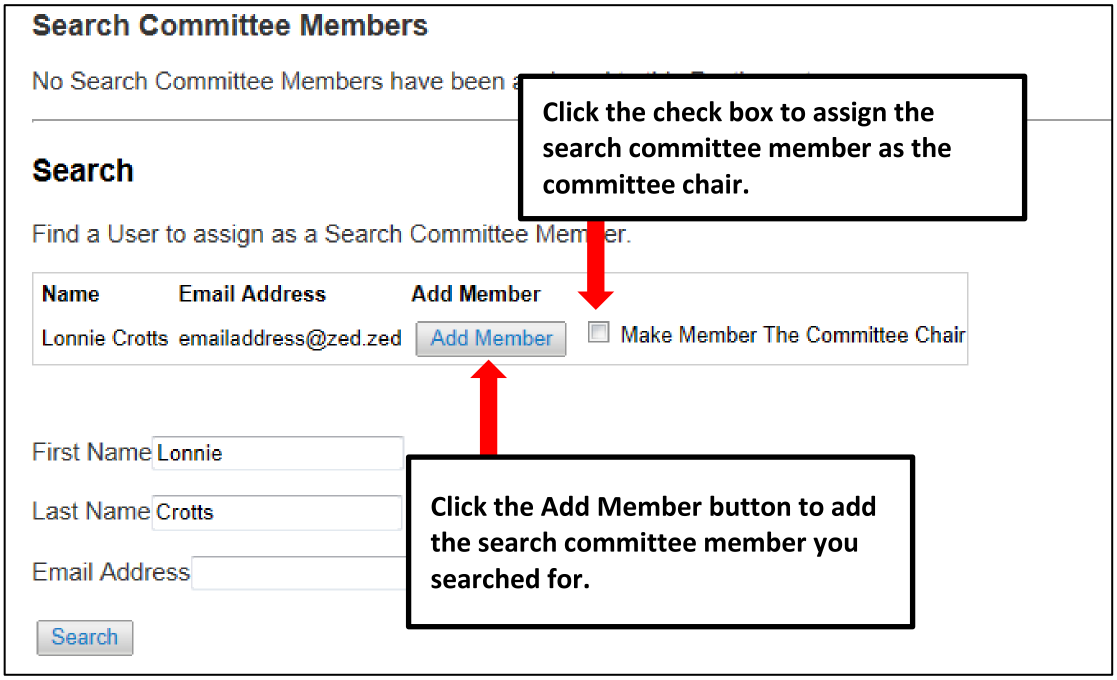
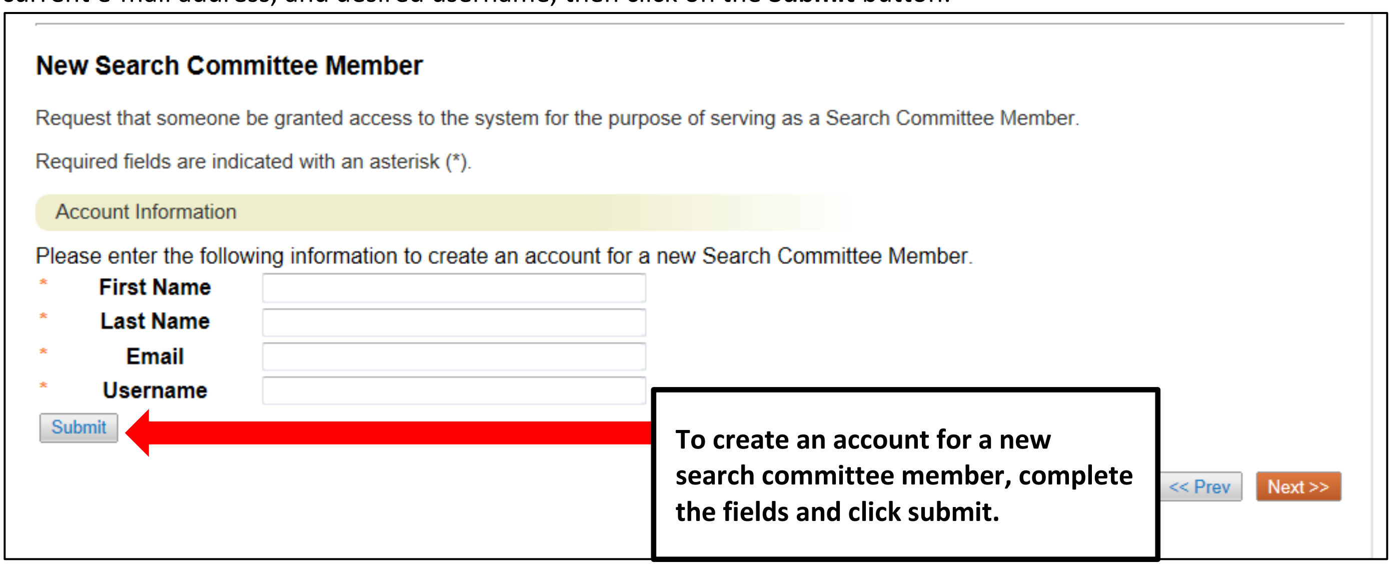


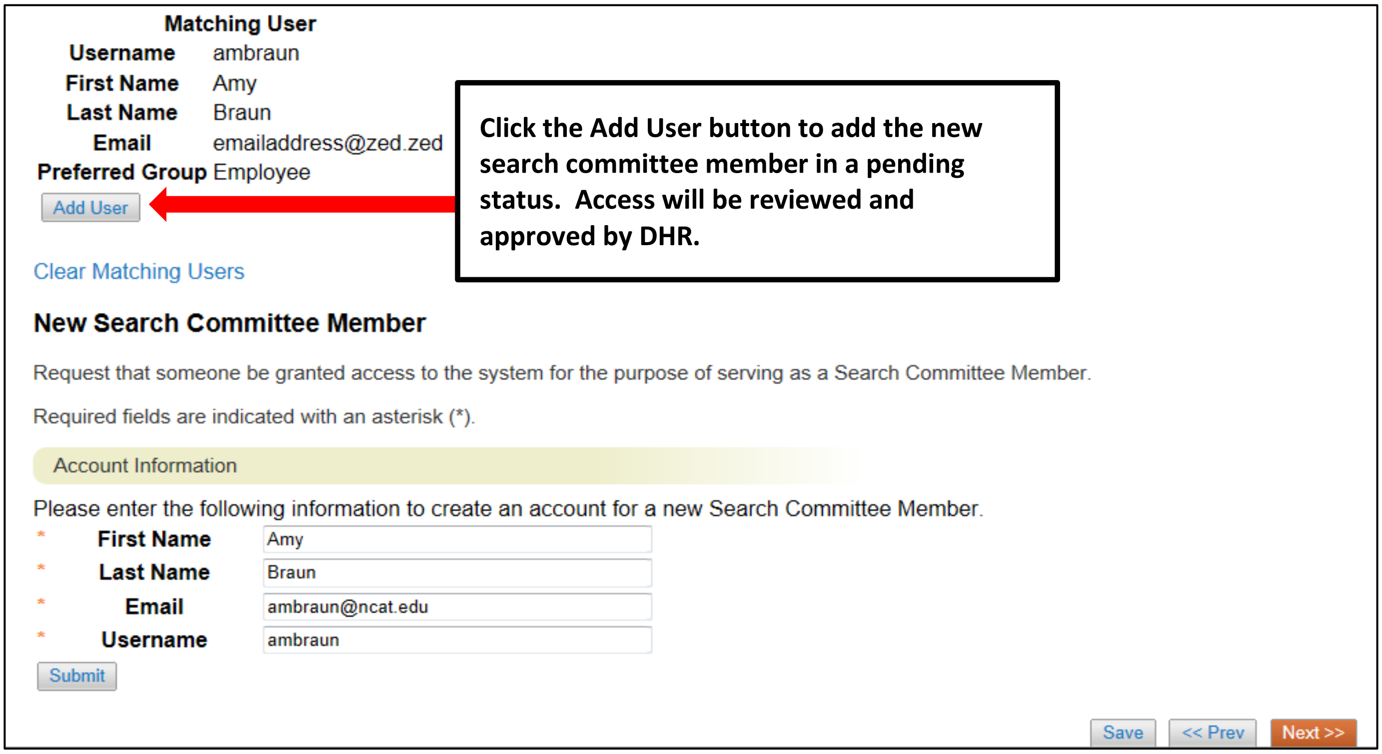
After searching for a pre-approved search committee member, click on the **Add Member** button to add them to your search committee. You can also make a search committee member the chair of the search committee by clicking on the check box next to **"Make Member the Committee Chair"**:



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:

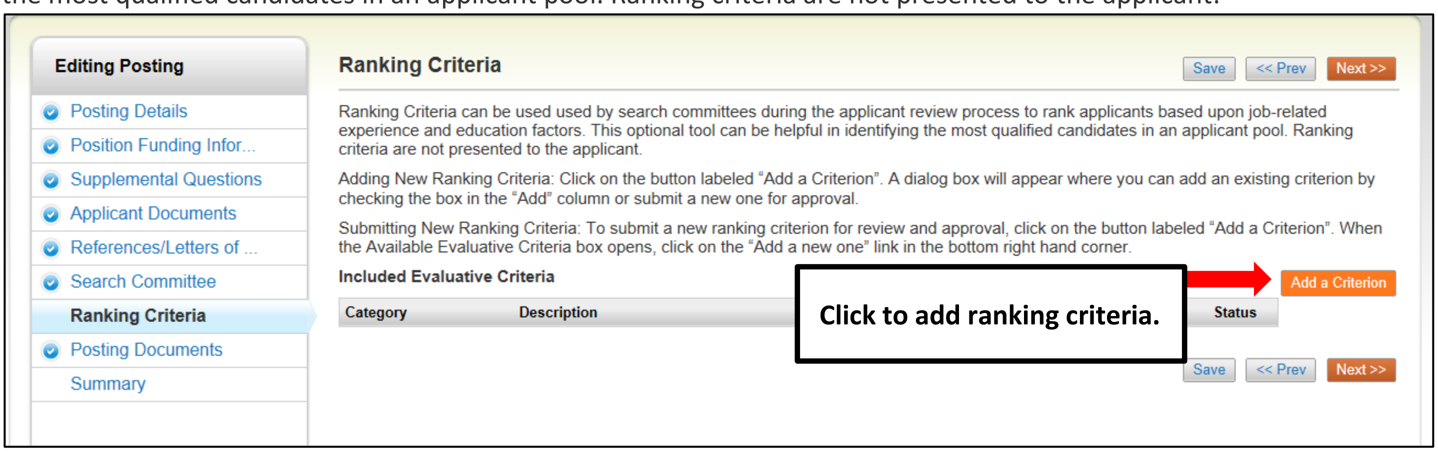


If the requested search committee member is already an assigned user of the PeopleAdmin system, their user account information will be displayed, and you can add them to your search committee by clicking on the **Add User** button:

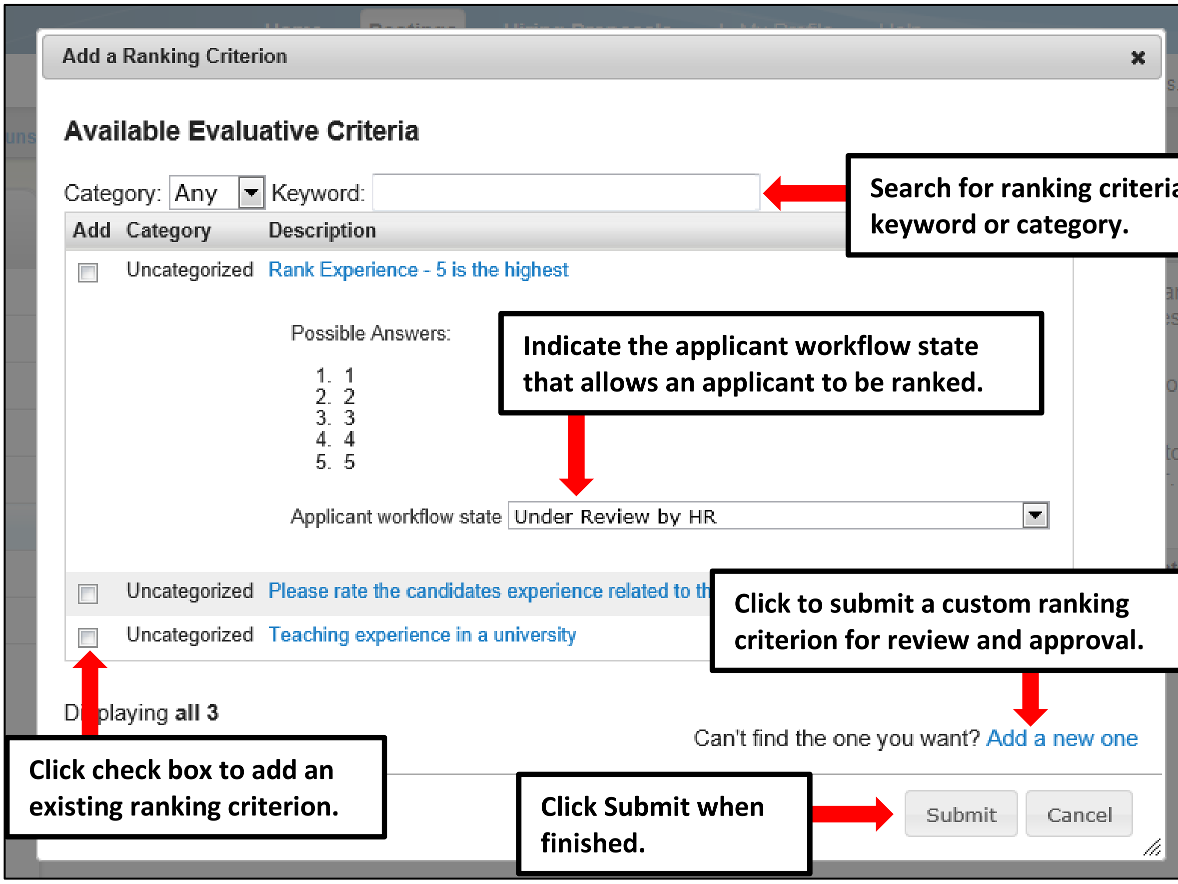


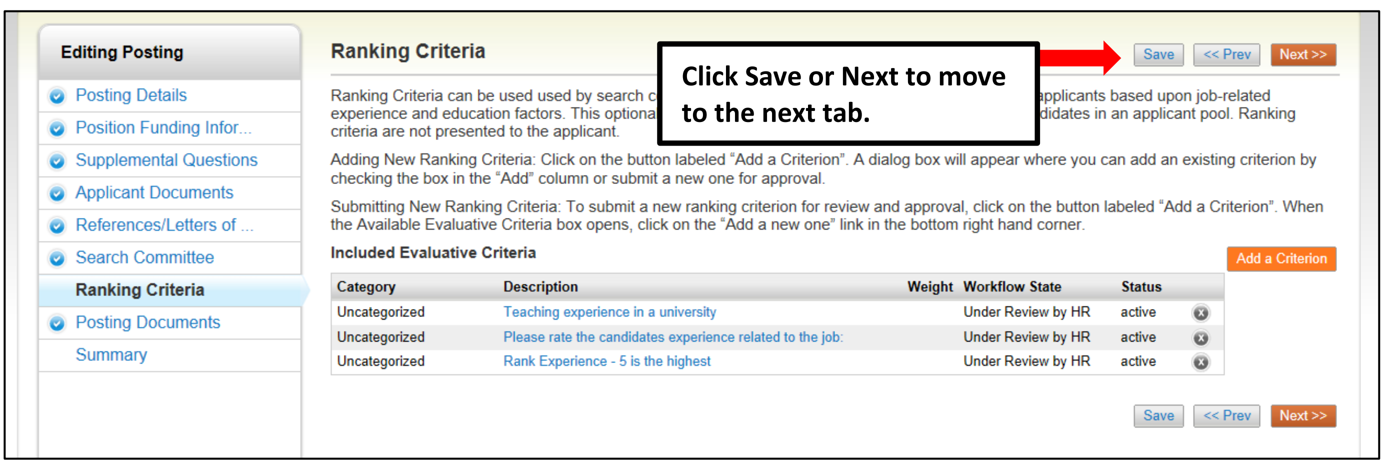
Create New Post Doctoral Posting from a Position Description – Ranking Criteria Tab

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:



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:



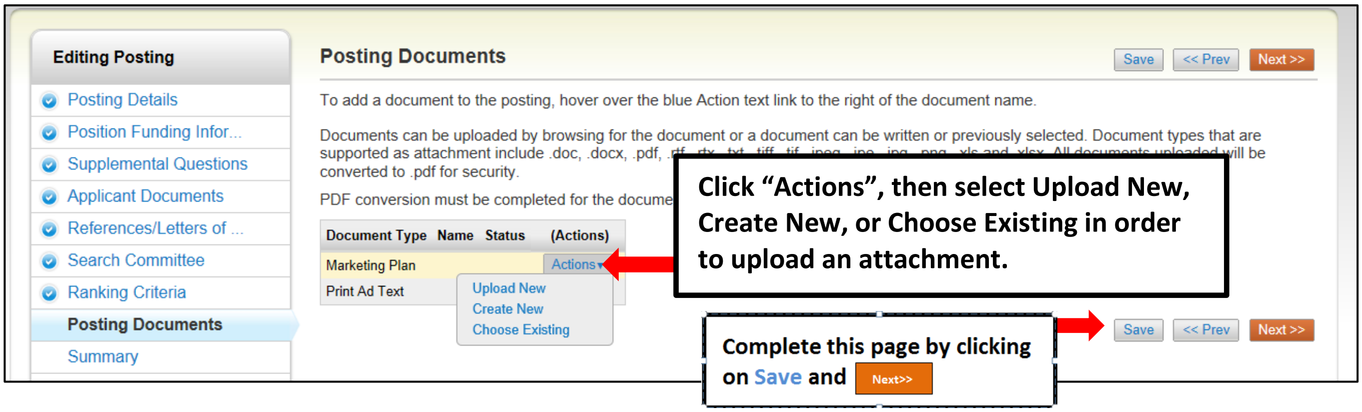


Create New Post Doctoral Posting from a Position Description – Posting Documents Tab

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.

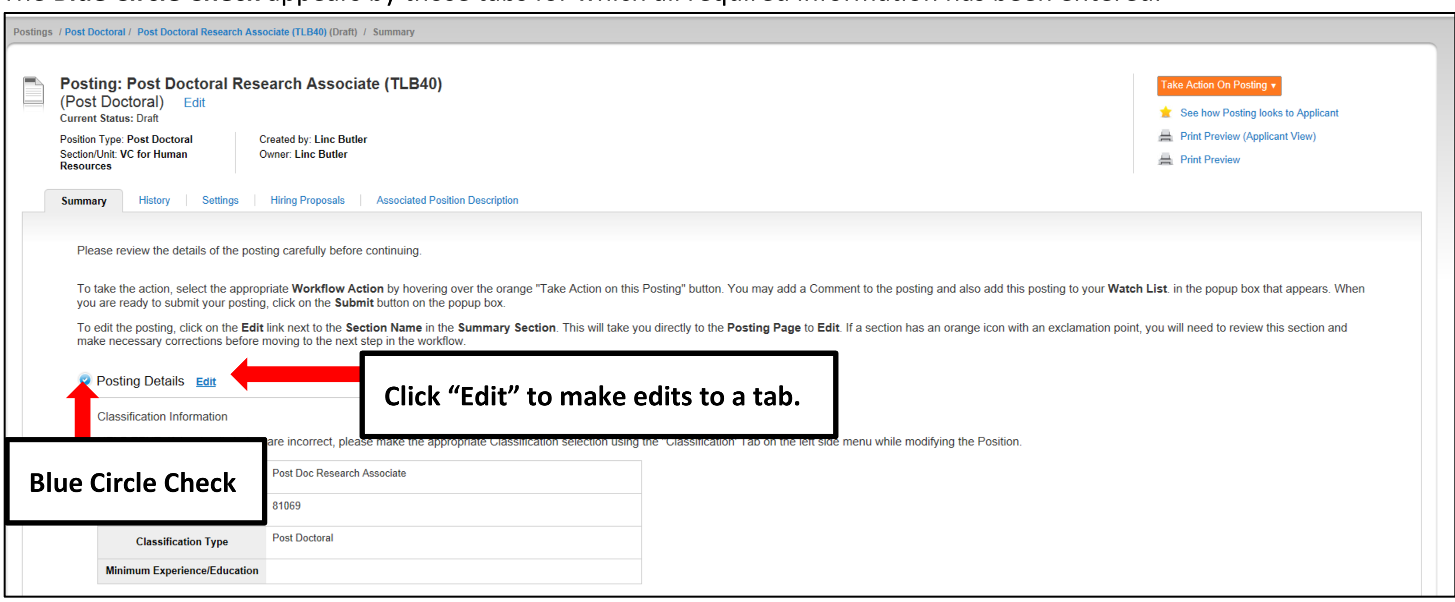
Excel and Word documents may be attached.   PDF conversion must be completed for the document to be valid when applicable:



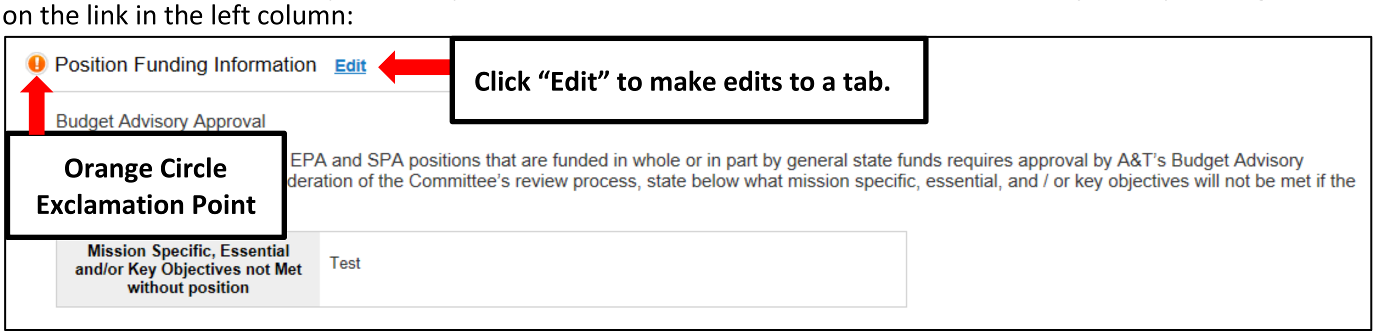
Create New Post Doctoral Posting from a Position Description – Summary Tab

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:

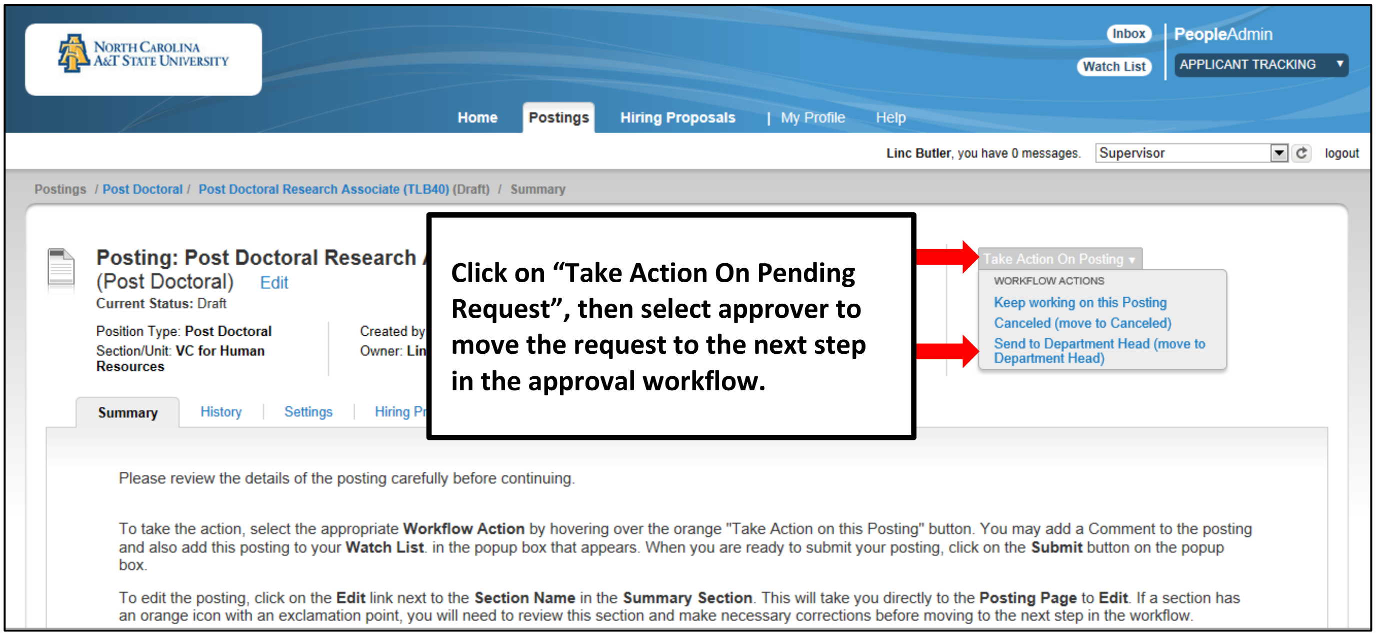


An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save",** and then return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

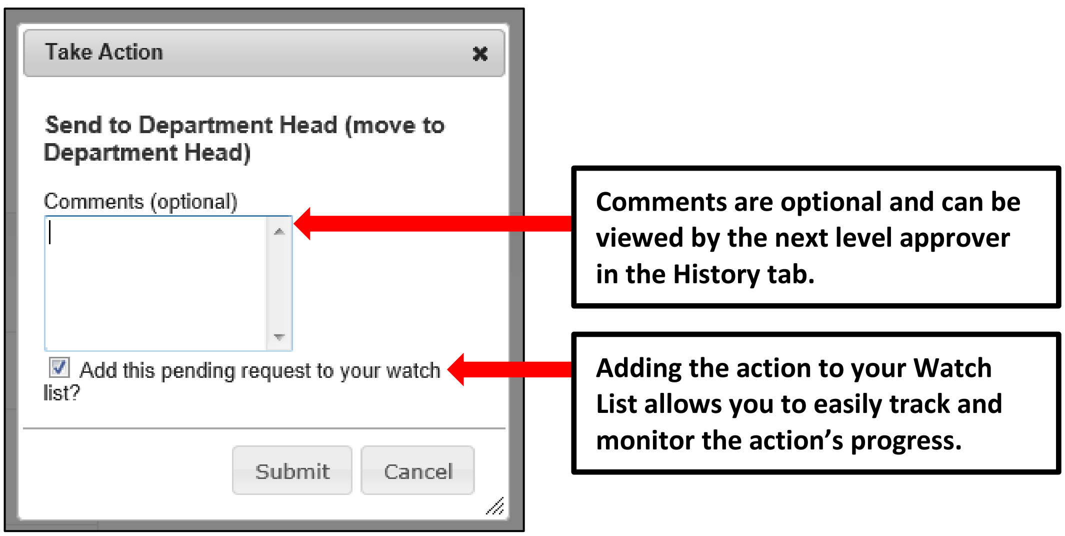


Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on**

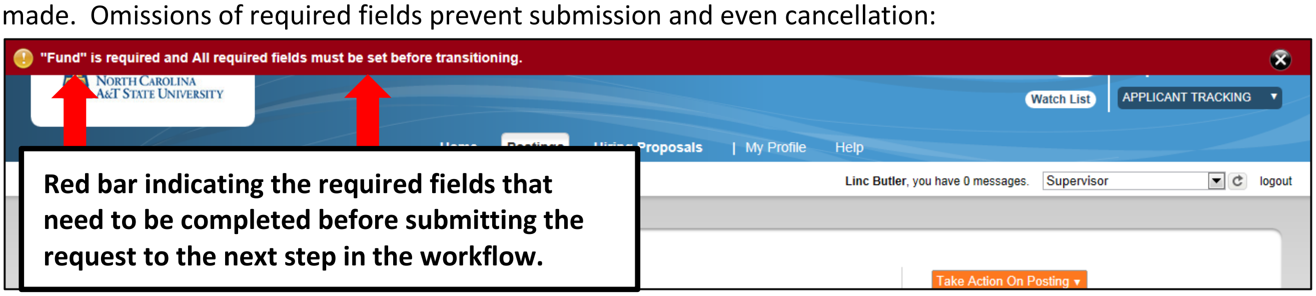
Pending Request" button and selecting the appropriate routing action. In this example, the appropriate routing action is **"Send to Department Head (Move to Department Head)"**:



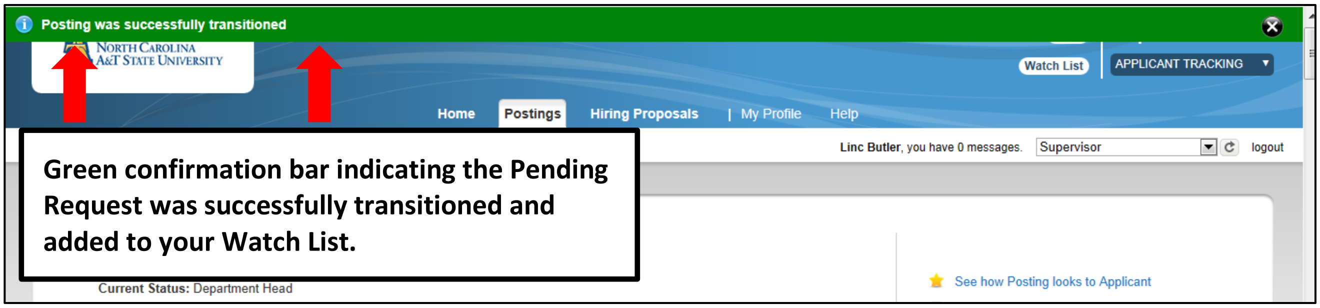
You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send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



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

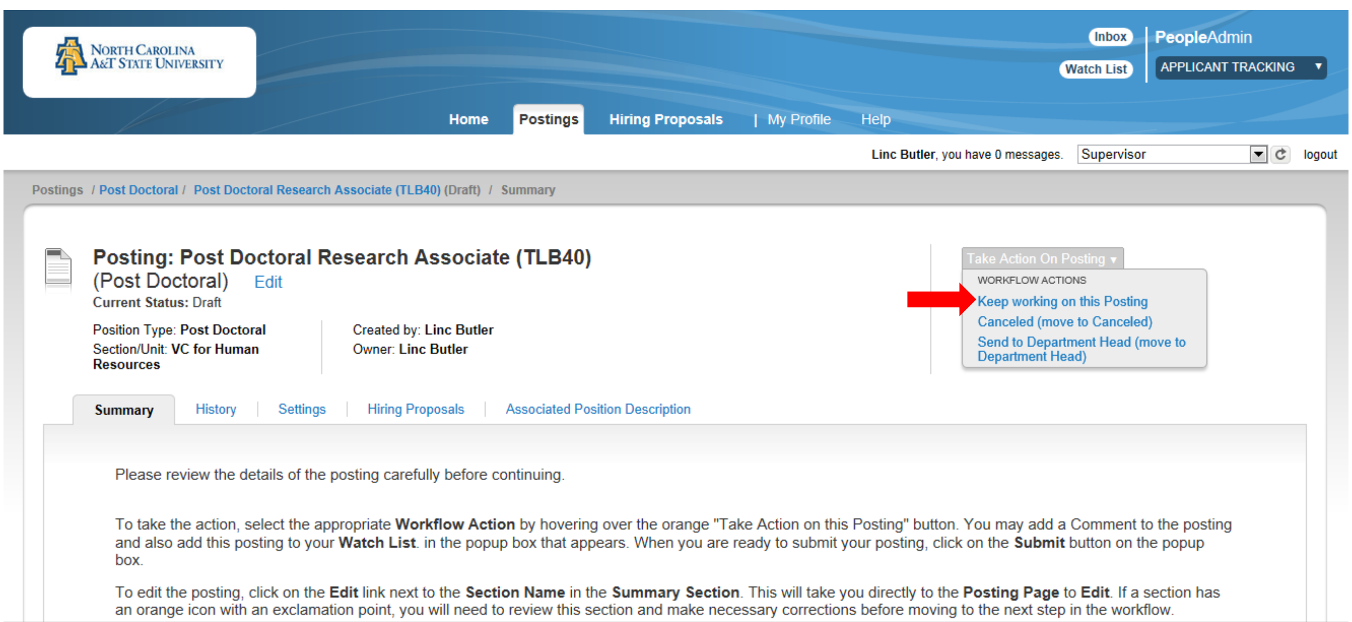


The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if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

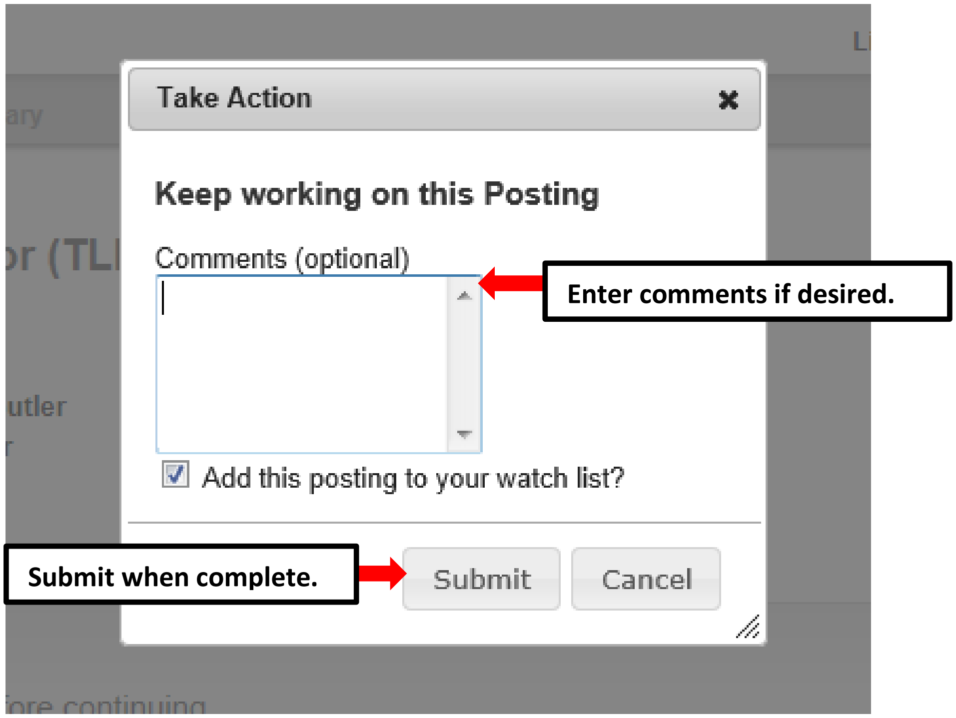
Create New Post Doctoral Posting from a Position Description - Saving to Return to a Pending Request Later

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"

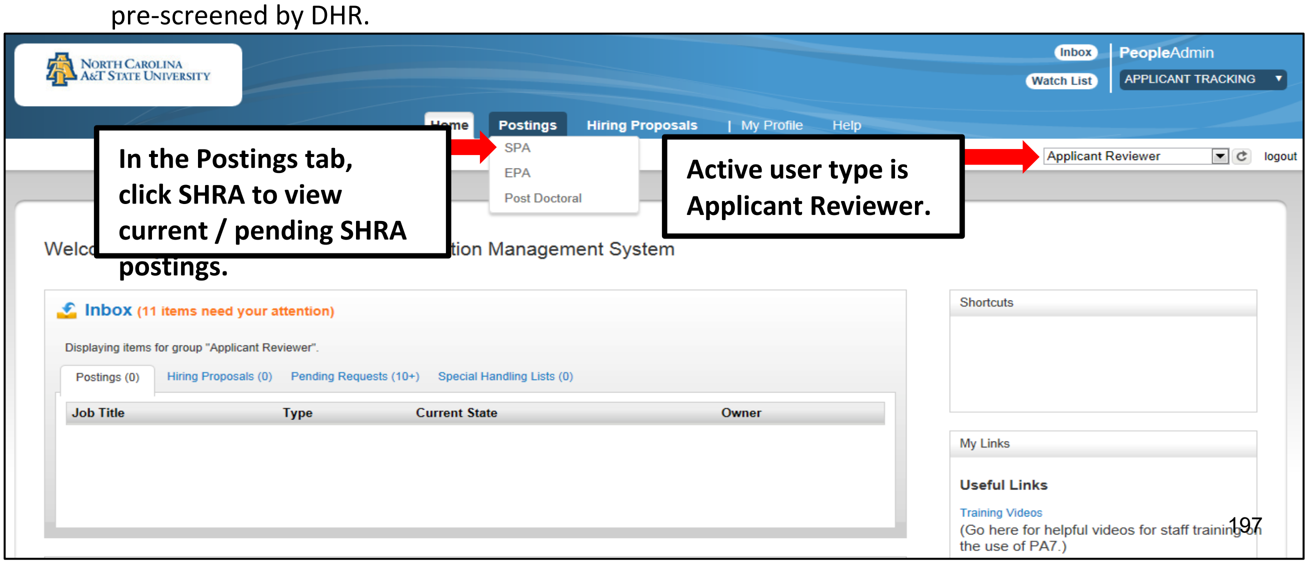


The **Posting** can be located when you log into the Applicant Tracking module again as the same **User Type** you used to begin the action. Hover your cursor over the **Postings tab** and click on "**EHRA**" You will then return to the **EHRA Postings view**, which provides a list of all postings based 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 Recruitment Coordinator. 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 manager.
- Applications for EHRA and Post Doctoral postings route directly to the hiring manager and are not pre-screened by DHR.

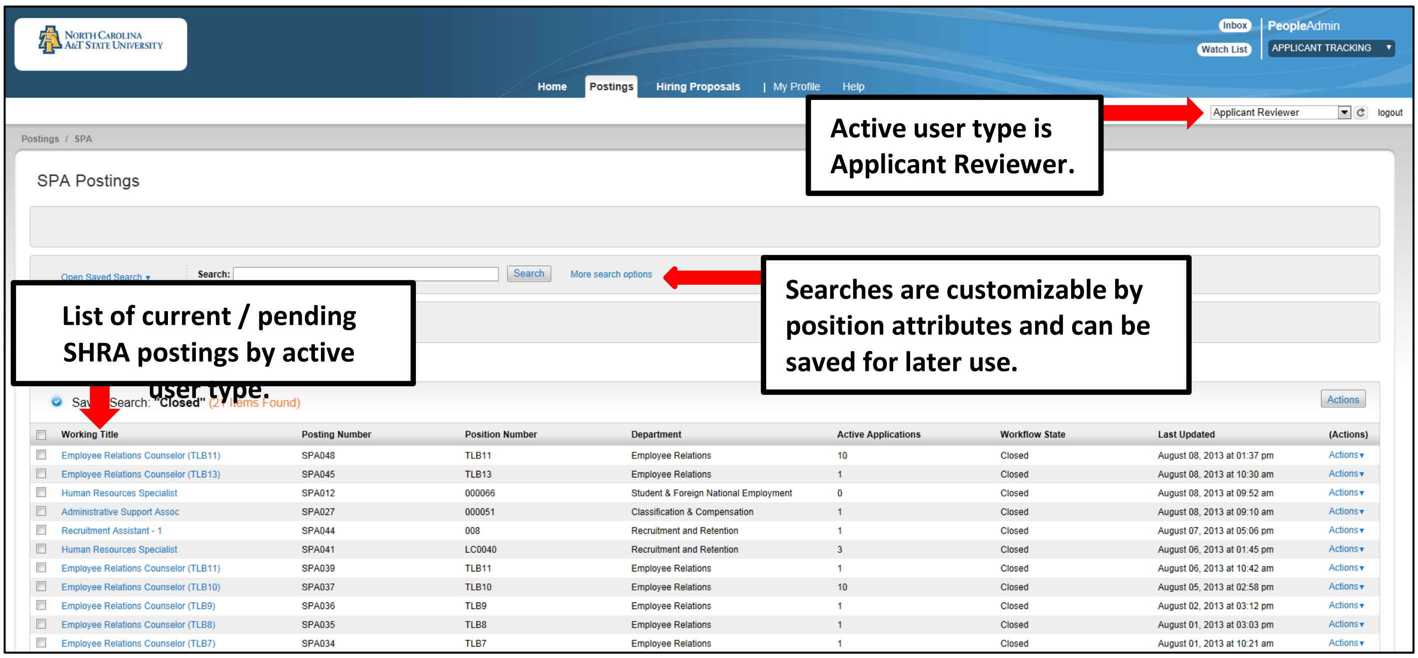


You will then be taken to the **SHRA Postings** view, which provides a list of all current/pending SHRA postings initiated based on your active user type as follows:

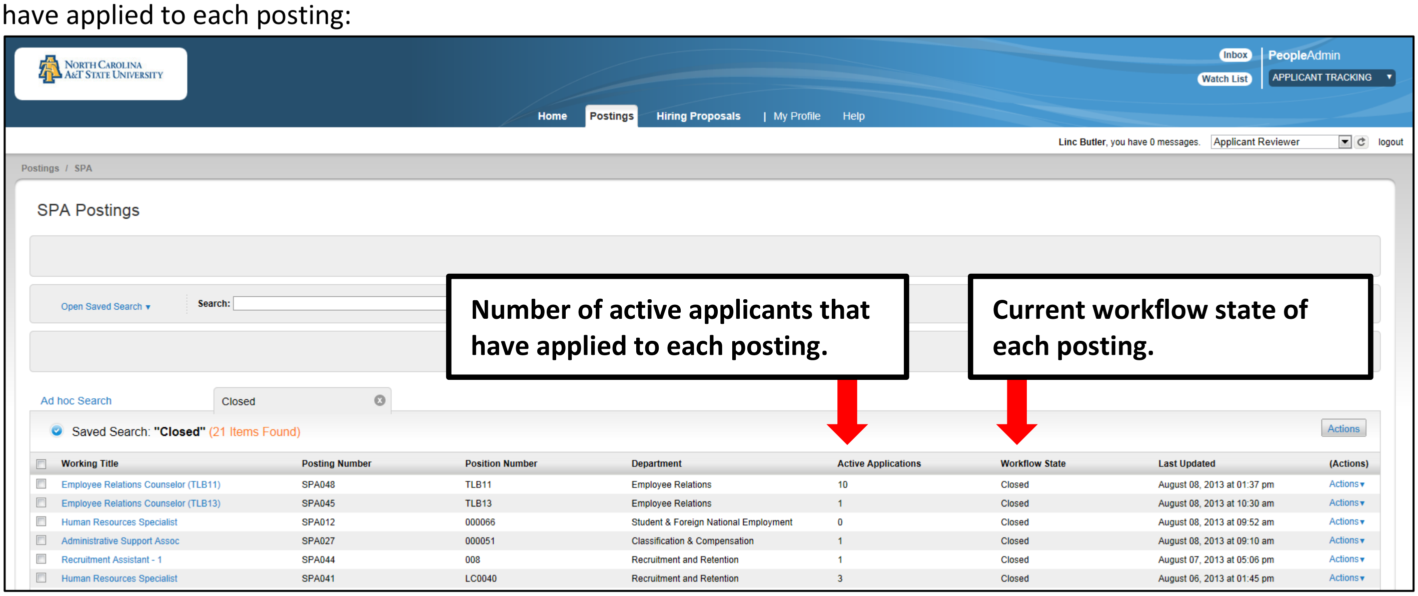
Active User Type	Positions in Position Descriptions List
Supervisor	Current / pending postings for positions that are direct reports to the Supervisor only.
Department Head	Current / pending postings for all positions that report to the department the Department Head is assigned to.
Dean / Vice Chancellor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

Applicant Review – Postings View

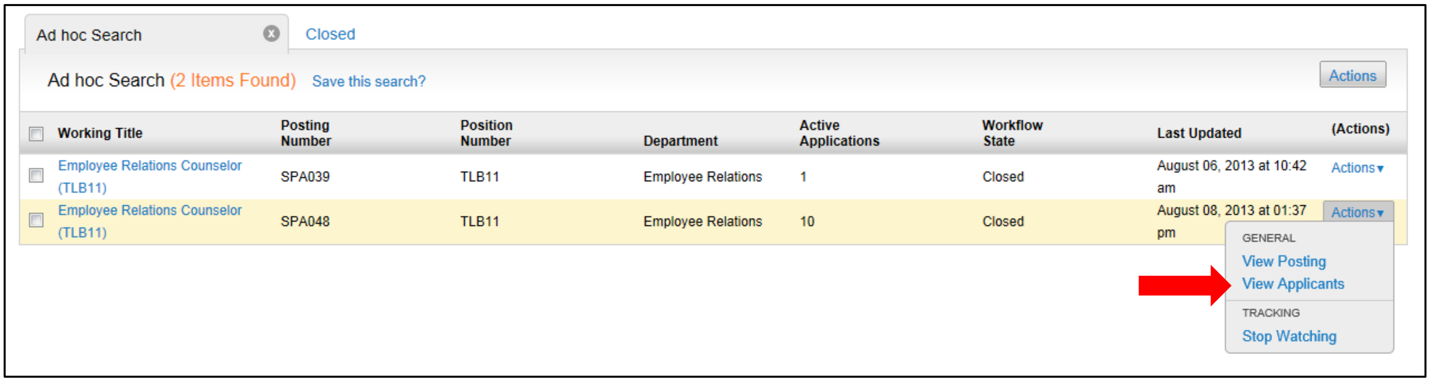
In the **SHRA Postings** view, you can search postings by any number of criteria, including but not limited to position title, posting number, position number, department name, supervisor name, or workflow state. Searches are fully customizable by position and posting attributes, and you can save custom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



You can also view the workflow state of current / pending postings and see how many active applicants have applied to each posting:

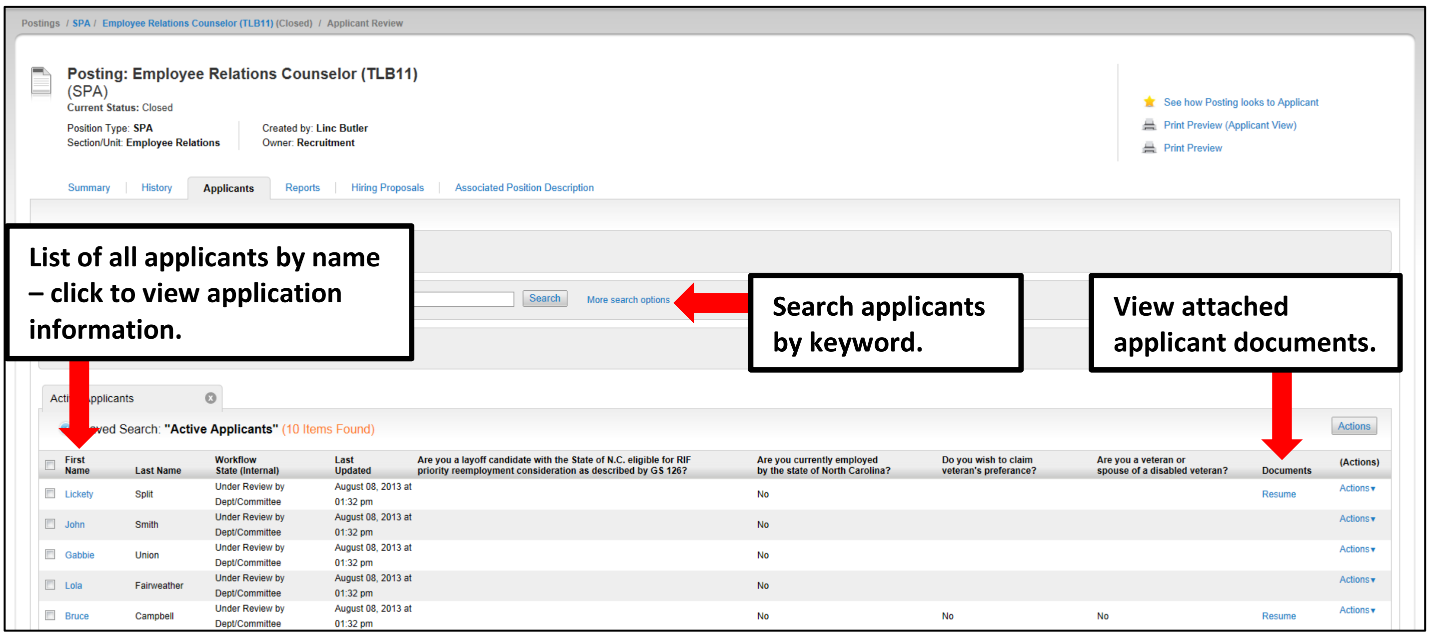


Once you identify the posting you would like to begin reviewing applicants for, go to the **Actions** button in the far right-hand column and select **"View Applicants"**:

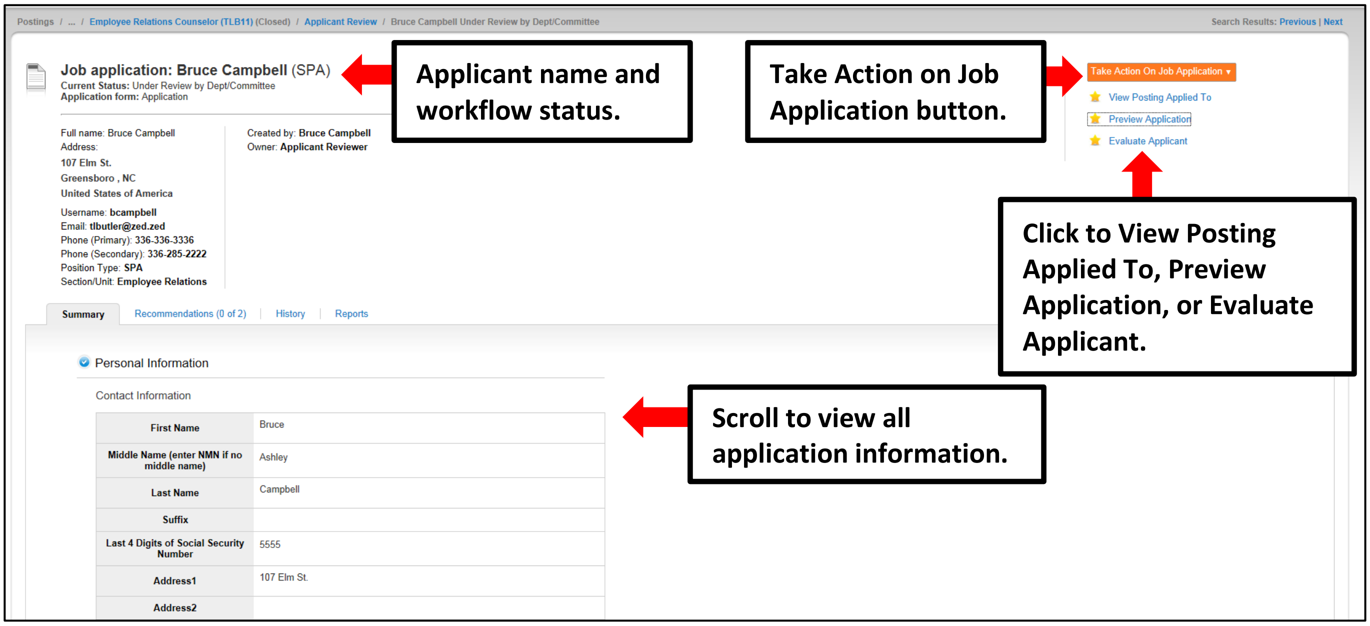


Applicant Review – Applicants Tab

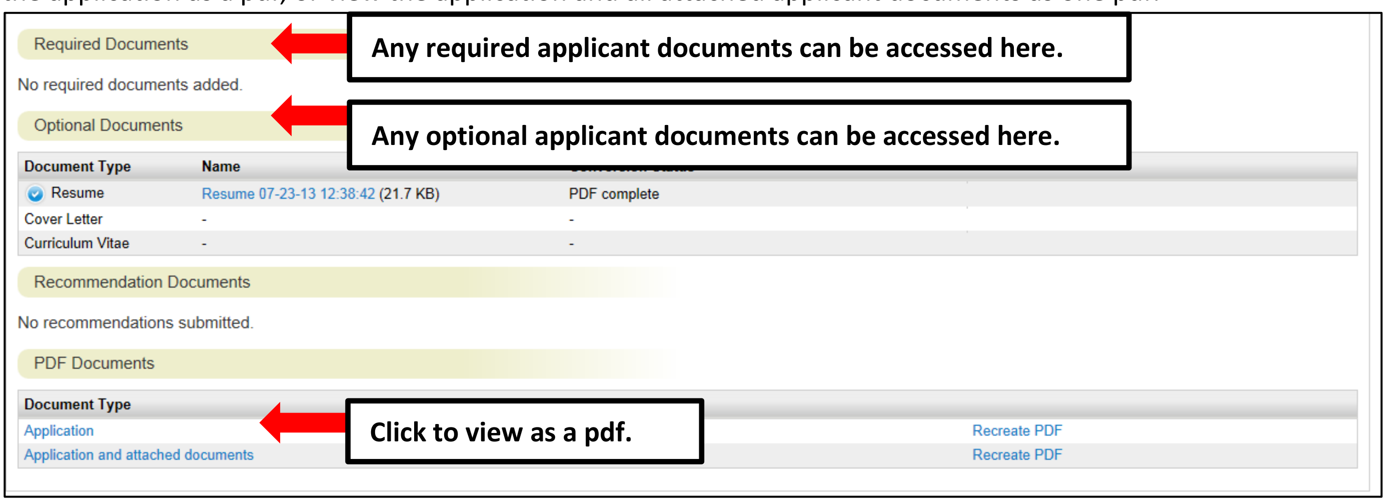
You will then be taken to the **Applicants** tab of the posting where you will see a list of all the applicants who have applied to the posting. In this view, you can search for applicants by keyword, and searches can be customized and saved for later use. You can also access any attached applicant documents 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.



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. :

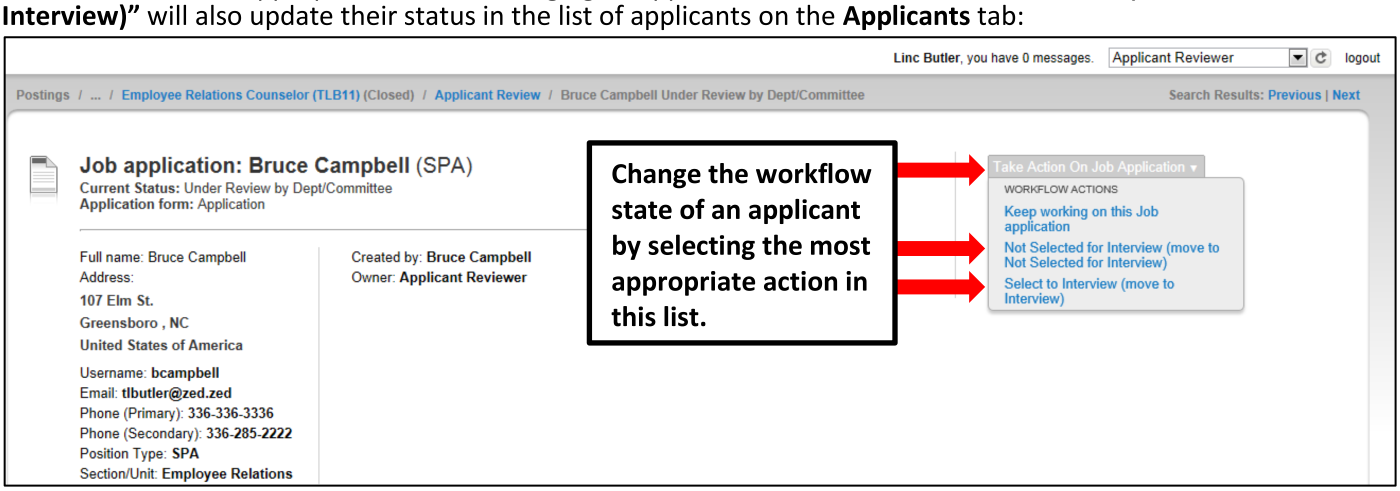


At the bottom of the **Job Application** view, you can view attached applicant documents. You can also view the application as a pdf, or view the application and all attached applicant documents as one pdf:

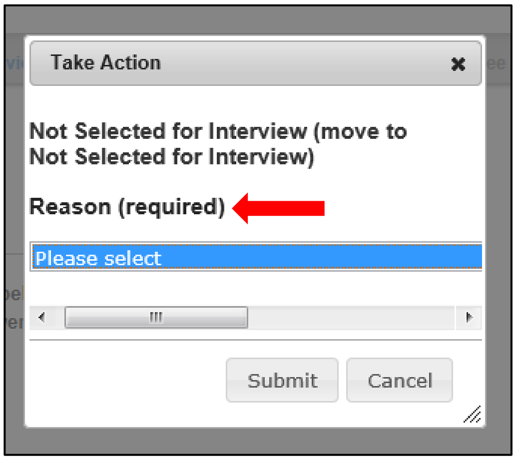


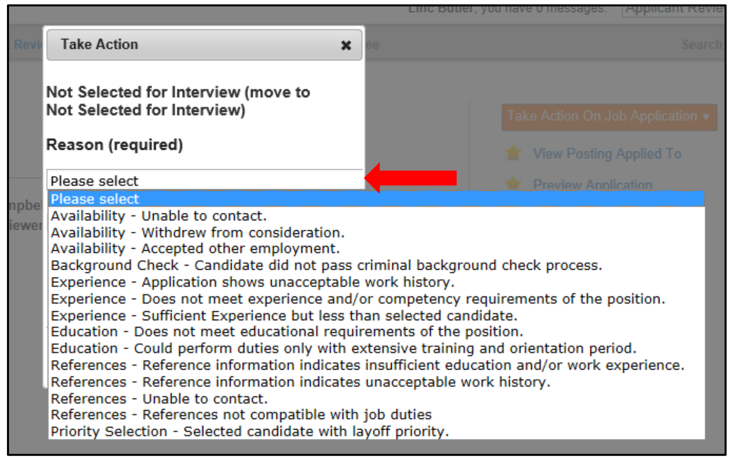
Applicant Review – Changing the Workflow State for an Applicant

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:



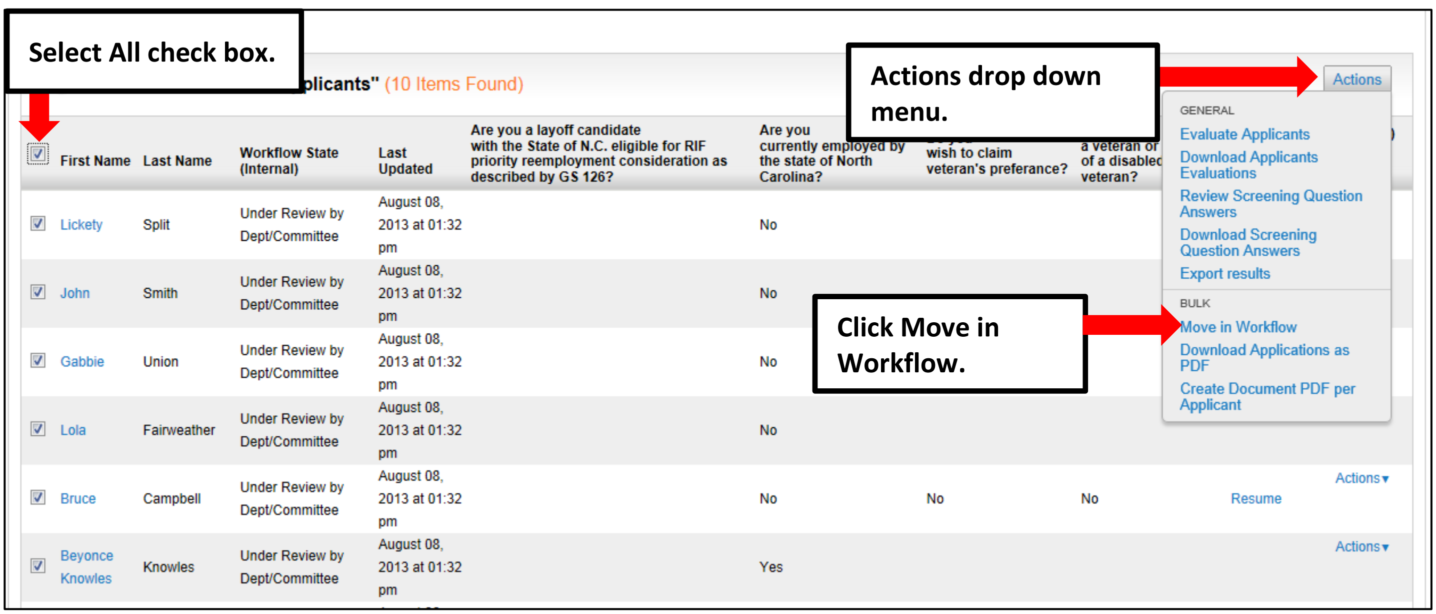
If you change an applicant's workflow state to **"Not Selected for Interview (move to Not Selected for Interview)"**, you will be **required** to select the most appropriate non-selection reason for that applicant. Once an applicant's workflow status is changed to **"Not Selected for Interview (move 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:



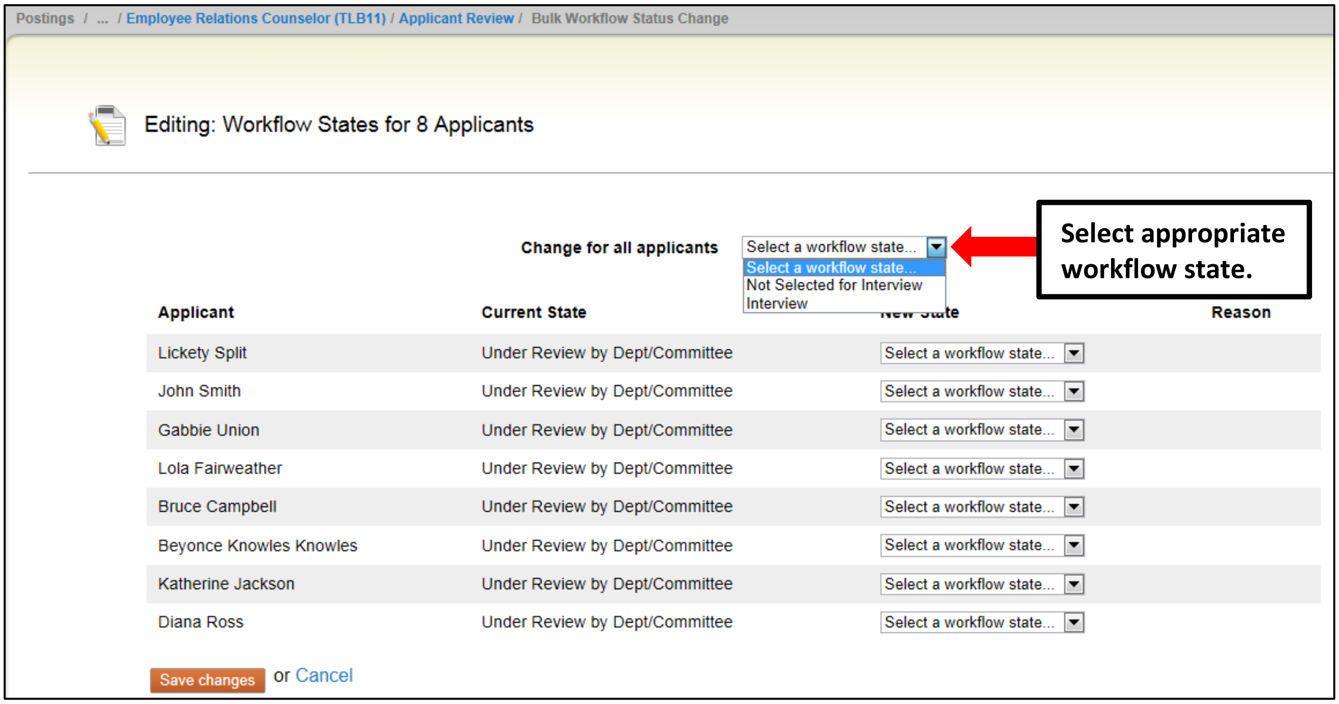


Applicant Review – Changing the Workflow States for a Group of Applicants

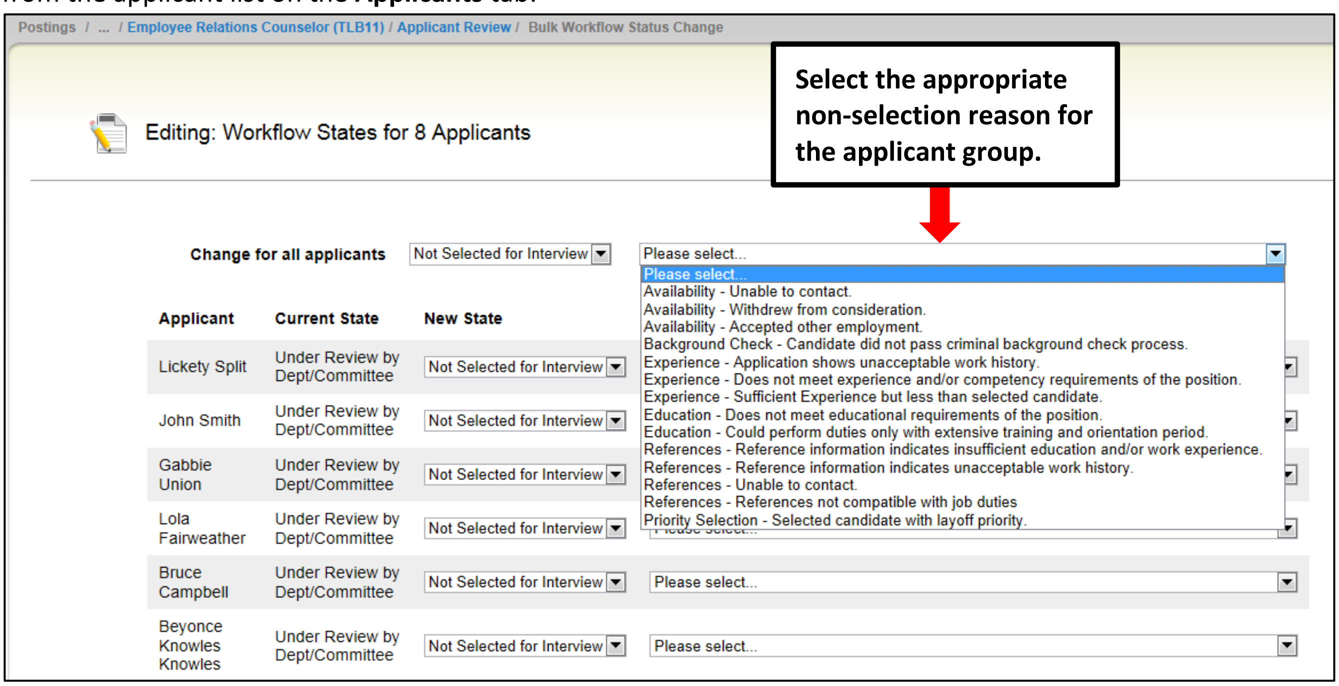
To change the workflow state for a group of applicants at the same time, go to the **Applicants** tab of the posting and click the Select All check box to select all applicants in the applicant list. Then hover your cursor over the **Actions** button and select **"Move in Workflow"**.

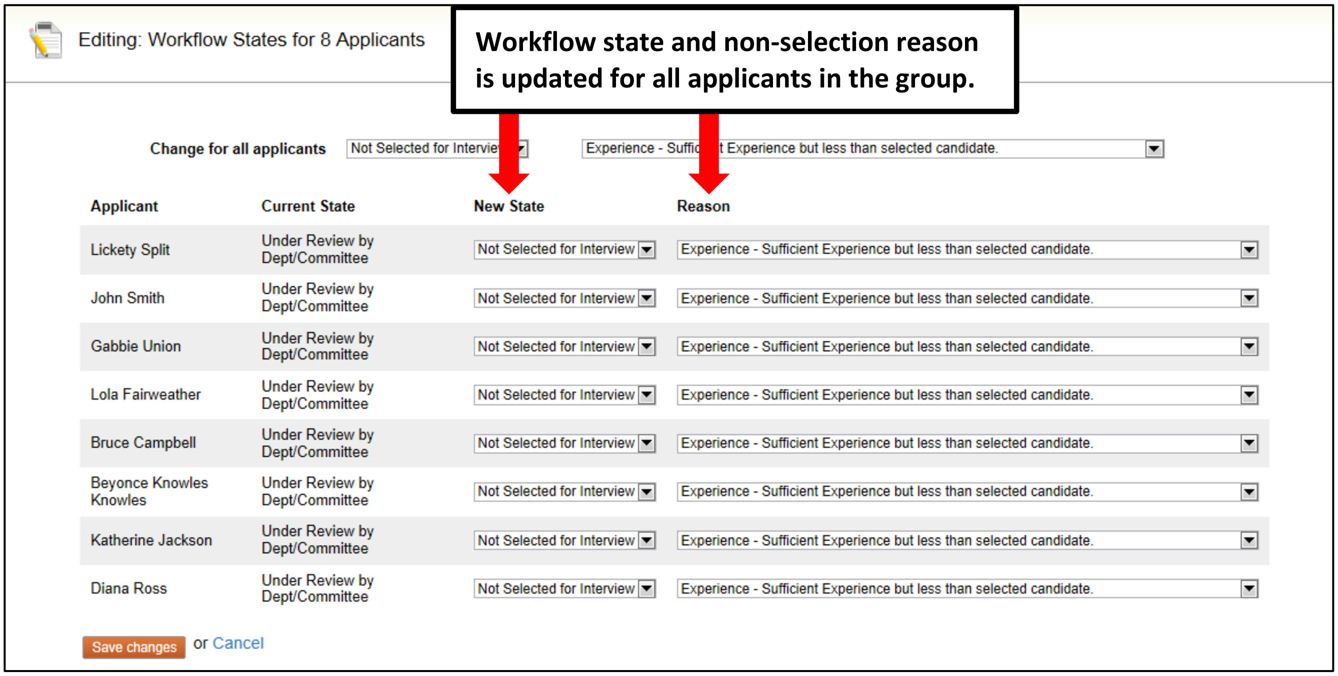


First select the appropriate workflow state for the group of applicants in the **"Change for all Applicants"** drop down menu. Changing an applicant's workflow state to **"Interview (move to Interview)"** will also update their status in the list of applicants on the **Applicants** tab:

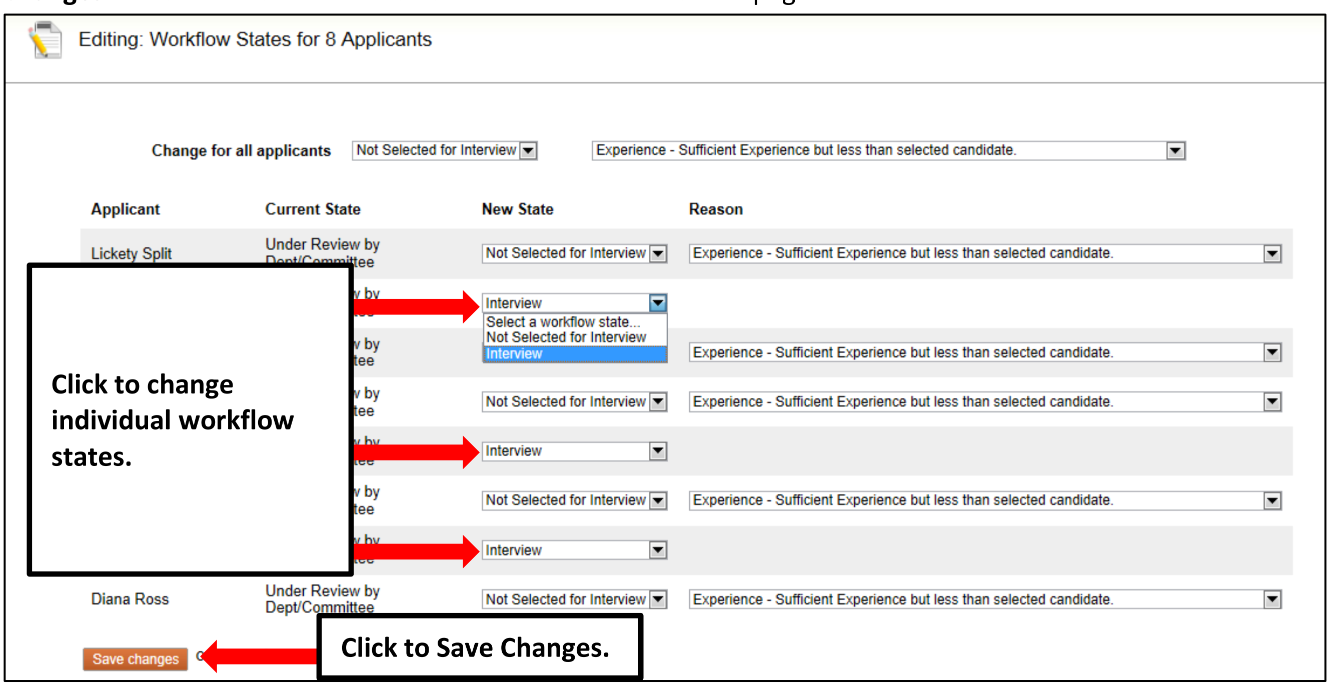


If you change the applicant group's workflow state to **"Not Selected for Interview (move to Not Selected for Interview)"**, you will then be **required** to select the most appropriate non-selection reason for the applicant group. Once an applicant's workflow status is changed to **"Not Selected for 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:



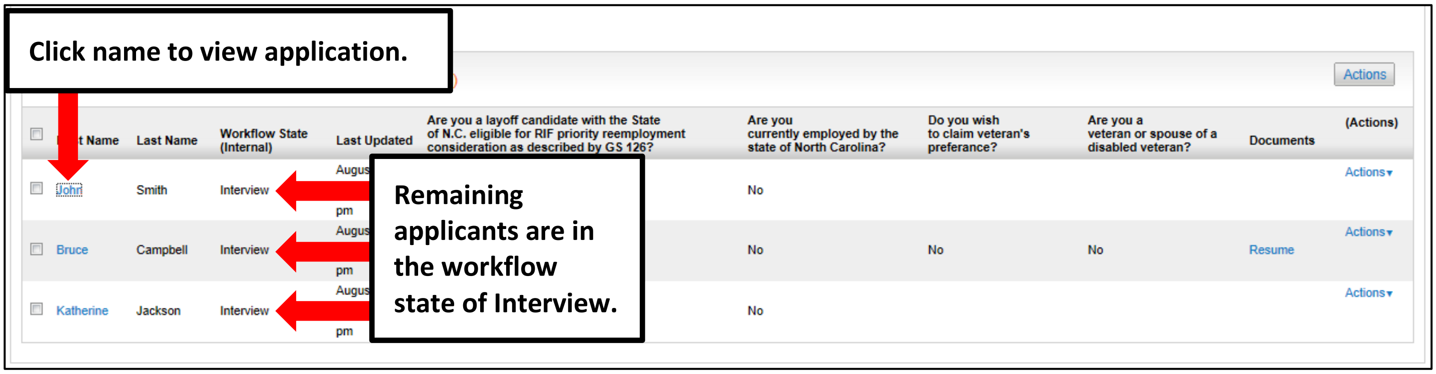


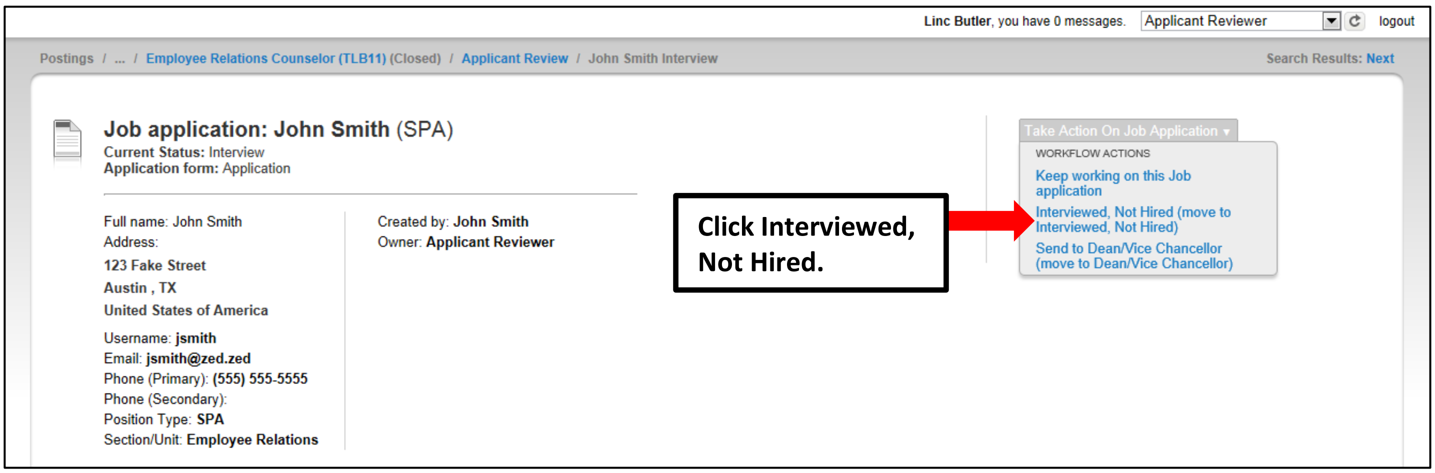
You can also make changes to individual applicants in the list by clicking on the drop down list in the **New State** column and selecting the appropriate workflow state. When finished making updates, click the **Save Changes** button located on the bottom left-hand corner of the page:

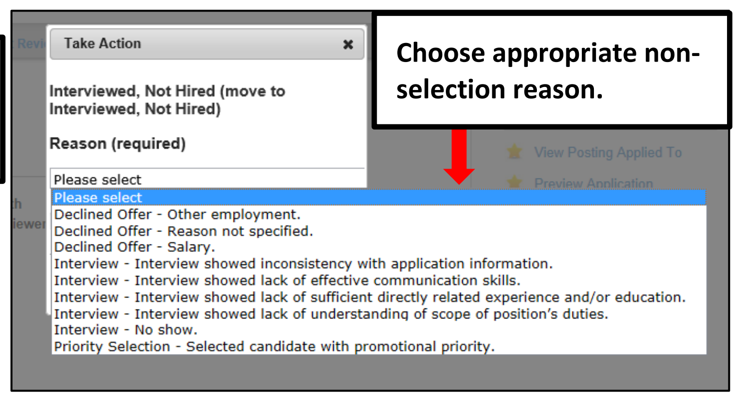


Applicant Review – Routing your Selected Candidate for Approval

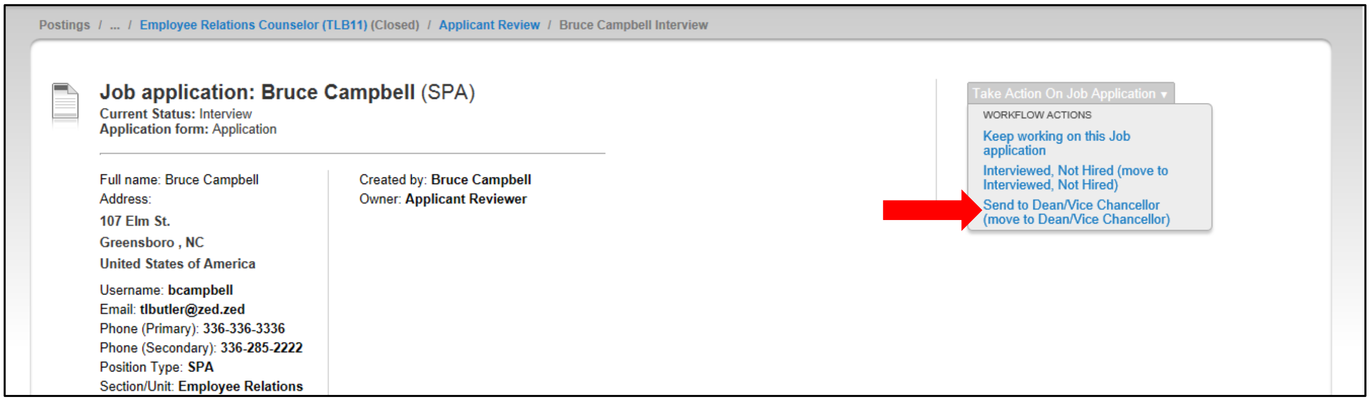
Once you have completed interviews, checked references, and identified a selected candidate, you can then route your selected candidate through the candidate approval workflow within your School, College, or Division to the EEO Approval workflow state. You must first change the workflow state of all non-selected 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:

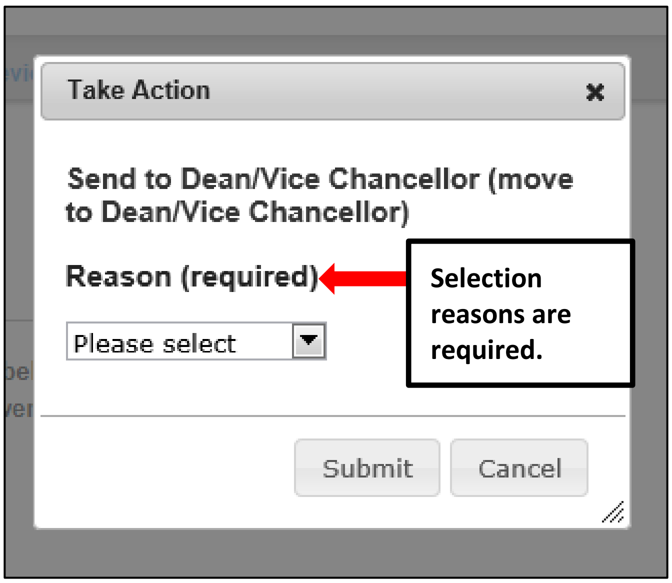


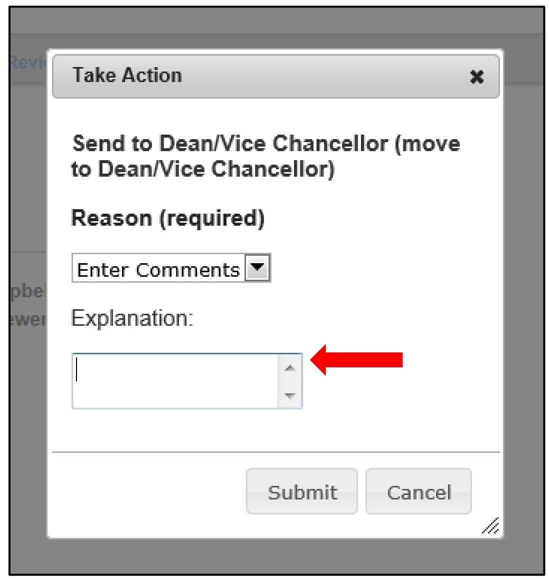




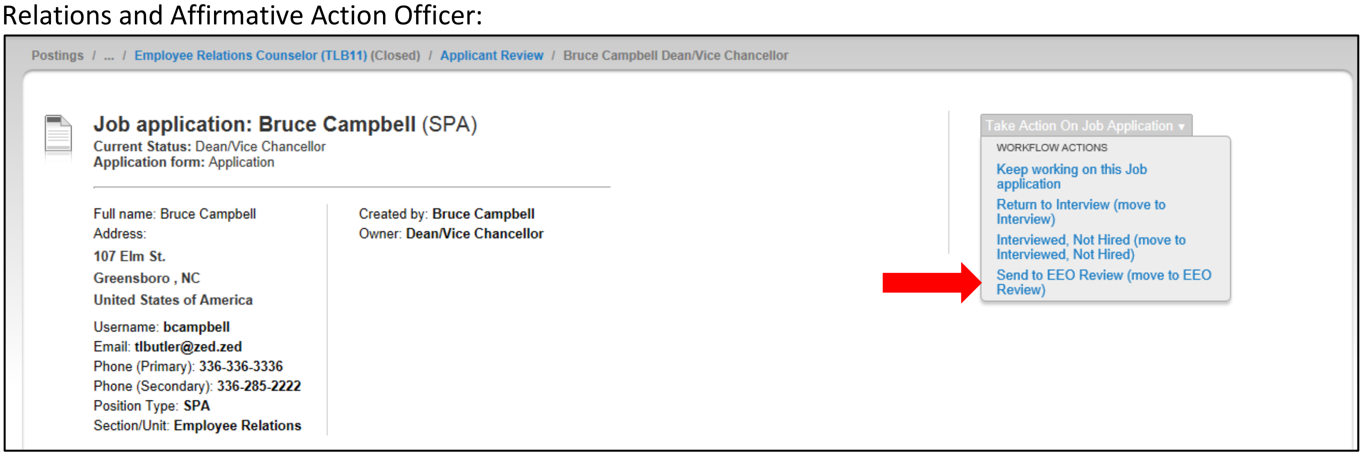
You can then route the selected candidate to the next step in the candidate approval workflow by hovering your cursor over the **Take Action On Job Application** button located in the top right-hand corner of the selected candidate's Job Application view and selecting the appropriate next step. In this 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:





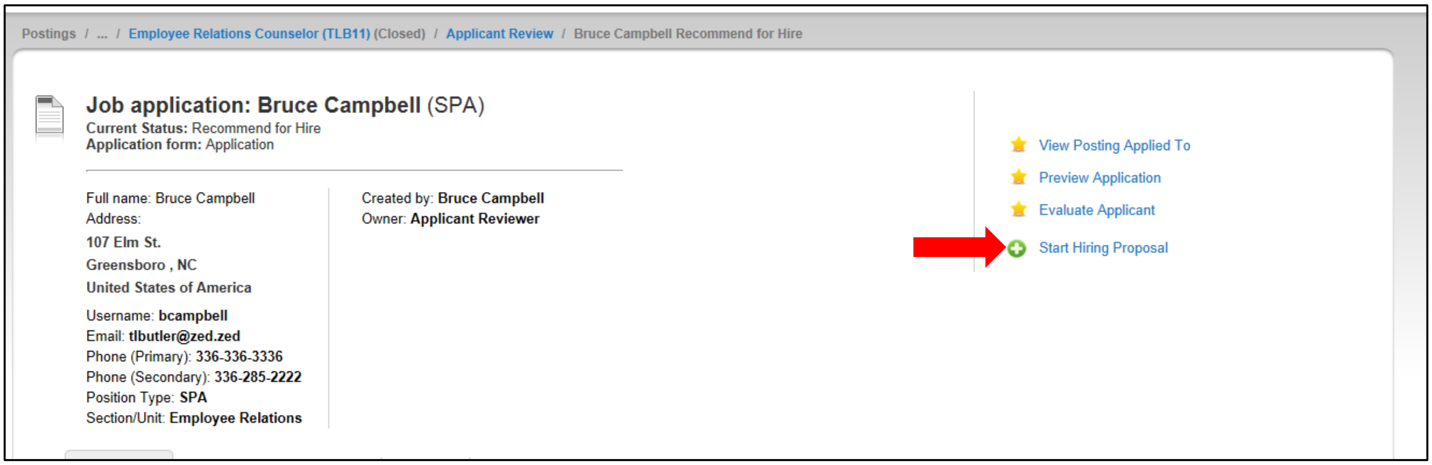


Once the selected candidate has been approved by all levels of your School, College, or Division, the next step in the workflow is to route the selected candidate to DHR for **EEO Review** by the Director of Employee Relations and Affirmative Action Officer:

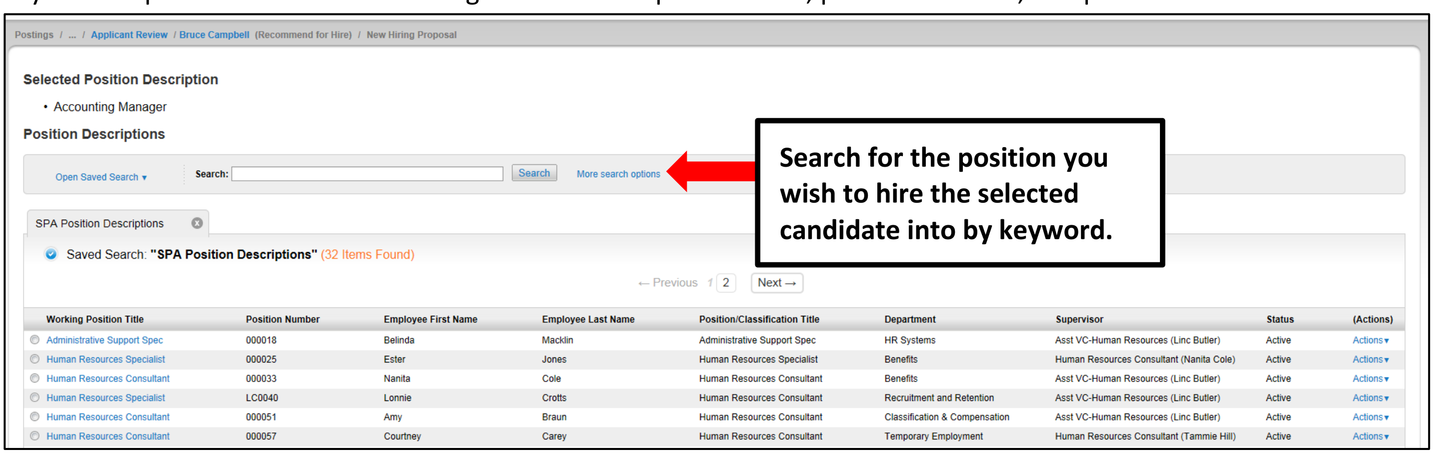


Hiring Proposal

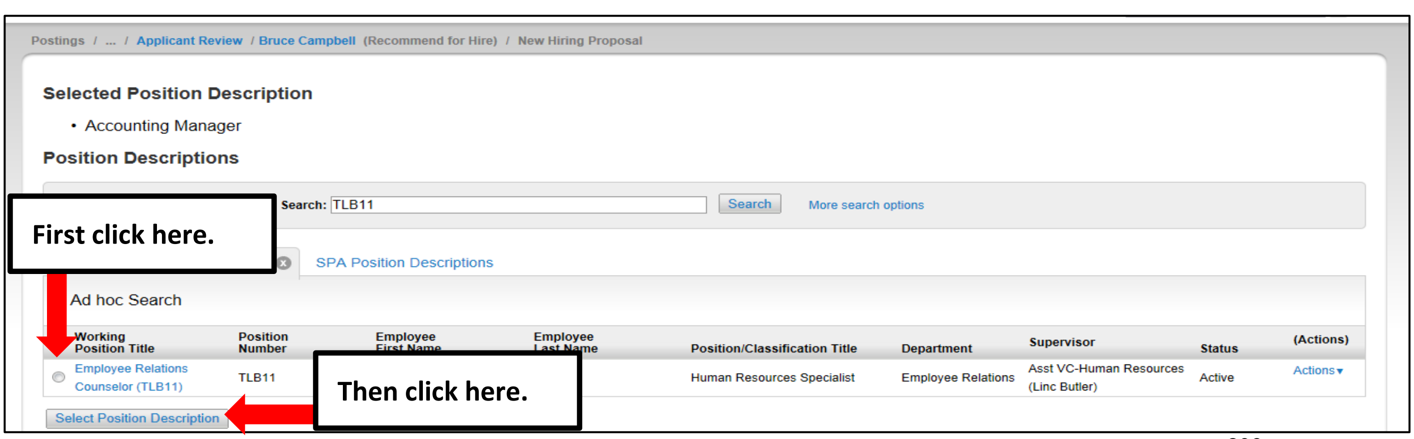
Once you have been notified that your selected candidate has been moved to the workflow state of **Recommended for Hire** by the Director of Employee Relations and Affirmative Action Officer, you can then start a Hiring Proposal by navigating to the Job Application view for that selected candidate and clicking on the **Start Hiring Proposal** link located on the top right-hand corner of the page:



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:

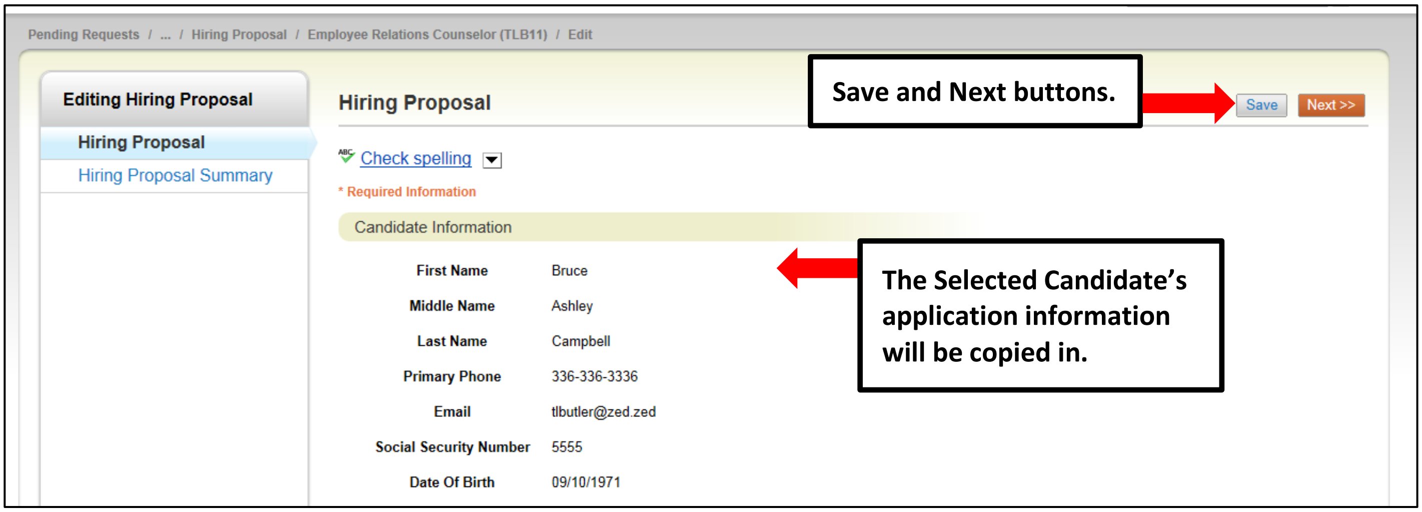


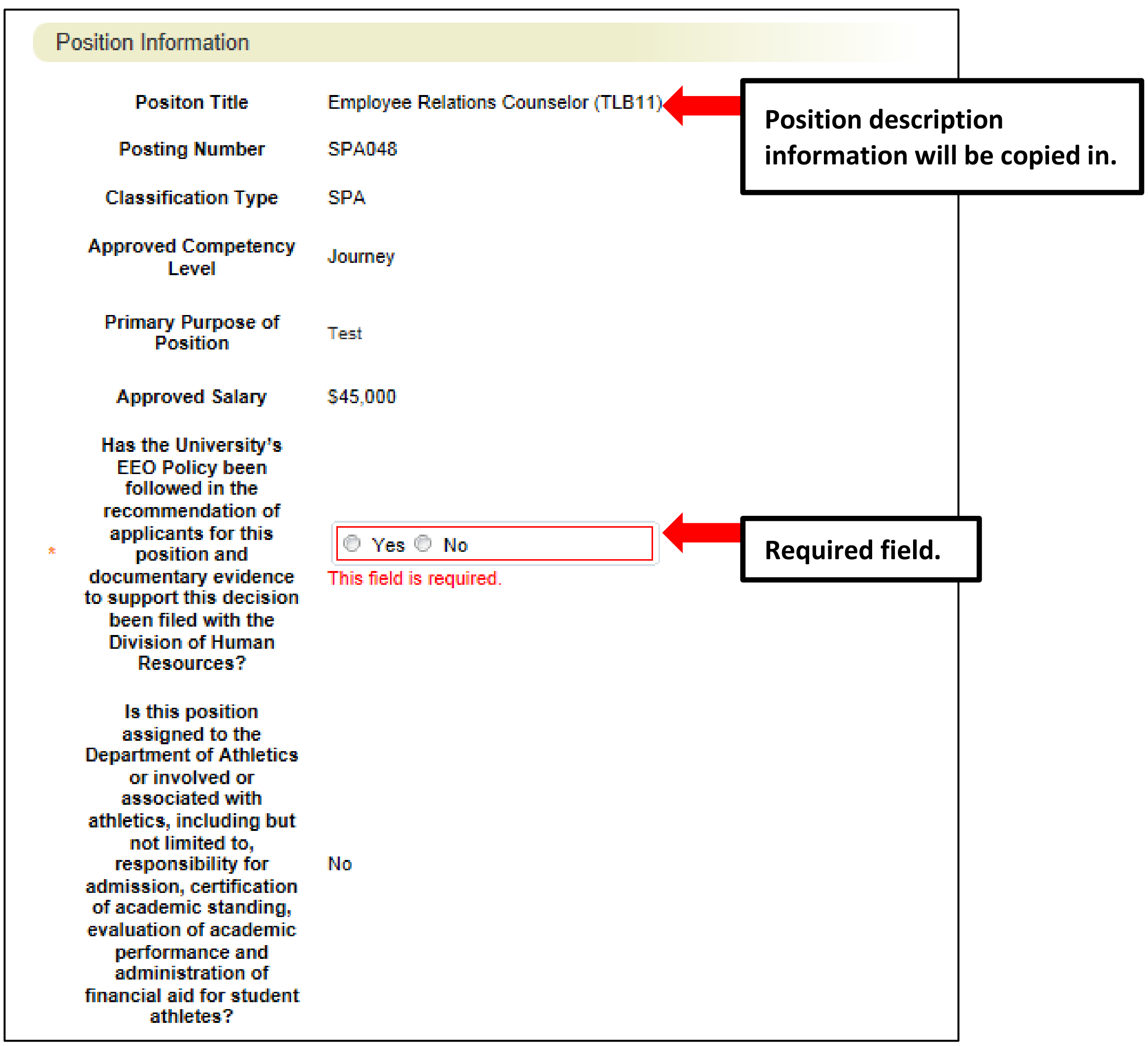
When you locate the desired position description, select it by clicking the radio button to the left of the **Working Position Title**, then click the **Select Position Description** button located on the bottom left-hand corner of the page:

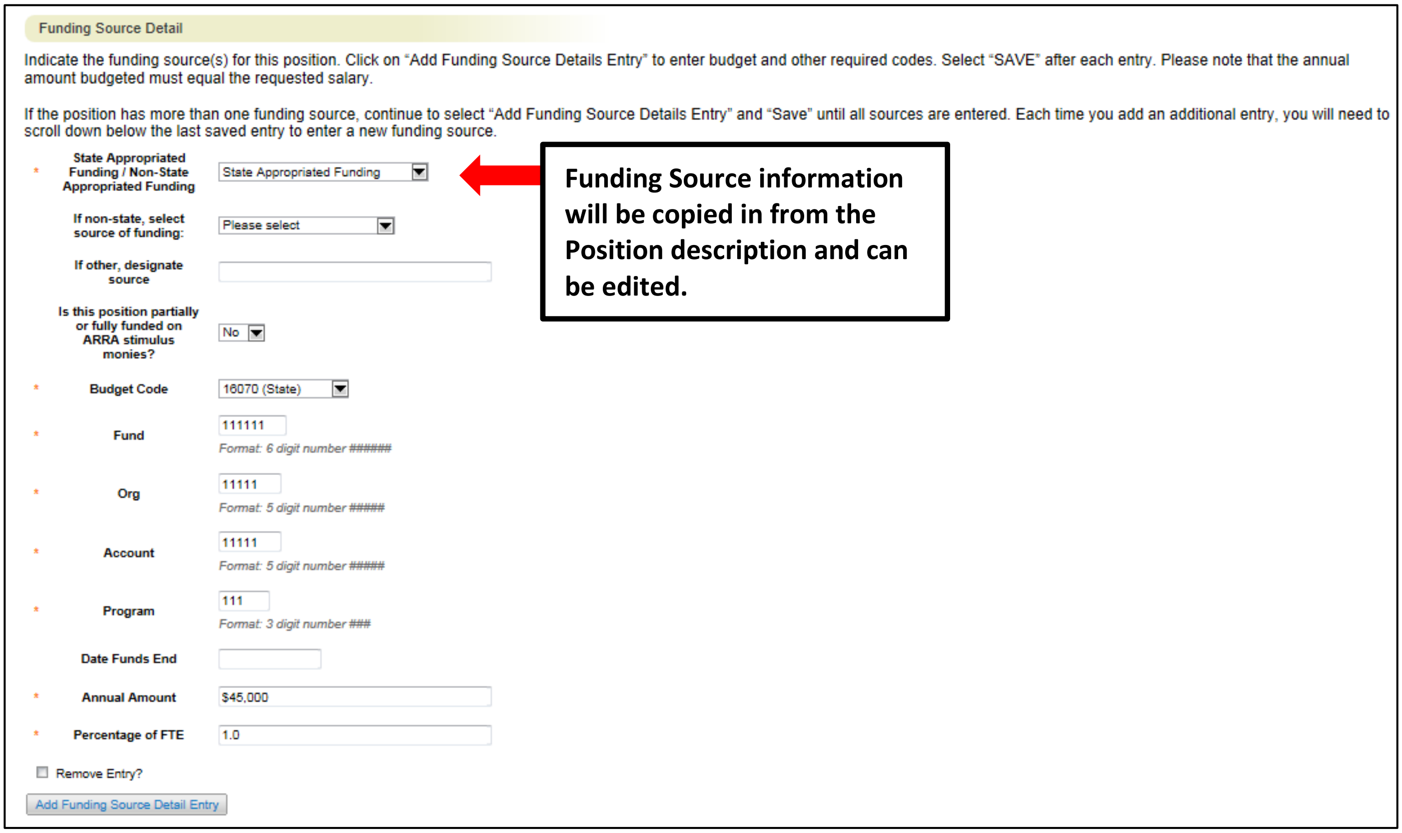


Hiring Proposal – Hiring Proposal Tab

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**:







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.

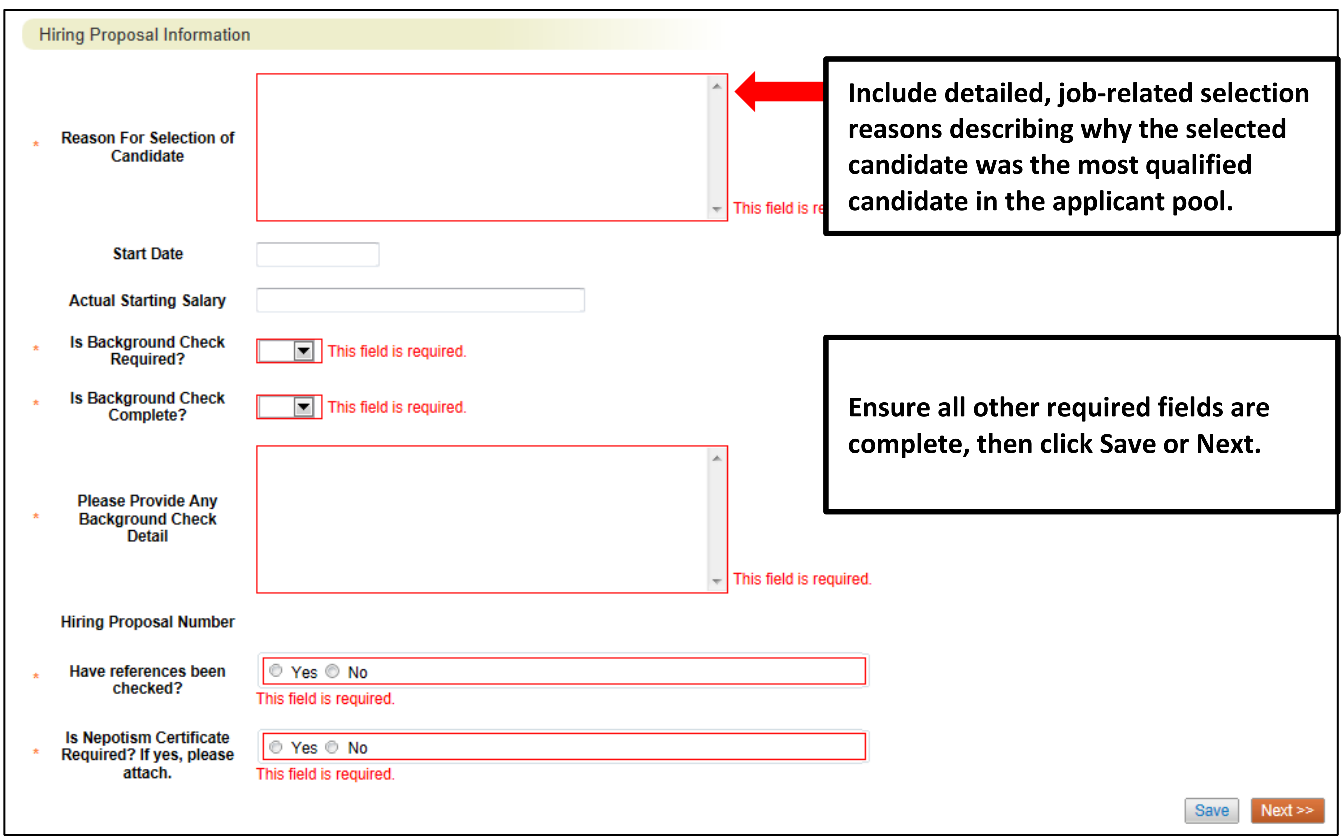
If the position has more than one funding source, continue to select "Add Funding Source Details Entry" and "Save" until all sources are entered. Each time you add an additional entry, you will need to scroll down below the last saved entry to enter a new funding source.

* State Appropriated Funding / Non-State Appropriated Funding	State Appropriated Funding
If non-state, select source of funding:	Please select
If other, designate source	
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 Entry

Funding Source information will be copied in from the Position description and can be edited.



Hiring Proposal Information

* Reason For Selection of Candidate	This field is re
Start Date	
Actual Starting Salary	
* Is Background Check Required?	This field is required.
* Is Background Check Complete?	This field is required.
* Please Provide Any Background Check Detail	This field is required.
Hiring Proposal Number	
* Have references been checked?	Yes No This field is required.
* Is Nepotism Certificate Required? If yes, please attach.	Yes No This field is required.

Save Next >>

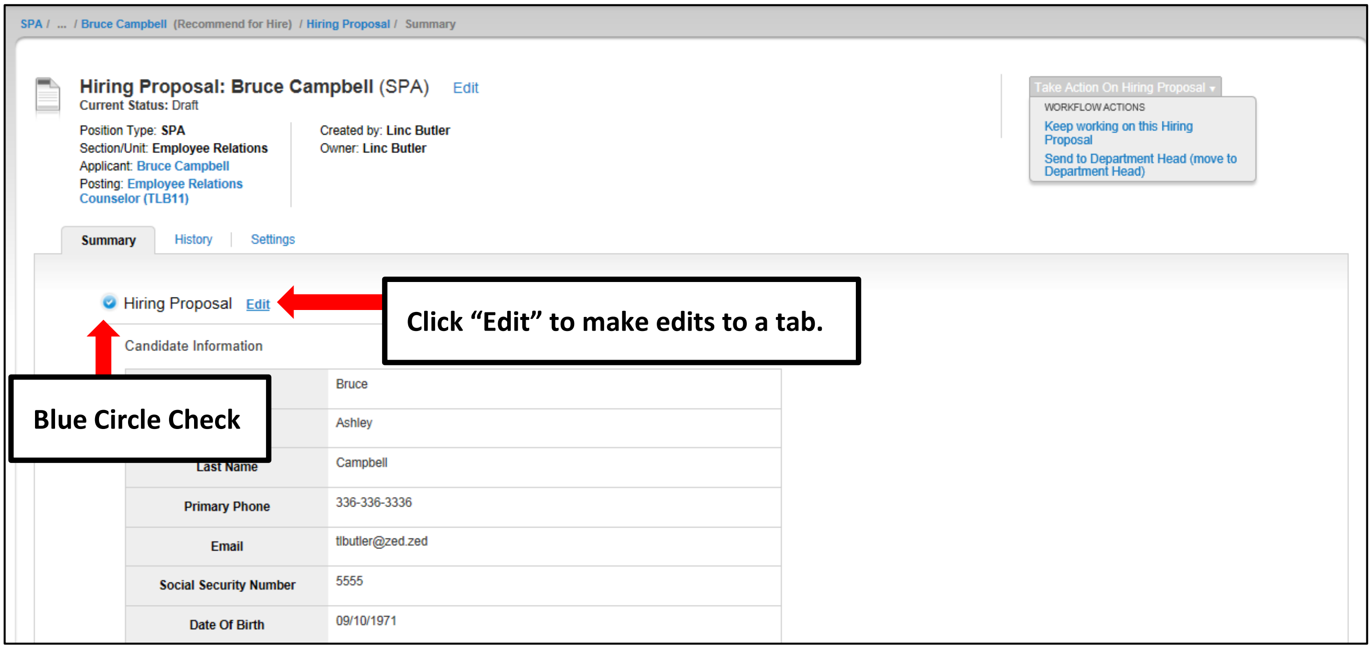
Include detailed, job-related selection reasons describing why the selected candidate was the most qualified candidate in the applicant pool.

Ensure all other required fields are complete, then click Save or Next.

Hiring Proposal – Hiring Proposal Summary Tab

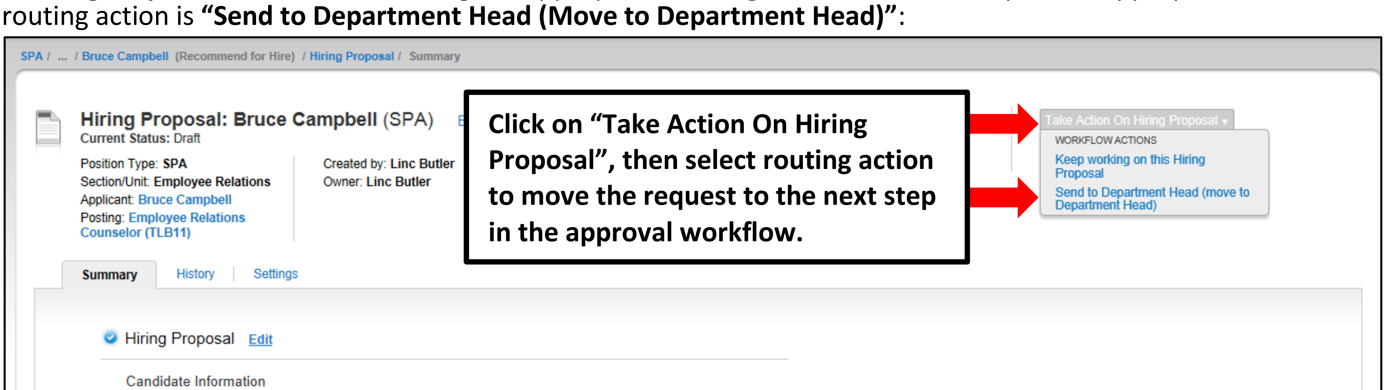
The **Hiring Proposal Summary Tab** allows you to perform a final review all information you've entered on the previous tab prior to sending the request to the next step in the approval workflow. Please review the details of the posting summary carefully before continuing.

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

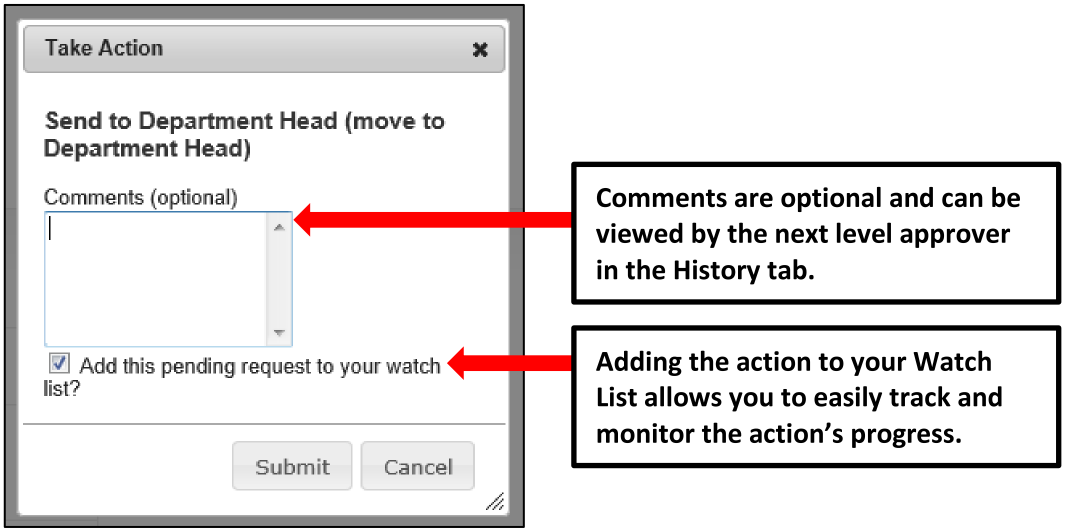


An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on **"Edit"** to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click **"Save",** and then return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

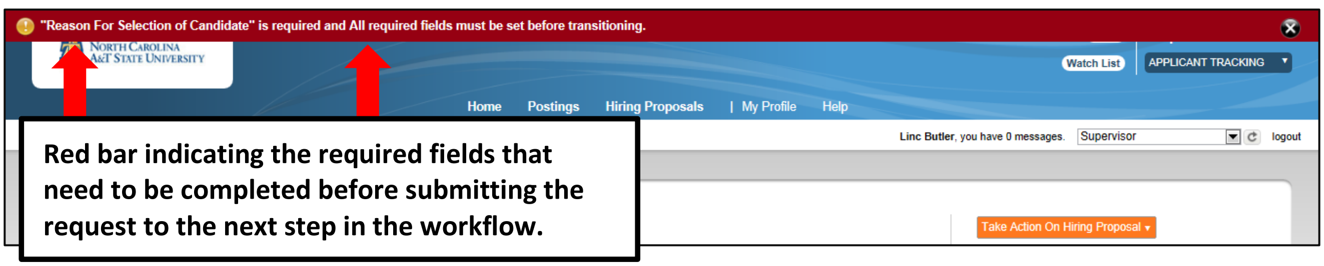
Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **"Take Action on Pending Request"** button and selecting the appropriate routing action. In this example,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



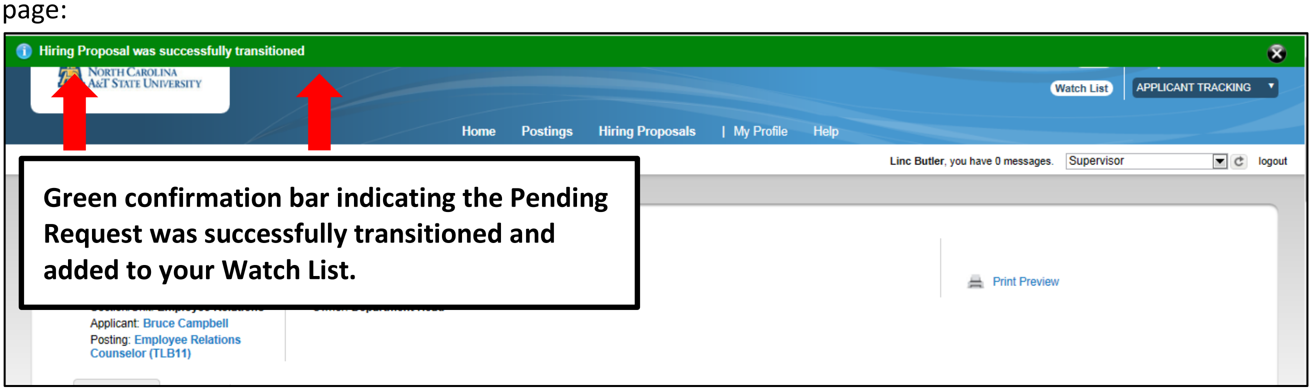
You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send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



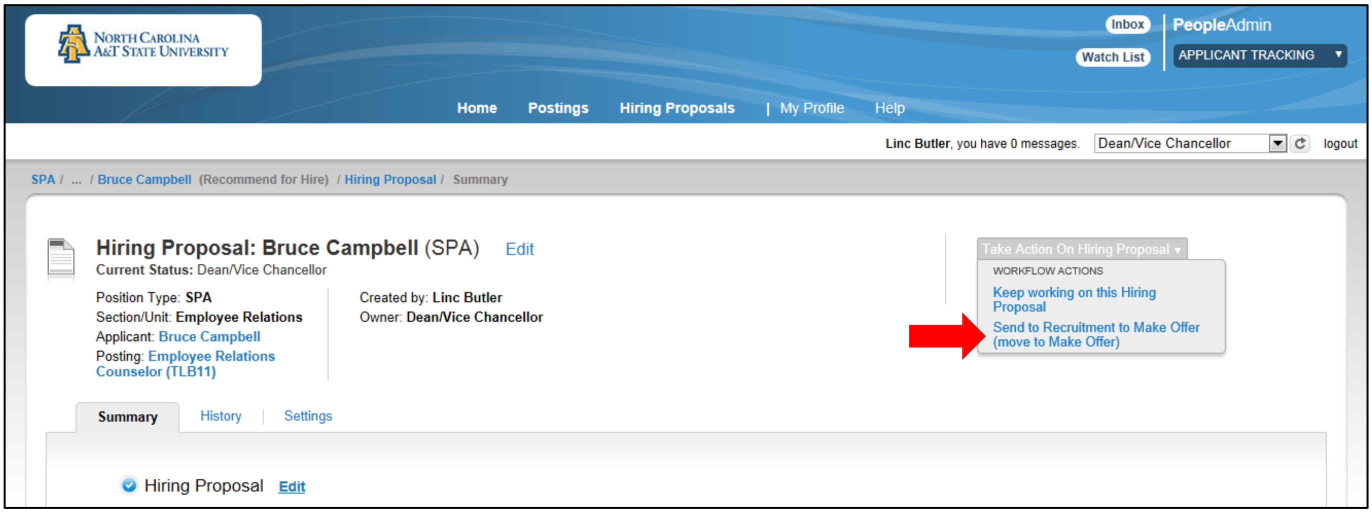
If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation:



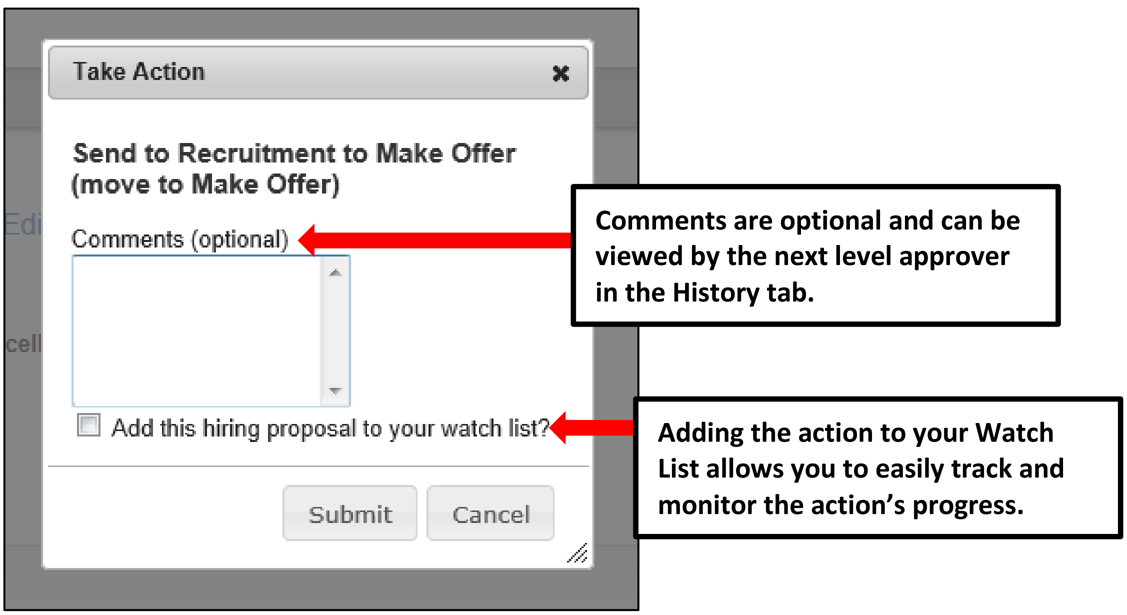
Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:



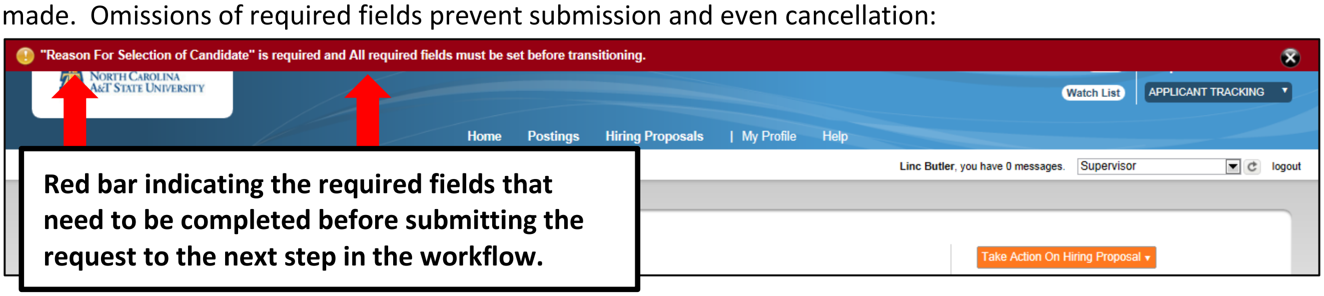
The next level approver (the Department Head in this example) will receive the pending Hiring Proposal request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, 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:



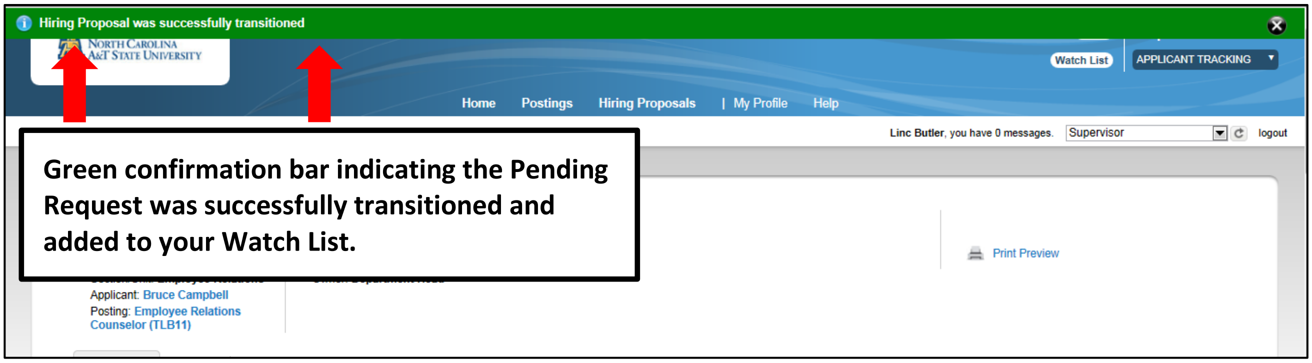
You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you're ready to send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



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

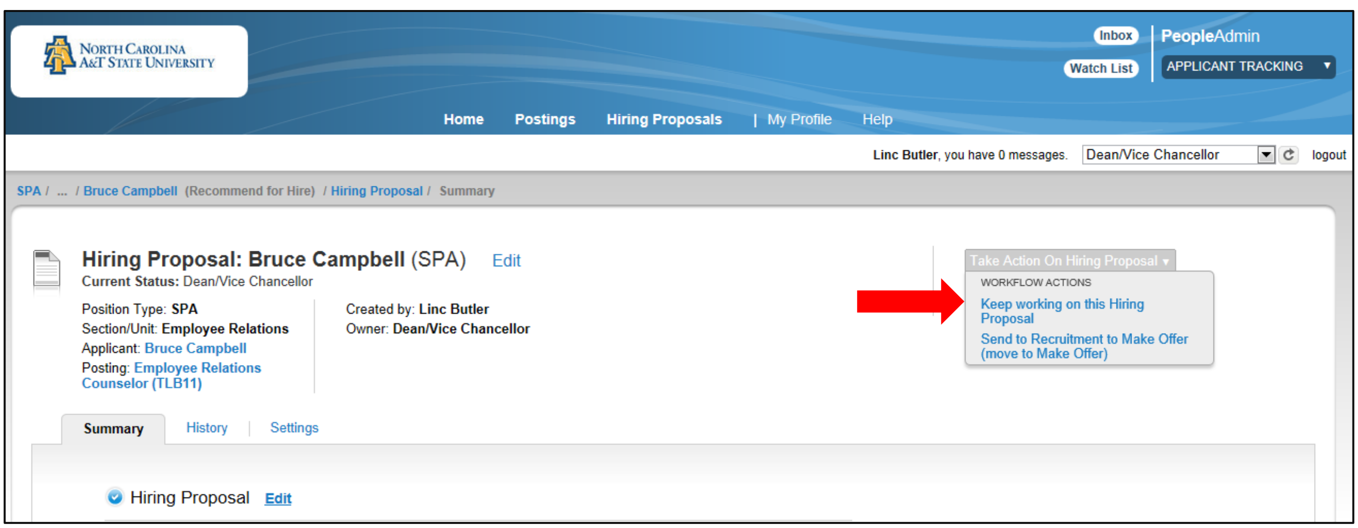


The next level approver (the Department Head in this example) will receive the pending Hiring Proposal request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, 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).

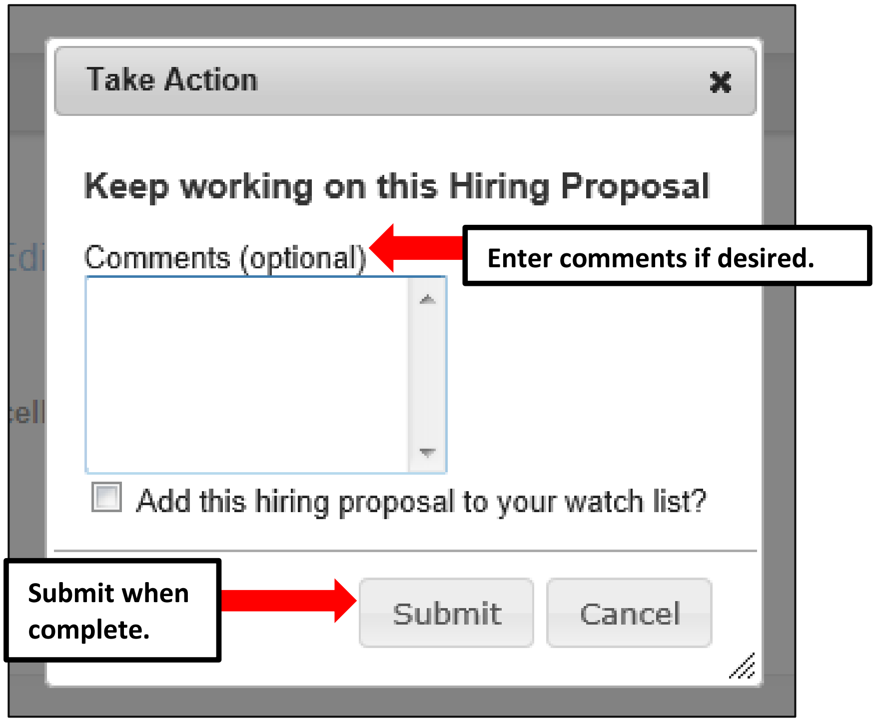
Hiring Proposal - Saving to Return to a Pending Request Later

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"



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.