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.

1. System Basics

- Accessing the PeopleAdmin Site and How to Log In
- Home Page
- Alerts, Inbox and Watch List
- Accessing and Approving Actions from the Inbox
- Using the Watch List
- Shortcuts and My Links
- <u>Switching Between User Types</u>
- Making Changes to Your Default Login Page

2. Position Management

- Create New Position Description
 - Create New SHRA Positions
 - Edit Pending Request Page General Navigation
 - Saving to Return to a Pending Request Later
 - Position Action Justification Tab
 - <u>SHRA Classification Tab</u>
 - <u>SHRA Position Details Tab</u>
 - SHRA Position Details Tab Competencies and Related Job Duties
 - Position Details Compliance and Requirements
 - Position Funding Tab
 - Add ADA Checklist Form Tab
 - <u>Supplemental Documents Tab</u>
 - Supervisor Tab
 - Pending Request Summary Tab

• Create New EHRA Positions

- Edit Pending Request Page General Navigation
- Saving to Return to a Pending Request Later
- Position Action Justification Tab
- <u>EHRA Classification Tab</u>
- <u>EHRA Position Details Tab</u>
- EHRA Position Details Tab Primary Responsibilities and Duties
- Position Details Compliance and Requirements
- Position Funding Tab
- Add ADA Checklist Form Tab
- EHRA Designation Request Form
- <u>Supplemental Documentation Tab</u>
- Supervisor Tab
- Pending Request Summary Tab
- Create New Post Doctoral
 - Edit Pending Request Page General Navigation
 - Saving to Return to a Pending Request Later

• Create New Post Doctoral (Continued)

- <u>Position Action Justification Tab</u>
- Post Doctoral Classification Tab
- Post Doctoral Position Details Tab
- Post Doctoral Position Details Tab -Primary Responsibilities
- Position Details Compliance and Requirements
- Position Funding Tab
- Add ADA Checklist Form Tab
- Supplemental Documentation Tab
- Supervisor Tab
- Pending Request Summary Tab

Modify Position Description

- Modify SHRA Positions
 - Edit Pending Request Page General Navigation
 - Saving to Return to a Pending Request Later
 - Position Action Justification Tab
 - <u>SHRA Classification Tab</u>
 - <u>SHRA Position Details Tab</u>
 - SHRA Position Details Tab Competencies and Related Job Duties
 - Position Details Compliance and Requirements
 - Position Funding Tab
 - Add ADA Checklist Form Tab
 - <u>Supplemental Documents Tab</u>
 - Supervisor Tab
 - Pending Request Summary Tab
- Modify EHRA Positions
 - Edit Pending Request Page General Navigation
 - Saving to Return to a Pending Request Later
 - Position Action Justification Tab
 - <u>EHRA Classification Tab</u>
 - <u>EHRA Position Details Tab</u>
 - EHRA Position Details Tab Primary Responsibilities and Duties
 - Position Details Compliance and Requirements
 - Position Funding Tab
 - Add ADA Checklist Form Tab
 - Designation Request Form Tab
 - <u>Supplemental Documents Tab</u>
 - <u>Supervisor Tab</u>
 - Pending Request Summary Tab
- Modify Post Doctoral Positions
 - Edit Pending Request Page General Navigation
 - Saving to Return to a Pending Request Later
 - Position Action Justification Tab
 - Post Doctoral Classification Tab
 - Post Doctoral Position Details Tab
 - Position Doctoral Position Details Tab Primary Responsibilities and Duties
 - Position Details Compliance and Requirements
 - Position Funding Tab
 - Add ADA Checklist Form Tab
 - Supplemental Documents Tab
 - Supervisor Tab
 - Pending Request Summary Tab

3.Applicant Tracking

- Create New Posting General Navigation
- Create New SHRA Posting Create From Posting
 - o Posting Details Tab
 - o Position Funding Information Tab
 - Supplemental Questions Tab
 - Applicant Documents Tab
 - o <u>Search Committee Tab</u>
 - o Ranking Criteria Tab
 - o <u>Posting Documents Tab</u>
 - o <u>Summary Tab</u>
 - o <u>Saving to Return to a Pending Request Later</u>
- <u>Create New SHRA Posting Create from Position Description</u>
 - o Posting Details Tab
 - Position Funding Information Tab
 - o Supplemental Questions Tab
 - o Applicant Documents Tab
 - o <u>Search Committee Tab</u>
 - o <u>Ranking Criteria Tab</u>
 - o <u>Posting Documents Tab</u>
 - o <u>Summary Tab</u>
 - o Saving to Return to a Pending Request Later
- Create New EHRA Posting
- <u>Create New EHRA Posting from an Existing Posting</u>
 - o <u>Edit Posting</u>
 - o Posting Details Tab
 - o Position Funding Information Tab
 - o <u>Supplemental Questions Tab</u>
 - o <u>Applicant Documents Tab</u>
 - o <u>References / Letters of Recommendation Tab</u>
 - o <u>Search Committee Tab</u>
 - o Ranking Criteria Tab
 - o Posting Documents Tab
 - o <u>Summary Tab</u>
 - o Saving to Return to a Pending Request Later
- Create New EHRA Posting from a Position Description
 - o Posting Details Tab
 - o <u>Position Funding Information Tab</u>
 - o <u>Supplemental Questions Tab</u>
 - Applicant Documents Tab
 - o <u>References / Letters of Recommendation Tab</u>
 - o <u>Search Committee Tab</u>
 - o Ranking Criteria Tab
 - o <u>Posting Documents Tab</u>
 - o <u>Summary Tab</u>
 - o <u>Saving to Return to a Pending Request Later</u>
- Create New Post Doctoral Posting
- <u>Create New Post Doctoral Posting from an Existing Posting</u>
 - o Posting Details Tab
 - o <u>Position Funding Information Tab</u>
 - o <u>Supplemental Questions Tab</u>
 - o Applicant Documents Tab
 - o <u>References / Letters of Recommendation Tab</u>

• Create New Post Doctoral Posting from an Existing Posting (Continued)

- o <u>Search Committee Tab</u>
- o Ranking Criteria Tab
- Posting Documents Tab
- o <u>Summary Tab</u>
- o <u>Saving to Return to a Pending Request Later</u>

<u>Create New Post Doctoral Posting from a Position Description</u>

- o Posting Details Tab
- o <u>Position Funding Information Tab</u>
- o <u>Supplemental Questions Tab</u>
- o Applicant Documents Tab
- o <u>References / Letters of Recommendation Tab</u>
- o <u>Search Committee Tab</u>
- o Ranking Criteria Tab
- o <u>Posting Documents Tab</u>
- o <u>Summary Tab</u>
- o <u>Saving to Return to a Pending Request Later</u>

Applicant Review

- o Postings View
- o <u>Applicants Tab</u>
- Changing the Workflow State for an Applicant
- o <u>Changing the Workflow States for a Group of Applicants</u>
- Routing your Selected Candidate for Approval

Hiring Proposal

- o <u>Hiring Proposal Tab</u>
- o <u>Hiring Proposal Summary Tab</u>
- o <u>Saving to Return to a Pending Request Later</u>

Section 1: System Basics

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

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

• https://jobs.ncat.edu/hr

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

Enter your Username and Password here.	NORTH CAROLINA A&T STATE UNIVERSITY
	This system is optimized for the Google Chrome and Mozilla Firefox web browsers.
	Username
	Password
	Login
	First time here? <u>Request an account</u>
	Forgot your password? <u>Request a password reset</u>
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:
 - o A lowercase letter
 - o An uppercase letter
 - A numerical digit (1, 2, 3, 4, etc.)
 - Special character (#, \$, %, &, etc.)

Home Page Elements

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

What has changed?

New Layout

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

					Shortcuts
ome Postings - Hiring Prop Velcome to your Online Recruitment an		t Svstem			Shortcuts
Alerts (1 alert from the administrator)	•	,			0 Active Applicants
TYPE MESSAGE					
description in the Position Description MM Management" (orange header) in the dro select the "Positions Description" tab next instructions on the page for "modify an e to "Home" and the appropriate position t follow the instructions provided on the pa Economic Development: > If you have qu Links section on the right side of this pag	p-down menu in the far upper t to "Home" and the appropriat xisting position"; > If this is a ne ype: SHRA or EHRA, and follow age; > Post doctoral recruitmer estions or need assistance plea	right of your te position type w position se the instruction it is initiated to	screen; > If this is an oper SHRA or EHRA, and elect the "Positions De ons on the page for "Co by contacting the Division of	existing position d follow the escription" tab next reate New" and sion of Research and	Evaluated Applicants Unevaluated Applicants
Inbox	F	Postings 🛛	Hiring Proposais	Pending Requests	
SEARCH					2 Committees Served By Department last 365 Day
1				Filters	
	CURRENT S	TATE	DAYS IN CURRENT	STATE	
TITLE	Closed		619		
TITLE Assistant Dean/Associate Professor Dean's Office - Library Services			307		Office of Admissions - Director
Assistant Dean/Associate Professor	Posted				Provost/VC for Acad Aff

New feature – Graphical Data

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

New Inbox

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

New Watchlist Functionality

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

System Basics - Switching Between User Types

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

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

	Hire				Welcome, Student 17	My Profile	Help	logout (T	rain-17)
	索	NORTH CAROLINA Agricultural and Technical State University				User Group: Department	Head/S	upervisor	>
	Home	Postings -	Hiring Proposals 🔻				Short	cuts 👻	
				Click on the drop down menu here.		Supervisor		▼ ¢	logout
d Po	osition	Management Sys	stem						

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

	Hire			Welcome, Studer	nt 17	My Profile	Help	logout	(Train-17)
	索	NORTH CAROLINA AGRICULTURAL AND TECHNICAL SYATE UNIVERSITY				User Group: Department	t Head/St	upervisor	
	Home	Postings 👻	Hiring Proposals -				Short	cuts 👻	
and	Positic	on Management Syst		Linc Butler, you have 0 messag ck on the Dean/Vice ancellor user type.	es.	Supervisor Applicant Re Chancellor Class and C Dean/Vice C Department Employee Human Reso Recruitment Supervisor	omp hancello Head ources	▼ C	logout
				Shortcuts					
				Create New SPA	Pos	ting			

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

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

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

NORTH C	APOLINA							ibox	People Ad	min	
A&T STAT	AROLINA E UNIVERSITY						Watch	List	APPLICANT	TRACKING	
		Home	Postings	Hiring Proposals	My Profile	Help					
							Linc Butler, you have 0 messages.	Depa	artment Head	• ¢	logout
N rc C by Position	Jnit: Huma Resources C	ab to view th any commer	ne reque nts subm w.				Take Action On Pendin	g Requ	est 🔻		
	Position Action Justification			dit" next to a nanges to.	ny sectio	n yoı	u want to				
	Justification of Need for New Position	Test Currently: blank									
	Pronosod Effective Date	08/01/2013									

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

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

System Basics - Using the Watch List

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

		Home Postings	Hiring Proposals My Profile Help	
come to your Online Recruitment and Position Man	agement System			
2				
Alerts (2 alerts from the administrator)				
· · · · · · · · · · · · · · · · · · ·				
Гуре Мессаде				
Check the module name at top right (Applicant Tracking or Position M	anagement) and change as needed to initiate a request or respond to cu	ment actions.		
Check your User Type just below header bar and change your role as	needed to initiate or respond to actions			
Information of the second s				
Inbox (30 Items need your attention)				
	Late (0)			
playing items for group "Department Head".				
oplaying liams for group "Department Head". Sing Requests (104) Special Handling	Туре	Current State	Owner	
gleying liens for group "Department Head". dog Reguests (104) – Special Handling	Type SPA	Department Head	Department Head	
aplaying lams for group "Department Head". ong Requests (104) – Special Handling	Туре			
(Inbox (30 litems need your stiention) age/ing litems for group "Department Head". ang Requests (104) Special Handling Watch List	Type SPA	Department Head	Department Head	
aplaying lame for group "Department Head". ong Requests (104) – Special Handling	Type SPA	Department Head	Department Head	
aplaying lame for group "Department Head". ong Requests (104) – Special Handling	Type SPA	Department Head	Department Head	
oplaying liams for group "Department Head". Sing Requests (104) Special Handling	Type SPA	Department Head	Department Head	
gleying liens for group "Department Head". dog Reguests (104) – Special Handling	Type SPA	Department Head	Department Head	
oliging lams for group "Department Head". Watch List	Type SPA	Department Head	Department Head	
oliging lams for group "Department Head". Watch List	Type SPA	Department Head	Department Head	
Watch List (19 Hemo)	Type SPA	Department Head	Department Head	
Watch List (19 Hemo)	Type SPA	Department Head	Department Head	
Watch List (28 lisms) Watch (28 lisms) Watch 2 Program (2) Watch 2 Program (2) Watch 2 Program (2) Program (2) Progr	Type BPA BPA	Department Head Department Head	Department Head Department Head	
bigiering liens for group "Department Head". Watch List Watch List (28 flame) Parange (b) Hondy Requests (32) big Highering Requests (32) big Highering Requests (32) big Highering Requests (32) big Highering Requests (33) b	Туре ВРА ВРА Туре	Department Head Department Head	Department Head Department Head	
playing lams for group "Department Head". Watch List Watch List (39 fisms) Pasting (0) Mining Proposals (0) Peeding Requests (23) do Title term Resources Specialist	Туре ВРА ВРА Туре ВРА	Department Head Department Head	Department Head Department Head State Owner Recrutment	
Watch List (19 Home) Watch Lis	Туре ВРА ВРА ВРА ВРА ВРА ВРА	Department Head Department Head Current State Closed BupenVaor	Department Head Department Head Itals Owner Recruitment Bugen lacr	
Watch List (18 Hems) Pating Repuests (10 Panding Repuests (22) Sob Title Human Resources Specialist Parchasing	Type BPA BPA Type BPA BPA BPA BPA BPA	Department Head Department Head Current State Closed Bupen/Sor Bupen/Sor Bupen/Sor	Department Head Department Head State Owner Recruitment Bupenisor Bupenisor	
Watch List (19 Home) Watch Lis	Туре ВРА ВРА ВРА ВРА ВРА ВРА	Department Head Department Head Current State Closed BupenVaor	Department Head Department Head Itals Owner Recruitment Bugen lacr	

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

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

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

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

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

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

he title to access the request.	Deguasta (22)		
e title to access the request.	Requests (33)		
Title	Туре	Current State	State Owner
an Resources Specialist	SPA	Closed	Recruitment
asing Specialist	SPA	Supervisor	Supervisor
osition - 2	EPA	Supervisor	Supervisor
g Services Manager	SPA	Supervisor	Supervisor
Resources Specialist	SPA	Human Resources	Recruitment

System Basics - Shortcuts and My Links

		Inbox PeopleAdmin Webh Litt APPLICANT TRACKING
Home Postings Hiring Proposals	My Profile Help	Lino Butler, you have 0 messages. Bupervisor 💌 C log
requests such as crea	contains links for initiating iting a new posting and g a position description.	Shortcuts Create New SPA Posting Create New PAR Posting Create New Post Doctoral Posting
The My Links menu c	ontains links to information aining tools, and the user	My Links Useful Links Training Videos (Go here for helpful videos for staff training on the use of PA7.) Your Applicant Portal
Current State	Owner	(How Applicants access your PeopleAdmin system) PeopleAdmin MCPAC - Customer Potal Login (best practice library, customer support portal, customer community)
Bupervisor Bupervisor	Supervisor Supervisor	

Section 2: Position Management

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

- Create New Position Description
- Modify Position Description

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

Create New Position Description - SHRA

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

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

					Inbox	People Admin	
Home	Postings	Hiring Proposals	My Profile	Click on Position Management.	Watch List	APPLICANT TRACKING POSITION MANAGEMENT	
				Linc Butler, you have 0	messages. Supe	ervisor 💌 C logo	out

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

Home Position Descriptions Clas	sifications My Profile Help	Inbox PeopleAdmin Watch List POSITION MANAGEMENT
	First select the appropriate user type: Supervisor, Department Head, <u>or</u> Dean /Vice Chancellor.	Supervisor C logout
ment and Position Management System	n	Then click on the Refresh button.

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

North Carolina A&T State University					(Inbox) Watch List	PeopleAdmin POSITION MANAGEMENT V
Hover cursor over Position	lome	Position Descriptions Class	sifications	My Profile	Help	
Descriptions tab and click		SPA SPA Pending Requests			Linc Butler, you have 0 messages. Sup	ervisor 💽 C logout
on SHRA.		EPA				
Welcome to your Online Recruitment a	nd Posi	EPA Pending Requests Post Doctoral	1			
		Post Doctoral Pending Requests			Shortcuts	12

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

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

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

4	NORTH CAROLINA A&T STATE UNIVERSITY		Home Position Desc	criptions Classifications My F	Puello Unia	(Inbox) Watch List	PeopleAdmin POSITION MANAGEMENT
	n Descriptions / SPA PA Position Description	ns			Active user type is Supervisor.		ervisor 💽 C lo
	Open Saved Search ¥ Sear	rch:	Search More	e search options	Searches are customizab	le by	
	t of position de tive user type.	• •	<u>fy an existing position</u> , select it from th	e list below by clicking on the worki	position attributes and c saved for later use.	an be	oyee name.
act	tive user type.	• •	und)	e list below by clicking on the work Previous $f(2)(3)(4)$ Next \rightarrow	•	an be	oyee name.
act	tive user type.		und)		•	an be status	
act	Saved Parch: "All Position	on Descriptions" (104 Items Fo	und)	Previous f 2 3 4 Next→	saved for later use.		Actions
act	Saved arch: "All Position Working Position Title	on Descriptions" (104 Items Fo Position Number	und) Employee First Name	Previous f 2 3 4 Next → Employee Last Name	saved for later use.	Status	Actions (Actions)
act	Saved Parch: "All Position Working Position Title Staffing Services Manager	Position Number 000016	und) Employee First Name Tammie	Previous 1 2 3 4 Next → Employee Last Name Hill	saved for later use.	Status Active	Actions (Actions) Actionsy
	Saved arch: "All Position Working Position Title Staffing Services Manager Administrative Support Spec Human Resources Specialist Human Resources Manager	On Descriptions" (104 Items Fo Position Number 000016 010000 000027	und) Employee First Name Tannie Beinda Etter Linc	Previous f 2 3 4 Next	Saved for later use. Supervisor Human Resources Manager (Linc Butler) Human Resources Manager (Linc Butler) Human Resources Specialist (Amy Braun)	Status Active Active Active Active	Actions (Actions) Actions v Actions v Actions v
act	Saved arch: "All Positio Saved arch: "All Positio Working Position Title Staffing Services Manager Administrative Support Spec Human Resources Specialist	Position Number Position Number 000018 010000	und) Employee First Name Tammie Belinda Ester	Previous f 2 3 4 Next→ Employee Last Name Hill Mackin Jones	Saved for later use.	Status Active Active Active	Actions (Actions) Actions y Actions y Actions y

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

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

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



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

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

SHRA Create New - Edit Pending Request Page - General Navigation

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

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

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

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

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

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

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

					Amy Braun, you have 0 messages.	Supervisor	- C log
nding Requests /	/ New Position Description /	New Position definition / S	ummary				
		Administrativa	Cupport		Tales Action On Deading	Demuset	
		: Administrative	Support		Take Action On Pending WORKFLOW ACTIONS	g Request 🔻	
Associa Current Stat	te (SPA) Edit	: Administrative	Support				
Associa	te (SPA) Edit us: Draft : SPA	Created by: Amy Braun Owner: Amy Braun			WORKFLOW ACTIONS	Pending	

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

5) Click "Submit"

Modify Position Description: Class & Comp Specialist (SPA) Edit Current Status: Draft Keep working on this Pending Request Postion Type: SPA Section/Unit: Classification & Compensation Created by: Amy Braun Owner: Amy Braun Created by: Amy Braun Owner: Amy Braun	visor 👻 logo	Amy Braun, you have 0 messages. Supervisor	Take Action			
Current Status: Draft Kee working on this Pending Reguest Position Type: SPA Created by: Amy Braun Canceled (more to Canceled) Section/Unit: Classification & Compensation Owner: Amy Braun Send to Department Head (more to Department Head)			Request	ption: Class & Comp		
Compensation Department Head)	a to	Request Canceled (move to Canceled)			Position Type: SPA	
Summary History Settings I Add this pending request to your watch		Department Head)			Compensation	
Add this pending request to your watch list?						

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

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

SHRA Create New - Position Action Justification Tab

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

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

SHRA Create New – Classification Tab

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

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

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

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

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

ending Requests / / New Position Desc		Position Descriptior	ns Classifications M	ly Profile Help	Navigate to the previous tab by clicking on the "< <prev" button.<="" th=""></prev">
Editing Pending Request	SPA Classification			_	Save << Prev Next >>
Position Action Justif					
SPA Classification	If you are not editing from an exist analyst in DHR can assist you in				fication (career band) titles by a key word. Your Class/Comp ching your business need
SPA Position Details		0		,	ication. Return from the summary using the Back arrow at top
Position Funding Infor					the title and select Next>> in the orange box at top or bottom
Add ADA Checklist Form	_				
Supplemental Documents					have opened a new window within the system and need to osition Descriptions tab and your request in progress.
 Supervisor 	Classifications - Filter these re	sults	Search all SHR	A class title	ns hv
lick the radio outton next to he SHRA class	Saved Search: "Class	ifications" (93 lt e	clicking on "Fil	ter these re	esults" Classifications
itle you want to	Position/Classification Title	Job Code	Classification Status	(Actions)	F
elect, then click	SPA Title - 1	23187	Approved	Actions	View an SHRA
<u> </u>	◎ Test New Class	Job Code	Approved	Actions	classification summary by
Sav <mark>e" an</mark> d	C Accountant	10751	Approved	Actions	
	Accounting Manager	10752	Approved	Actions	clicking on "Actions".

SHRA Create New – Position Details Tab

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

and then click the

tton to save changes and navigate to the next tab:

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

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

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

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

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

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

Competencies Performance	cies ired in the position to meet business needs. A specific gro re utilized in the development of a position description. najor job duties of the position related to at least three of the rogram and Organization, Customer Service, Communication – Verbal/Written, Information/Rec	he competencies required in the selected career
Competencies and Related Job Duties		
scroll back down to this section with each add must equal 100%	mpetencies and Related Job Duties Entry" button. Repeat for each com lition to enter a competency and add job duties. The total percentage of petency areas, the system will prevent submission of this request.	Click here to add competencies and related job duties - <u>3 entries are</u> <u>required.</u> 18

	ification						
		required in the position to meet business and are utilized in the development of a po		ompetencies has been ide	entified for each		
Using only those compe band.	tencies listed below, describe th	he major job duties of the position related	to at least three of the comp	petencies required in the	selected career		
Competencies	Applied Knowledge – HR Program and Or Performance	Organization, Customer Service, Communication – Vert	al/Written, Information/Records Admin	nistration, Program Administration	n, Managing Work and		
Competency Profile [link to OSP]	http://www.osp.state.nc.us/Guide/Com	npWebSite/Profiles/HR%20Specialist%20Profile.pr	I				
Competencies and Relate	ed Job Duties						
must equal 100%			total percentage of time allo				
must equal 100%		reas, the system will prevent submissi				the drop down l	ist <u>.</u>
must equal 100% Unless job duties are de	scribed in three competency ar	reas, the system will prevent submissi	on of this request.	Select comp	petency from	the drop down l	_
must equal 100% Unless job duties are de Competency Describe the specific job duties related to	scribed in three competency ar	reas, the system will prevent submissi	on of this request.	Select comp cribe specif	betency from	related to comp	etei
must equal 100% Unless job duties are de Competency Describe the specific job duties related to this competency	scribed in three competency ar	reas, the system will prevent submissi	on of this request.	Select comp cribe specif	betency from	•	eter

SHRA Create New – Position Details – Compliance and

Requirements Completing the final position details fields identifies all required and

preferred qualifications.



SHRA Create New - Position Funding Information Tab

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

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

1) FTVORGN- Provides a list of Org Codes

2) FTVFUND- Provides a list of Funds

3) FTVACCT- Provides a list of Accounts

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

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

	Home	Position Descriptions	Classifications	My Profile	Help			
					Linc Butler, you have 0 messag	es. Supervisor	▼ ¢	logout
Pending Requests / / New Position Desc	ription / / Edit							
Editing Pending Request	Descriptions, Exception	IMPORANT No				Save <> Pre	ev Next >>	
Position Action Justif	* Required Information		•			,		
SPA Classification	Funding Source Deta	ils						
SPA Position Details	Ū		n Click on "Add E	unding Source	Details Entry" to enter budg	et and other requi	red codes	
Position Funding Infor					d must equal the requested s		rea coaes.	
Add ADA Checklist Form	If the position has more	re than one funding so	urce, continue to s	elect "Add Fun	ding Source Details Entry" a	nd "Save" until all	sources ar	е
Supplemental Documents					below the last saved entry prmation. Continue to click as			
Supervisor	funding sources.	(s Entry to provide t	ne funding inte	innation. Continue to click a		ig multiple	
Pending Request Summary	Add Funding Source Det	ails Entry	the positio	on has mo ntinue to	unding source. If re than one fundi click here until all entered.	ng	ev Next >>	

State Appropriated Funding / Non-State Appropriated Funding	Please select	Select State or Non-State from drop down list.
If non-state, select source of funding:	Please select	If Non-State, select funding source from drop down list.
Additional funding source information	If "Other" selected above, designate source. Provid funds.	se position number if funds are being transferred from another position. Attach Budget Revision Form as Supplemental Document if necessary to transfer
Is this position partially or fully funded on ARRA stimulus monies?	V	Enter or Revise funding source information. If you are
Budget Code	Please select	not sure about fund/account/org numbers assigned to
- Fund	Format: 6 digit number #######	your department or the amount/type of funding available, refer to the Chart of Accounts or contact
Org	Format: 5 digit number ######	Budget and Planning. Submissions with incorrect
- Account	Format: 5 digit number #####	information here will be returned to you and cause delays in reviewing and approving your request.
Program	Format: 3 digit number ###	
Date Funds End		Enter date funds end (if time-
Annual Amount		
Percentage of FTE		limited), annual amount, and percentage of FTE.
Remove Entry?		
Add Funding Source Details Er	stry	

SHRA Create New - Add ADA Checklist Form Tab

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

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

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



SHRA Create New - Supplemental Documents Tab

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

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

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

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

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

					Linc Butler, you have 0 messages.	Supervisor	• ¢	
ding Requests / / New Position Desci	ription / / Edit							
Editing Pending Request	Supplemental Do	cuments				Save << Prev	Next >>	>.
Position Action Justif	Opposite time I Chart in I	Demined Desilian en				K Dudent Devision I		
SPA Classification	needed to support actio	n, download it from th	e Budget and Planr	ning Web Site (htt	urrent org chart is not attached. I p://www.ncat.edu/research/docur	ments/dored-		
SPA Position Details	documents/research-se	rvices-documents/bu	Iget-revise.xlsx), co	omplete it, save it,	and select "Upload New" as the	option under Action	ns.	
Position Funding Infor	Excel and Word docume	ents may be attached						
Add ADA Checklist Form	PDF conversion must be	e completed for the d	ocument to be valid	when applicable.				
Supplemental Documents	Document Type	Name Status (Actio	ns)					1
Supervisor	Organizational Chart	Action	ST		tions", then select	•		
Pending Request Summary	Budget Revision Form	Upload New Create New		Create N	ew, Choose Existing	g, or Add b	y	
	Other Document	Choose Existing		URL in or	der to upload an a	ttachment		
	Post Doctoral Evaluation	Add by URL			•			J
						Save << Prev	Next >>	>
				Complete t	his page by clicking			
			î	on Save an				-

SHRA Create New - Supervisor Tab

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

	Pending Requests / / New Position Desc		sition Description	s Classification	s My Profile	Navigate to the pre clicking on the "<<1		-	
	Editing Pending Request	Supervisor				Sav	e << Prev	Next >>	
	Position Action Justif	Position Descriptions -	-						
	SPA Classification	r osition bescriptions - i				ition descriptions by			
	SPA Position Details			clic	king on "Filt	er these results".	criptio	ns 🙁	
	Position Funding Infor	Saved Search: "	All Position De	scriptions" (104 It	ems Found)				
	Add ADA Checklist Form				is 1234	Next →			
	Supplemental Documents								
		Working Position Title	Position Number	Employee First Name	Employee Last Name	Supervisor	Status	(Actions)	
	he radio button	Staffing Services Manager	000016	Tammie	Hill	Human Resources Manager (Linc Butler)	Active	Actions v	
	o the position	C Administrative Support Spec	000018	Belinda	Macklin	Human Resources Manager (Linc Butler)	Active	Actions v	
	ption you want to , then click	Human Resources Specialist	010000	Ester	Jones	Human Resources Specialist (Amy Braun)	Active	Actions	
Next >		Human Resources Manager	000027	Linc	Butler		Active	Action 22	
rone >		Administrative Support Assoc	000037	Rozolene	Feimster	Business Officer (Jacob Teagle)	Active	Actionsv	

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

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

Editing Pending Request	Superviso	r		Save << Prev Next >>
Position Action Justif	The Supervise	or Tab allows you to select the positio	n to which your new position will report. If you are not ed	iting from an existing position, use "Filt
Classification		" to search all supervisors by a key we		ining from an existing position, use The
Position Details	To select a po	sition description to which your new po	sition will report and proceed with creating the position	description, click on the Radio Button
Position Funding Infor	the left of the p	osition description you want to select,	then and click on the orange "Next>>" button located o	
Add ADA Checklist Form	corners of the			
Supplemental Documenta	Selected Sup	ervisor		
Supervisor) í	Search Position Descriptions	×	
Employee	-	Search:		
Pending Request Summary	-	Postion Type: Add Column: EPA Post Doctoral Post Doctoral Department: First Name:	Select EHRA as Position Typ under "Filter These Results a different supervisor need to be assigned	s" if
	Position Des	Last Name:		
		•	•	Ad hoc Search

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

SHRA Create New - Pending Request Summary Tab

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

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

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

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

SPA Pos Contact Ir		o make edits to a tab.	
Orange Circle	Name		
Exclamation Po	t ne Number		
	ontact Email		
Proxy (r Leave Reporting)		
Pro	Phone Number		

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

North Carolina			Inbox	People Admin
A&T STATE UNIVERSITY			Watch List	POSITION MANAGEMENT V
	Home Position Descriptions	Classifications My Profile	Help	
			Linc Butler, you have 0 messages. Su	pervisor 🔽 C logout
Pending Requests / / New Position Description / New Position Description: Unna Description (SPA) Edit Current Status: Draft Position Type: SPA Section/Unit: Compensation, Benefits & Position Management Summary History Settings	Click on "Take Acti Request", then sel Department Head' request to the nex approval workflow	ect "Send to " to move the t step in the	Take Action On Pending Rev WORKFLOW ACTIONS Keep working on this Pend Request Canceled (move to Cancel Send to Department Head) Canceled (move to Cancel	ing ed) (move to
Position Action Justification Edit				

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



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

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

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

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

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

Create New Position Description - EHRA

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

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

					Inbox	People Admin	
 Home	Postings	Hiring Proposals	My Profile	Click on Position Management.	Watch List	APPLICANT TRACKING POSITION MANAGEMENT	
				Linc Butler, you have 0	messages. Supe	ervisor 💌 C log	gout

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

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

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

NORTH CAROLINA						Inbox	PeopleAdmin
NORTH CAROLINA A&T STATE UNIVERSITY						Watch List	POSITION MANAGEMENT V
		Home	Position Descriptions	Classifications	My Profile	Help	
		- 7	SPA			Linc Butler, you have 0 messages. Su	ipervisor 💌 🕏 logout
			SPA Pending Requests				
Hover cursor over P	osition		EPA				
Descriptions tab an	d click		EPA Pending Requests				
on EHRA.		d Posit	Post Doctoral)			
			Post Doctoral Pending Reque	sts			
		-				Charlende	

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

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

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

森	NORTH CAROLINA A&T STATE UNIVERSITY			(inbox) People/ Watch List Posmo	Admin N MANAGEMENT 🔻
		Home Posit	tion Descriptions Classifications My Profile	Help	
	Descriptions / EPA	ions		ive user type is ervisor.	C log
List	open Saved Search v so of position de ve user type.	earch: scriptions by To modify an existing p	Search More search options	Searches are customizable by position attributes and can be saved for later use.	er, or
	oc Sea	Position Descriptions 0 1 Descriptions" (6 Items Found)			Actions
	Working Position Title	Position Number	Department	Position/Classification Title	(Actions)
	EPA Position - 2	76767	Intercollegiste Athletics	Assoc Director of Athletics	Actions
	DHR EPA Position Test 1	12345	Student Affairs	Admissions Officer	Actionsv
	Director		Compensation, Benefits & Position Management	Director	
	Assistant VC for HR				Actions

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

					Watch		PeopleAdr POSITION M		NT V
Home	Position Descriptions	Classifications	My Profile	Help					
				Linc Butler	, you have 0 messages.	Superv	visor	• ¢	logout
		Click here to	initiate the r	equest.	Стеа	te New P	osition Des	cription	

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

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

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

North Carolina				Inbox	PeopleAdmin
A&T STATE UNIVERSITY				Watch List	POSITION MANAGEMENT
He	me Position Descriptions	Classifications My Profile +	lelp		
			Linc Butler, y	ou have 0 messages. Supe	ervisor 💌 C
sition Descriptions / EPA / New Position Description					
New Position Description	4. Once all data click Start Pendi	fields are filled in, ng Request.		Start Pending Request	Cancel
Working Position Title				iter the Worki position.	ng Title of
Department *					
Section/Unit * Clone an existing Position Description?		3. Select the Section/Unit to which the position		to which th	e department ne position is om the drop
one an existing resident beschption:		assigned from th drop down list.	e	<u> </u>	

EHRA Create New - Edit Pending Request Page - General Navigation

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

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

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



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

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

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



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

	Home Pos	ation Descriptions	Classifications	My Profile	e Help
					Amy Braun, you have 0 messages. Supervisor
nding					
		Take Action		×	
	Modify Position Description: Assistant Dire	Request	on this Pending	• •	
	Current Status: Draft	Comments (option	al)		
	Position Type: EPA Created by: Amy Braun Section/Unit: Director Athletics Owner: Amy Braun				
	Summary History Settings				
			ing request to your watch		
	O Position Action Justification Edit	list?		_	
			Submit Cance	1	
	Reason for Position				

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

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



EHRA Create New - Position Action Justification Tab

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

button to save changes and navigate to



EHRA Create New - Classification Tab

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

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

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

ending Requests / / New Position Des	cription / Senior Director for HR Commun	ications / Edit		•	ate to the previous tab by g on the Prev button.
Editing Pending Request	Classification				Save << Prev Next >>
Position Action Justif	Karan and a different and a	della e e ella e e e all'Ella e di e e e e e ella			a selection between to the Left of some left Title
Classification	and then SAVE to select it. The	Position/Classification title selected her	e may be a more general tit		he selection button to the left of any Job Title Vorking Title. After selecting and saving a
Position Details		eed by clicking the orange Next>> butto			
Position Funding Infor		hanging a job/classification title you oper eviewing the information. Closing this tab			ew window within the system and need to <u>close</u> b and your request in progress.
			/		
Add ADA Checklist Form	Classifications - Filter these r	results			
 EPA Designation Reques 	Classifications - Filter these r	Search a	ll EHRA class t	itles by	
	Classifications - Filter these r	Search a	ll EHRA class t on "Filter these	•	Classifications
EPA Designation Reques	Classifications - Filter these r Saved Search: "Class	sifications" (288 I		e results"	
 EPA Designation Reques Supplemental Documenta k the radio ton next to the 		sifications" (288 I	on "Filter these	e results"	
 EPA Designation Reques Supplemental Documenta Supplemental to cumenta Supplementation reaction reaction	Saved Search: "Clas	sifications" (288 ← Previous 1 2	on "Filter these	e results" 9 10 Next→	
 EPA Designation Reques Supplemental Documenta k the radio ton next to the 	 Saved Search: "Class Position/Classification Test EPA Class EPA Title-1 	sifications" (288 ← Previous 1 2 Job Code EPA Position Type Test Tier I 244641 Tier I	3 4 5 6 7 8 EPA E-class Test test	9 10 Next → (Actions) Actionsv Actionsv	View an EHRA
 EPA Designation Reques Supplemental Documenta Supplemental to cumenta Supplementation reaction reaction	 Saved Search: "Class Position/Classification Test EPA Class EPA Title-1 New Title 	sifications" (288 I Previous 1 2 Job Code EPA Position Type Test Tier I 244641 Tier I 0 TBD	3 4 5 6 7 8 EPA E-class Test test TBD	9 10 Next → (Actions) Actionsv Actionsv Actionsv	View an EHRA classification summary
 EPA Designation Reques Supplemental Documenta Supplemental to cumenta Supplemental to the radio Supp	 Saved Search: "Class Position/Classification Test EPA Class EPA Title-1 	sifications" (288 ← Previous 1 2 Job Code EPA Position Type Test Tier I 244641 Tier I	3 4 5 6 7 8 EPA E-class Test test	9 10 Next → (Actions) Actionsv Actionsv	View an EHRA

EHRA Create New - Position Details Tab

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

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



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

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

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

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

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

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

	Duties Entry" button. Repe	ibilities and duties using the three categories of Instructional, Research, and Administrative. To enter duties please click the "Add Primary Responsibilities and t for each category relevant to job functions. Completion of at least one entry is required. You will need to scroll back down to this section with each gory and add job duties. The total percentage of time allocated for all categories should equal 100%.
	Supervisory	Click here to add the major
	Does this position supervise?	Please select This field is required. HELP TEXT: Supervisory positions conduct interviews, make final hiring decisions, provide salary recommendations, m supervision, develop work plans and conduct performance appraisals for PERMANENT employees. If this position performance appraisals for
	Number of Permanent Employees this Position Supervises Percent of Time Spent	
Clicking	Add Primary Respor	sibilities and Duties Entry opens this section to enable entry of duties:
Desc		es s and duties using the three categories of Instructional, Research, and Administrative. To enter duties please click the "Add Primary Responsibilities and sch estearching relevant to job functions. Completion of it least are entry in complete Variable Add to excel back down to this perform with each

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

EHRA Create New – Position Details – Compliance and Requirements

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

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

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

EHRA Create New - Position Funding Information Tab

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

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

1) FTVORGN- Provides a list of Org Codes

2) FTVFUND- Provides a list of Funds

3) FTVACCT- Provides a list of Accounts

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

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

	Line Butler, you have 0 messages. Supervisor	
Editing Pending Request		Prev Next >>
Position Action Justif	* Required Information after each funding source is entered.	
Classification	Funding Source Details	
Position 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 e	ach entry.
Position Funding Infor	Please note that the annual amount budgeted must equal the requested salary.	· · · ·
Add ADA Checklist Form	If the position has more than one funding source, continue to select "Add Funding Source Details Entry" and "Save" until all sources are entered. Each time	vou add an
EPA Designation Reques	additional entry, you will need to scroll down below the last saved entry to enter a new funding source	
Supplemental Documenta	Add Funding Source Details Entry Click here to add a funding source. If	Prev Next >>
Supervisor		Next >>
Pending Request Summary	the position has more than one funding	
	source, continue to click here until all	
	funding sources are entered.	



EHRA Create New - Add ADA Checklist Form Tab

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

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

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

ADA Compliance Informati	n	
The physical activity of this position (Check all that apply and at least one)	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. Crouching: Bending legs at knee to come to a rest on knee or knees. Crouching: Bending hand(s) and arm(s) in any direction. Standing: Particularly for sustained periods of time. Walking: Moving about on foot to accomplish tasks, particularly for long distances or moving from one work site to another. Ulting: Using upper extremities to press against something with steady force in order to thrust forward, downward or outward. Ulting: Raising objects from a lower to a higher position or moving objects horizontally from position-to-position. This factor is important if a toccurs to a considerable degree and requires the substantial use of the upper extremities to the accomplish tasks, primarily with fingers rather than with the whole hand or arm as inhanding. Crasping: Picking, pinching, typing or otherwise working, primarily with fingers rather than with the whole hand or arm as inhanding. Crasping: Preceiving attributes of objects, such as size, shape, temperature or texture by touching with skin, particularly for a finger tips. Crasping: Preceiving attributes of objects, such as size, shape, temperature or texture by touching with skin, particularly fact finger tips. Crasping: Preceiving thindus of object shorizontally position to roceive detailed or important if beody and and and the discrimination in sound. Crasping:	Check all that apply and at least one in this section.
The physical requirements of this position (Select One)	Please select This field is required. Select one from the drop down list.	35



EHRA Create New – EHRA Designation Request Form Tab

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

	Home Position Descriptions Classifications My Profile Help			
	Linc Butler, you have 0 messages. Sup	pervisor 💌 C logou		
ding Requests / / New Position Descr	iption / Senior Director for HR Communications / Edit			
Editing Pending Request	EPA Designation Request Form	ve <> Prev Next >>		
Position Action Justif				
 Classification 	Check spelling			
Position Details	Complete the EPA Designation Request Form when creating a new non-faculty position for review by Classification and Compensation to determine compliance with N.C.G.S. 126, 116 and UNC Policy 300.1.1. Please note the specific organizational chart requirements below. For			
Position Funding Infor	more information about EPA non-faculty definitions, see http://www.northcarolina.edu/hr/hrab/HRAB_Submission_Proces	ss_2-2013.pdf		
Add ADA Checklist Form	This form is only necessary on a position modification if the change in responsibilities would place the position in a different	ent EPA category.		
EPA Designation Reques	Request Details			
Supplemental Documenta	Institution Enter University information.			
Supervisor				
Pending Request Summary	Division/School/College			
	Department			
	EPA Designation Requested Please select Select EHRA	requested designation		
	Proposed Position Information from the	e drop down		
Proposed Position Informat	lion		Complete all fields.	
---	--	--------------------------	--	------------------------------------
Proposed Title		l		
Proposed Working Title (if different)				
Proposed Position Number				
Proposed JCAT Code			Select current positio from the drop down l	
Current Status	Please select		from the drop down i	151.
Current Position Information	n (If Applicable)		Complete all fields.]
Current Title				
Name of Employee in Position				
Name and Title of Supervisor				
Institutional Authorization (I	HR Use Only)		This section will be co	mpleted by HR.
specific reference to releval	es will electronically submit completed for t elements in SAAO definition or Instruct bers, position designations (SPA, EPA, S	ional/Research definitio	nsA detailed position descriptionAn	organizational chart that includes
Title				
Electronic Signature of HR Analyst via Email Submission				
				Save << Prev Next >>

EHRA Create New - Supplemental Documentation Tab

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

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

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

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

		Home Po	osition Descriptions	Classifications	My Profile	Нер		-
						Linc Butler, you have 0 messages.	Supervisor	▼ ¢ lo
nding	Requests / / New Position Descri	iption / Senior Director for HR C	communications / Edit					
Ed	liting Pending Request	Supplemental Doc	umentation				Save << Prev	Next >>
F	Position Action Justif	Organizational Chart is D	Dequired Desition requi	at will be returned	I to Initiator if a c	urrent org chart is not attached. I	f Dudget Devision E	arm ia
o	Classification	needed to support action	, download it from the E	udget and Planni	ng Web Site (htt	p://www.ncat.edu/research/docur	ments/dored-	
F	Position Details		-	t-revise.xlsx), cor	nplete it, save it,	and select "Upload New" as the	option under Actions	5.
F	Position Funding Infor	Excel and Word docume						
1	Add ADA Checklist Form	PDF conversion must be	completed for the docu	ment to be valid v	when applicable.			
🕑 E	EPA Designation Reques	Document Type N	ame Status (Actions		ick "Actio	ns", then select Up		
5	Supplemental Documenta	Organizational Chart	Actions			•		
 S 	Supervisor	Budget Revision Form	Upload New Create New	Cr	eate New	, Choose Existing,	or Add by	
F	Pending Request Summary	Other Document Post Doctoral Evaluation	Choose Existing Add by URL			er to upload an atta	-	

EHRA Create New - Supervisor Tab

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

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

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

Pending Requests / / New Position Des		Position Descriptions	Classifications My Profile F	Navigate to the previou clicking on the "< <prev< th=""><th>-</th></prev<>	-
Editing Pending Request	Supervisor			Save <	Prev Next >>
Position Action Justif	Position Descriptions	Eilter these results			
 Classification 	Position Descriptions	- Filter these results	Search all posit	ion descriptions by	
Position Details	_		clicking on "Filt	er these results".	ns 🛛 🔊
Click the radio button next to the	 Saved Search Working Position Title 	: "Position Descriptio Position Number	ns" (6 Items Found) Department	Position/Classification Title	(Actions)
osition	EPA Position - 2	76767			Actions
	O DHR EPA Position Test	1 12345	View the position	descriptions	Actions
lescription you	Director		summary by clicki	ng on "Actions",	Actions
vant to select,	Assistant VC for HR			clicking on the title.	Actions
hen click	O AVC for Student Affairs	22233	then view of by	cheang on the title.	Actions
'Next>>".	C Assistant Vice Chancell Development	or for 44444	Compensation, Benefits & F Management	Position Asst Vice Chanc Stu Dev	Actions

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:

9	Position Det		Click "Edit" to make edits to a tab.	
	e Circle tion Point	ation ct Name		
		Phone Number		
		Leave Reporting)		
	Proxy F	Phone Number		

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

NORTH CAROLINA A&T STATE UNIVERSITY		(Inbox) PeopleAdmin
A ART STATE UNIVERSITY		Watch List POSITION MANAGEMENT
	Home Position Descriptions Classifications My Profile	e Heip
		Linc Butler, you have 0 messages. Supervisor
Pending Requests / / New Position Description / New Posit	tion definition / Summary	
New Position Description: Senio Communications (EPA) Edit Current Status: Draft	Click on "Take Action On Pending Request", then select "Send to Department Head" to move the	Take Action On Pending Request workFLOW ACTIONS Keep working on this Pending Request

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



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

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

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

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

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

Create New Position Description – Post Doctoral

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

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

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

Home Postings Hiring Proposals My Profil Linc Butler, you have 0 messages. Supervisor dogut						Inbox	People Admin	
						Watch List		
	Home	Postings	Hiring Proposals	My Profil	-	messages Supe		ut

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

			Inbox Watch List	PeopleAdmin Position Management V
Home	Position Descriptions	Classifications My Profile Help		
		First select the appropriate user type: Supervisor, Department	ages. Supe	rvisor 🔽 C logout
		Head, <u>or</u> Dean /Vice Chancellor.	Then click o	n the Refresh
ment and Posi	tion Management S	ystem	button.	

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

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

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

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

NORTH CAROLINA A&T STATE UNIVERSITY							(In Watch		PeopleAdmin
	Home	Position Descriptions	Classifications	My Profile	Help				
ition Descriptions / Post Doctoral				Active Super	user ty visor.	vpe is		Supervi	50r 💌
Post Doctoral Position D	Descriptions						Creat	ite New Po	sition Description
Open Saved Search + Sear t of position descr		Ser	And the search of the search o		p	osition	s are cust attribute r later us	es an	-
t of position descr tive user type.					p	osition	attribute	es an	-
t of position descr tive user type.	Position Descriptions		ect it from the list bel		^{n the w} Sa	osition	attribute r later us	es an	d can be

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:

					(In Watch	box	PeopleAd		VI ▼
Home	Position Descriptions	Classifications	My Profile	Help		LIOT			
				Linc Butler,	you have 0 messages.	Supe	ervisor	▼ ¢	logout
		Click here to	o initiate the r	equest.	Creat	te New	Position Des	cription	
		Search	Hide search options						

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



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

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

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

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

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

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

Tab list		Home Position Descriptions Classifications	E My Photos Holp Line Buller, Ide Hank Cimesages, Supervisor	💌 đ apost
Party sequences and the second law	oripition / Research Associate / Edit		Long series, just care a contrague. (experiment	
Editing Puting Request	Position Action Justi	ication	Save and Next buttons.	na Net 22
Position Action Justif	Theck spelling			
Position Details	Prior to establishing and hirin	g for a Postdoctoral Associate position, Principal Investigators (PI) should review the Por	stdoctoral Scholars Policy. Approval for program participation and proposed postdoc positions must be granted by approved, DORED will assign a position number.	the Vice
Position Funding Infor Add ADA Checklist Form	To stop a	nd return to request later,	ed, must reflect a budgeted available amount to be identified with a funding source and is subject to DHR and	budget review
Supplemental Documenta	click Star	t Pending Request.		
Supervisor				
Pending Request Summary	Justification of Need for New Position	n The fait is remarked	Required fields	
Blue Check	Proposed Effective Date	This field is required.	highlighted in RED.	
Circle	Basis for EPA Status	î		
	Enter Research or Instructional			
	DORED Position Number			
	Requested Salary	Cilck on this link to review an NIH reference on Postolocioral Salary Guidelines: http://www.noat.edu/	hribcumerta/posi-docitalary, guidelines doc	
	Position Request Number		Save and Next buttons.	ave Next PP

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

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

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



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

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

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

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

enailig i	Requests / _ / New Position Descriptor	NEC NEW YOR	then believed a remember
	New Position Description Doctoral) Edit Current Status: Draft	on: Rese	earch Associate (Post Click on "Edit" to continue work on a "Create New
	Position Type: Post Doctoral Section/Unit: Civil Architect and Environ Engineer	Creat	Position Description" request already started and saved.

Post Doctoral Create New - Position Action Justification Tab

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

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

Editing Pending Request	Position Action Justification	Save Next >>
Position Action Justif	Theck spelling 💌	
Classification		
Position Details	Prior to establishing and hiring for a Postdoctoral Associate position, Principal Investigators (PI) should review the Postdoctoral Scholars Policy. Approval for program particip 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	
Position Funding Infor	The proposed effective date must be a future date, subject to change based on date of hire. The requested salary, if entered, must reflect a budgeted available amount to be	identified with a funding source and is
Add ADA Checklist Form	subject to DHR and budget review and approval.	
Supplemental Documenta	* Required Information	
Supervisor	Position Action Justification	
Pending Request Summary Funding to	Justification of Need for New Position This field is required. Must be a future date	
support the request must	Basis for EPA Status Enter Research or Instructional Provide the basis for EHI describing the position role	-
be secured	DORED Position Instructional	•
PRIOR TO initiation of the request.	Requested Salary Click on this link to review an NIH reference on Postdoctoral Salary Guidelines: http://www.ncat.edu/hv/documents/post-doc/salary_guidelines.doc Position Request Number	Link to NIH reference on Postdoctoral
		Salary

Post Doctoral Create New - Classification Tab

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

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

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

Guidelines.

Pending Requests / / New Position Des		lescriptions Cla	assifications My	1	avigate to the previous tab by cking on the "< <prev" button<="" th=""></prev">
Editing Pending Request	Classification				Save <pre> Next >></pre>
Position Action Justif	Select Post Doctoral Research A	ssociate or Post Do	ctoral Teaching Assoc	iate by clicking the	selection button and then SAVE to select it. Then
Classification	select Next>>	SSUCIALE OF FUSE DU	Corar reaching Assoc	nate by clicking the	Selection button and then SAVE to select it. Then
Position Details					ton will open a new tab. If you open the
Position Funding Infor	Classifications tab, you will nee	d to close it to retur	n to the Position Des	criptions tab and yo	our request in progress.
Add ADA Checklist Form	Classifications - Filter these re	sults			
Supplemental Documenta	-				Post Doc Classifications
lick the radio utton next to the	Saved Search: "Post I Position/Classification Title	Job Code	EPA E-class	(Actions)	
ick the radio utton next to the	_			(Actions)	View a Post Doc
ick the radio utton next to the ost Doc class title	Position/Classification Title	Job Code	EPA E-class	· · · · ·	View a Post Doc
ick the radio	Position/Classification Title	Job Code 81069	EPA E-class EN	Actions	View a Post Doc classification summary by clicking on "Actions".

Post Doctoral Create New – Position Details Tab

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

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



Post Doctoral Create New – Position Details Tab – Primary Responsibilities

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

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

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

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

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

Primary Responsibilities and Duties	
Describe the major responsibilities and duties using the three categories of Instructional, Research, a please click the "Add Primary Responsibilities and Duties Entry" button. Repeat for each category rele	
after each category is added. At least one entry is required to complete a If the position requires duties in more than a single category, you will need the sample Pos	t Doc position description.
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://w doc/pd_job_description_template.doc. You may copy and paste wording from this template into the "F Entry."	
Add Primary Responsibilities and Duties Entry Click to add the major responsibilities an	d duties - <u>1 entr∳7s required.</u>

Primary Responsibilities and Duties	
	hree categories of Instructional, Research, and Administrative. To enter duties Entry" button. Repeat for each category relevant to job functions and SAVE ired to complete a position description request.
If the position requires duties in more than a single categ and job duties. The total percentage of time allocated for	ory, you will need to scroll back down to this section to add another category all categories should equal 100%
	vailable for your reference at this link: http://www.ncat.edu/hr/documents/post- d paste wording from this template into the "Primary Responsibilities and Duties
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 Remove Entry? Add Primary Responsibilities and Duties Entry	Indicate percentage of time spent performing tasks and responsibilities described.

Post Doctoral Create New – Position Details – Compliance and Requirements

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



Post Doctoral Create New - Position Funding Information Tab

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

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

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

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

		Home	Position Descriptions	Classifications My P	rofile Help		
					Linc Butler, you have 0 mes	sages. Supervisor	▼ C lo
nding Requests / / Nev	v Position Descri	ption / Research Associa	ite / Edit				
Editing Pending Re	equest	Position Fun		DTE: Remember t		Save <> Prev	Next >>
Position Action Ju	stif	* Required Informatic	after each fun	ding source is ent	ered.		
Classification		Funding Source I	Details				
Position Details				on. Click on "Add Eunding S	ource Details Entry" to enter bu	idget and other require	d codes
Position Funding	g Infor				dgeted must equal the requeste		
Add ADA Checklis	st Form				ld Funding Source Details Entry		
Supplemental Doc	cumenta	entered. Each time source.	e you add an additional e	ntry, you will need to scroll	down below the last saved en	try to enter a new fun	ding
 Supervisor 		Add Funding Source	Details Entry	Click here to ad	d a funding source.	lf	
Pending Request	Summary			•	s more than one fur e to click here until s are entered.	U	Next >>
State Appropriated Funding / Non-State	Please select		Select	State or Non-Stat	e from drop down l	ist.	
Appropriated Funding	L		Belett			1501	_
If non-state, select source of funding:	Please select		If Non-	State, select fund	ing source from dro	on down list.	
Additional funding				•	•	•	
source information	If "Other" selecte funds.	ed above, designate source.	Provide position number if funds	are being transferred from another po	sition. Attach Budget Revision Form as Su	pplemental Document if nece	ssary to transfei
Is this position partially or fully funded on ARRA stimulus monies?							
Budget Code	Please select						
Fund							
	Format: 6 digit n	umber ########					
Org	Format: 5 digit n	umber ######		rdinate with DOR	-		
			func	ling source inforn	hation.		
Account	Format: 5 digit n	umber ######					
Program						_	
r rogram	Format: 3 digit n	umber ###		Enter date fund	s end (if time-	1	
Date Funds End				limited), annua		1	
Annual Amount				percentage of F	-	1	
Percentage of FTE				percentage of r	16.		
Remove Entry?				Complete this -	ago by clicking on	7	
dd Funding Source Details Er	ntry			Complete this p	age by clicking on	Save	<< Prev Ne

Post Doctoral Create New - Add ADA Checklist Form Tab

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

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

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



Post Doctoral Create New - Supplemental Documentation Tab

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

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

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

	·				
Editing Pending Request	Supplemental Do	ocumentati	on	Save	<pre></pre>
Position Action Justif	Organizational Chart in	Poquirod Por	ition request	will be returned to Initiator if a current org chart is not attached. If Budge	t Povision Form is
Classification	needed to support actio	on, download it	from the Bu	get and Planning Web Site (http://www.ncat.edu/research/documents/de	ored-
Position Details			0	evise.xlsx), complete it, save it, and select "Upload New" as the option of	under Actions
Position Funding Infor	PDF conversion must b	e completed for	or the docum	ent to be valid when applicable.	
Add ADA Checklist Form	Document Type	Name Status	(Actions)		
Supplemental Documenta	Organizational Chart		Actions	Click "Actions", then select Uplo	ad New.
 Supervisor 	Budget Revision Form Other Document	Upload Ne Create Ne		Create New, Choose Existing, or	-
Pending Request Summary	Post Doctoral Evaluation	Choose Ex Add by UF		URL in order to upload an attach	
		Add by OF			intent.

Post Doctoral Create New - Supervisor Tab

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

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

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

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

Post Doctoral Create New - Pending Request Summary Tab

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

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

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

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

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

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

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

	Take Action	×			
	Send to Department Head (mo Department Head)		are or	otional and can be	1
	Comments (optional)		he ne	xt level approver	
	Add this pending request to your list?	watch		List allows y	action to your Watch ou to easily track and action's progress.
1 has	Submit	Cancel			

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

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

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



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

Modify Position Description – SHRA

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

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

				Click on Position Management.	Inbox Watch List	PeopleAdmin APPLICANT TRACKING POSITION MANAGEMENT	
Home	Postings	Hiring Proposals	My Pr	rofile Help			
				Linc Butler, you hav	e 0 messages. Sup	ervisor 💌 C Io	ogout

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

		Inbox Watch List	PeopleAdmin POSITION MANAGEMENT
Home Position Descript	First select the appropriate user type: Supervisor, Department Head, or Dean /Vice Chancellor.	r, , Supe	rvisor 💽 C logou
ment and Position Managem		Then click on th button.	e Refresh

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

NORTH CAROLINA					(n	box	PeopleAdmin	
ART STATE UNIVERSITY					Watch	List	POSITION MANAGEMEN	л т
Home	Position Descriptions Clas	sifications	My Profile	Help				
	SPA			Linc Butler, ye	ou have 0 messages.	Supe	rvisor 💌 C	logout
	SPA Pending Requests							-
	EPA							_
	EPA Pending Requests							
Welcome to your Online Recruitment and Posit	Post Doctoral	•						
	Post Doctoral Pending Requests							
					Shortcuts			

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

Active User Type	Positions in Position Descriptions List
Supervisor	Positions that are direct reports to the Supervisor only.
Department Head/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.

46	NUETH CAROLINA ALT STOTE UNIVERSITY		Home Position Des	criptions Classifications h	by Develop a Markey	Watch Lite	PeopleAdmin Position MANAG
	Descriptions / SPA	ns			Active user type is Supervisor.		ervsor 💽
	Open Saved Search v Sear	ede:	Search Mor	e search options	Searches are customizab	ole by	
	t of position d ive user type.	escriptions by	l <u>y an existing position</u> , select it from th	e list below by clicking on the worki	position attributes and c saved for later use.		oyee name.
t	ive user type.		Nund)	e list below by clicking on the works Previous 1 (2) (3) (4) Next	saved for later use.		
ct	ive user type.		Nund)		saved for later use.		oyee name. Action
ct.	Saved of the "All Position	on Descriptions" (104 Items Fo	und) P	Previous 1 2 3 4 Next-	saved for later use.	can be	Acto
ct	Saved Tric: "All Position Working Position Title	on Descriptions" (194 items Fo Position Number	und) Employee Fest Name	Previous 1 2 3 4 Next Employee Lest Name	saved for later use.	can be	Actio
ct	Verlag Poston Ste Starting Sevices Manager	Pesition Number 000016		Previous (2)34 Next	Saved for later use.	can be	Action (Action Action
	Version Tale Narring Festion Tale Earling Services Manager Administrative Support Spec	Position Number 000016	vurid) Employee Frast Name Tamma Belinda	Previous (2) (3) (4) Next == Employee Last Kane Hastin	Supervisor Human Resources Manager (Jint Buller) Human Resources Manager (Jint Buller)	Status Active Active	Action (Action Action Action Action
	Versing Position Tale Staffing Services Manager Admentatives Engent Speci Human Resources Specialit	Pusition Number Pusition Number 000016 000000	und) —— f Employee Fint Name Tamme Beinda Einar	Previous (2) (3) (4) Next Employee Last Name Hit Mactin Jones	Supervisor Human Resources Manager (Jint Buller) Human Resources Manager (Jint Buller)	Sature Active Active Active	Actio (Actio Actio Actio Actio
	Verking Pestion Title Saved Perch: "All Position Verking Pestion Title Sating Services Manager Admenantesives Support Spec Human Resources Shanager	Positions" (104 Items Fo Position Number 200016 200000 000000 200000 200000	sund) == 0 Employee First Name Tarmia Beinda Exam Line	Previous 7 2 3 4 Next Employee Last Name Hit Maadin Johns Butler	Saved for later use.	Can be	Acto (Acto Acto Acto Acto Acto Acto

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

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

Ad hoc Search	All Position Descript	ions 🛛 🔊				
Saved Search: "All Post	sition Descriptions" (5 Items Found)				Actions
Working Position Title	Position Number	Employee First Name	Employee Last Name	Supervisor	Status	(Actions)
Human Resources Specialist	010000	SPA	User1	Human Resources Specialist (Amy Braun)	Active	Actions
Administrative Support Spec	000045	Shelby	Clark-Fuller	Human Resources Specialist (Amy Braun)	Active	Actions
Human Resources Specialist	000046	Amy	Braun	Human Resources Manager (Linc Butler)	Active	Actions
	004444			Human Resources Specialist (Amy Braun)	Activo	Actions
Position Management Assistant	001111			Fiuman Resources Specialist (Amy Draun)	/ Cuvo	/1000113 *

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

NORTH CAROLINA A&T STATE UNIVERSI	ТҮ						(Inbox) Watch List	PeopleAdmin POSITION MANAGEMENT
		Home	osition Descriptions	Classifications	My Profile Help			
					Amy Braun, you have 0) messages.	Supervisor	- C logo
sition Descriptions / SPA / I	luman Resources Specialis	t						
(SPA) Current Status: Ac							nt Preview (Employee)	View)
(SPA)	tive Cr	n Resources S				🚔 Prin	nt Preview (Employee nt Preview w Supervisor dify Position Description	

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

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



SHRA Modify - Edit Pending Request Page - General Navigation

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

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

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

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



SHRA Modify - Saving to Return to a Pending Request Later

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

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

NORTH CAROLINA ART STATE UNIVERSITY			Inbox PeopleAdmin Watch List Position MANAGEMENT •
	Home Position Descriptions	Classifications My Profile	Help
			Amy Braun, you have 0 messages. Supervisor 🔹 🖒 logout
Modify Position Description / C Modify Position Description Specialist (SPA) Edit Current Status: Draft	n: Class & Comp		Take Action On Pending Request WORK-LOW ACTIONS Keep working on this Pending Request
	Created by: Amy Braun Owner: Amy Braun		Canceled (move to Canceled) Send to Department Head (move to Department Head) Canceled (move to Canceled)
Summary History Settings			

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

Request Take Action On Pending Request -
Comments (optional) WORKFLOW ACTIONS
Keep working on this Pending Request
Canceled (move to Canceled)
Send to Department Head (move to Department Head)
Canceled (move to Canceled)
Add this pending request to your watch
list?

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

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

Modify Position Description: Class & Comp

Edit

Specialist (SPA) Current Status: Draft

Position Type: SPA Section/Unit: Classification & Compensation Click on "Edit" to continue work on a "Modify Position Description" request already started and saved.

Created by: Amy Braun Owner: Amy Braun

SHRA Modify - Position Action Justification Tab

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

	Home Pos	sition Descriptions	Classifications	My Profile	Help		
					Amy Braun, you have 0 messages.	Supervisor	🕶 Ċ logou
ing Requests / / Modify Position Des	cription / Class & Comp Specialist	t / Edit					
Editing Pending Request	Position Action Jus	stification				Save	Next >>
Position Action Justif							
SPA Classification	Check spelling				1. Select the re	ason(s) i	for the
SPA Position Details	* Required Information				modification re	auest.	
Position Funding Infor	Position Action Justificat	tion				questi	
Add ADA Checklist Form					y increase is requested, explain		
Supplemental Documenta					to change for payroll entry. The and is subject to DHR and budg		
Supervisor	available.						
Employee			Details for Posting				
Pending Request Summary			ion Review for Career Ba petency Level Review C				
	Reason for Position Modification	Career Progre FTE Change Funding Sour Change Repo	ession Increase Review rce Change rting Relationship (Sup	Ū	tion)		red fields ghted in RE

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

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

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

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



SHRA Modify - Classification Tab

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

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

ling Requests / / Modify Position Des	scription / Class & Comp Specialist / Edit	clicking on the "< <prev" button.<="" th=""></prev">
Editing Pending Request	SPA Classification	Save <pre> Next >></pre>
Position Action Justif		
SPA Classification	If you are <u>not</u> requesting a different career band, click on Next>> in the orang	je box.
SPA Position Details	If you are requesting a different classification (career band), scroll down bel search all position/classification (career band) titles by a key word. Your Clas	
Position Funding Infor	related competencies most closely matching the revised business needs be	
Add ADA Checklist Form	To view a different classification summary, Click on the arrow by "Actions" to	the right of any title and select View Classification. Return from the
Supplemental Documenta	summary using the Back arrow at top left. To select a different proposed cla- the left of the title and select Next>> in the orange box at top or bottom of sci	
Supervisor		
Employee	If in the process of viewing or changing a job/classification title you open the and need to close the Classifications tab after reviewing the information.	Classifications tab, you have opened a new window within the system
Pending Request Summary	request in progress.	mmarizes the current classification's
Scroll Down below the Selected SHRA Classification Detai	Selected Classification Details SPA Classification Details SPA Classification Information	Work, Competencies, Salary reference level, and Minimum Requirements.
Classification Deta	Position/Classification Title Human Resources Specialist	

located in the orange box at the top

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

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

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



SHRA Modify - Position Details Tab

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

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

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

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

SHRA Modify – Position Details Tab – Competencies and Related Job

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

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

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

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

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

SHRA Modify – Position Details – Compliance and Requirements

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



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

SHRA Modify - Position Funding Information Tab

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

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

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

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

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





SHRA Modify - Add ADA Checklist Form Tab

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

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

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

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





SHRA Modify - Supplemental Documents Tab

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

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

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

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

ng Peoplesita / _ / Modify Provision Description / Adm	mental and bibliou worker					
Editing Pending Request	Supplemental Doc	uments			Sam (Next >>
Position Action Justif	Orange and Chart of D	an ined Basilion servers u	ill he can includ in 1	nitiator if a current org chart is not attached	Without Desiring T	and in
SPA Classification	needed to support action.	download it from the Budg	et and Planning V	leb Site (http://www.ncat.edu/research/doc	uments/dored	
SPA Position Details	documents/research-serv	ices-documents/budget-rev	rise xisx), complet	le it, save it, and select "Upload New" as It	ve option under Action	5
Position Funding Infor	Excel and Word document	its may be attached.				
Add ADA Checklist Form	PDF conversion must be	completed for the documen	it to be valid when	applicable.		
Supplemental Documents	Document Type Na	me Status (Actions)				
Supervisor	Organizational Chart	AcSonte		ck "Actions", then selec		
Pending Request Summary	Budget Revision Form Other Document Post Doctoral Evaluation	Upload New Create New Chosee Exhibing Add by URL		eate New, Choose Existi &L in order to upload an		

SHRA Modify - Supervisor Tab

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

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

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

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



SHRA Modify - Pending Request Summary Tab

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

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

	Home Position Descriptions	Classifications	My Profile Help		
			Linc Butler, you have	0 messages. Supervisor	💌 C logout
Pending Requests / / Modify Position Description /	Administrative Support Assoc / Summary				
Modify Position Description Assoc (SPA) Edit Current Status: Draft	on: Administrative Support		Take Actio	n On Pending Request v	
Position Type: SPA Section/Unit: Classification & Compensation	Created by: Amy Braun Owner: Amy Braun				
Summary History Settings					
Position Action Justification Position Action Justification	Click "Edi	t" to make (edits to a tab.		
i for New	Additional workload in the area of classification necessitated the creation of an additional post				
Blue Circle Check	Currently: blank				
e Date	08/01/2013				
	Currently: blank				
Requested Salary	\$55,000				

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

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

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

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

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



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

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

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

${f \widehat{j}}$ Pending Request was successfully transitioned, and it was added to your watch list	L.					
North Carolina Age State University		Home	Position Descriptions	Classifications	My Profile	Help
Green confirmation bar indicating the Pending						
Request was successfully transitioned and						
added to your Watch List.						

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

Modify Position Description – EHRA

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

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

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

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

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

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

A&T STATE UNIVERSITY			(Inbox) (Watch List	PeopleAdmin POSITION MANAGEMENT V
Home	Position Descriptions Class	ifications My Profile	Help	
	SPA SPA Pending Requests FPA	Hover cursor	over Position	ovisor 💌 C logout
Welcome to your Online Recruitment and Posi	EPA Pending Requests	Descriptions on EHRA.	tab and click	

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.

4	NORTH CAROLINA AAT STOTE UNIVERSITY	Home	validon Descriptions Classifications My Profile		Admin N MANAGEMEN
	Descriptions / EPA A Position Descriptions		Acti	Supervisor ervisor.	C C
ist	Open Saved Saved + Search: of position descr we user type.		Search More search options	Searches are customizable by position attributes and can be saved for later use.	pr, or
	Save Search Pe	ecriptions O			Actions
0	Working Position Title	Position Number	Department Intercollegiate Athletics	Position/Classification Title Assoc Director of Advictors	(Actions)
123			the second se		Actions •
	DHR EPA Position Test 1	12345	Student Affairs	Admissions Officer	Actions*
	DHR EPA Position Test 1 Director	12345	Student Affairs Compensation, Benefits & Position Management	Admissions Officer Director	

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

Position Descriptions /	EPA						
EPA Positio	n Descriptions					Create New Position E	escription
Open Saved S	earch v Search:		Search	More search options			
working title, a p	position description, select the osition number, or an employee	name.	isting position, select it from t	he list below by clicl	king on the working title.	To narrow your search, e	enter a
Ad hoc Search	Ad hoc Sea						
	arch. Au noc search (000	nems Found) 💽					Actions
e curou ec		← Previous 1 2 3	4 5 6 7 8 9	28 29	Next →		Actions
Working Position	n Title Position Nu					ast Updated	Actions (Actions)
				ervisor		ast Updated	
Working Positic	ssor 000002			ervisor	Status La	ast Updated	(Actions)
Working Position Chancellor/Profe	ssor 000002 Incellor 000003			ervisor	Status La	ast Updated	(Actions) Actions v
 Working Position Chancellor/Profering Assistant To Characteria VC Dev. and Unit 	ssor 000002 Incellor 000003			ervisor	Status La Active Active	ast Updated	(Actions) Actions ▼ Actions ▼
 Working Position Chancellor/Profering Assistant To Characteria VC Dev. and Unit 	ssor 000002 incellor 000003 r Relations 000005 Bus and Finance 000006			ervisor	Status La Active Active	ast Updated	(Actions) Actions ▼ Actions ▼ Actions ▼

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

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

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



EHRA Modify - Edit Pending Request Page - General Navigation

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

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

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



EHRA Modify - Saving to Return to a Pending Request Later

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

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

		Amy Braun, you have 0 messages. Supervisor 🗸 C I
nding Requests / / Modify Position Description / Assistant Director / Sum	many	
nung requests 7 7 moury rosition description / Assistant Director 7 Sum	indi y	
Modify Position Description: Assistant Dir (EPA) Edit Current Status: Draft	rector	Take Action On Pending Request workeLow Actions Keep working on this Pending Request
Position Type: EPA Created by: Amy Braun	1	Canceled (move to Canceled)
Section/Unit: Director Athletics Owner: Amy Braun		
Home	Position Descriptions Classifications M	y Profile Help
		Amy Braun, you have 0 messages. Supervisor
	Take Action X	1
	Take Action X	
Modify Position Description: Assistant D	Take Action X	Take Action On Panding Request +
Modify Position Description: Assistant D (EPA) Edit	Take Action ×	·
Modify Position Description: Assistant D (EPA) Edit Current Status: Draft	Take Action *	·
equeests / / Modify Position Description / Assistant Director / Su Modify Position Description: Assistant D (EPA) Edit Current Status: Draft Position Type: EPA Created by: Amy Brand Section/Unit: Director Athletics Owner: Amy Brand	Take Action *	·
Modify Position Description: Assistant D (EPA) Edit Current Status: Draft Position Type: EPA Created by: Amy Brat	Take Action *	·
Modify Position Description: Assistant D (EPA) Edit Current Status: Draft Position Type: EPA Created by: Amy Braut Section/Unit: Director Athletics Owner: Amy Braun	Take Action * Keep working on this Pending Request Comments (optional)	·
Modify Position Description: Assistant D (EPA) Edit Current Status: Draft Position Type: EPA Created by: Amy Braut Section/Unit: Director Athletics Owner: Amy Braun	Take Action * Irec Keep working on this Pending Request Comments (optional)	·

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

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

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

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



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

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

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



EHRA Modify - Classification Tab

If you are *not* requesting a change in EHRA title with this request,

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

If Title is not changing, click here

located in the orange box

Next>>

Editing Pending Request	Classification	Save <> Prev Next>>
Position Action Justif	If you are not requesting a change in EPA title with this request, click on the orange "Next>a	"
Classification	If you are not requesting a change in EPA due with this request, click on the orange "Next>a	
Position Details	If you are requesting an EPA Title Change, scroll down below the Selected Classification De specific title by key word. The Position/Classification title selected here may be a more gene	Navigate to the previous tab by
Position Funding Infor	button to the left of any Title and then SAVE to select it. After selecting a saving a title, proce	clicking on the "< <prev" button.<="" td=""></prev">
Add ADA Checklist Form	If in the process of viewing or changing a job/classification title you open the Classifications	rab, you have opened a new window within the system
EPA Designation Reques	and need to close the Classifications tab after reviewing the information. Closing this tab v request in progress.	will return you to the Position Descriptions tab and your

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

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

Supervisor	Supplemental Documenta	Selected Classification				
Pending Request Summary ETA Classification Information Position/Classification Assistant Director Job Code 82229 EPA Position Type EPANFac EPA Eclass EN Use this filter to search EHRA Position/ Classifications - Filter these results Use this filter to search EHRA Position/ Classification Titles by key words; i.e., "Associate". Ad hoc Search Ad hoc Search EPA Position Type Position/Classification EPA Feclass PositionClassification Filter these results Ad hoc Search Ad hoc Search PositionClassification PositionClassification EPA Position Type PositionClassification EPA Position Type Ad hoc Search PositionClassification PositionClassification EPA Position Type	 Supervisor 	Selected Classification				
EPA Classification Information Position/Classification Assistant Director Job Code 82229 EPA Position Type EPANFac EPA Position Type EPANFac EPA Classifications - Filter these results Use this filter to search EHRA Position/ Classification Titles by key words; i.e., Classifications - Filter these results Use this filter to search EHRA Position/ Classification Titles by key words; i.e., Ad hoc Search Ad hoc Search Ad hoc Search EPA E-class Position/Classification EPA E-class EPA E-class EPA Position Type Job Code Ad hoc Search Ad hoc Search EPA E-class Position/Classification EPA E-class EPA E-class EPA Position Type Job Code Ad hoc Search Ad hoc Search EPA E-class Position/Classification EPA E-class EPA E-class EPA Position Type Job Code Ad hoc Search Position/Classification EPA E-class Ad hoc Search EPA E-class EPA E-class EPA Position Type Ad hoc Search EPA E-class EPA E-cl	Employee	EPA Classification Deta	ils			
ck the radio tck the radio tck the radio tch radio	Pending Request Summary	EPA Classification Informat	ion			
ck the radio tck the radio tton next to the RA class title you ant to select, en click "Save"		Position/Classification	Assistant Director			
ck the radio tton next to the RA class title you int to select, en click "Save" Classification - Filter these results EN Use this filter to search EHRA Position/ Classification Titles by key words; i.e., "Associate". Ad hoc Search Ad hoc Search PositionClassification EPA E-class EN Ad hoc Search Ad hoc Search PositionClassification EPA E-class EPA Position Type Job Code (Actions Add hoc Search Ad hoc Search EPA E-class EPA Position Type Ad hoc Search Ad hoc Search Ad hoc Search EPA E-class EPA Position Type Ad hoc Search Ad hoc Search Ad hoc Search EPA E-class EPA Position Type Ad hoc Search Ad hoc Search Ad hoc Search EPA E-class EPA Position Type Ad hoc Search Ad hoc Search Ad hoc Search Ad hoc Search EPA E-class EPA Position Type Job Code (Actions of the type) Ad hoc Search EN EPANFac B1185 Actions of the type)		Job Code	82229			
ck the radio tton next to the IRA class title you ant to select, en click "Save" Use this filter to search EHRA Position/ Classification Titles by key words; i.e., "Associate". Ad hoc Search PositionClassification EPA E-class EPA Position Type Job Code (Actions (Actions) Iext>> Associate Director EN EPANFac 81185 Actions		EPA Position Type	EPANFac			
ck the radio tton next to the RA class title you ant to select, en click "Save" Classifications - Filter these results Classification Titles by key words; i.e., "Associate". Ad hoc Search Ad hoc Search Position/Classification EPA E-class EPA Position Type Job Code (Actions) Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search <th></th> <th>EPA Eclass</th> <th></th> <th>so this filtor to soar</th> <th>ch FHRA Position/</th> <th></th>		EPA Eclass		so this filtor to soar	ch FHRA Position/	
Ad hoc Search Position/Classification EPA E-class EPA Position Type Job Code (Actions) en click "Save" Associate Director EN EPANFac 81185 Actions) lext>>> Associate Administrator EN EPANFac 81635 Actions)	ck the radio	Classifications - Filter these results			•	
Ad noc Search Position/Classification EPA E-class EPA Position Type Job Code (Actions Associate Director EN EPANFac 81185 Actions Associate Dean F2 Fac11/12 80836 Actions Associate Administrator EN EPANFac 81635 Actions			<u> </u>	Associate"		
Position/Classification EPA E-class EPA Position Type Job Code (Actions Associate Director EN EPANFac Stations Associate Dean F2 Fact1/12 Stations Associate Administrator EN EPANFac Stations Stations 			L_",	issociate".	Ad hoc Search	8
ext>> Image: Construction of the second const	ton next to the RA class title you	Ad hoc Search	Ľ ",	Associate".	Ad hoc Search	X
Associate Administrator EN EPANFac 81635 Actions	ton next to the A class title you nt to select,					(Actions)
Associate Aufinitistiatori EN EPANPac 61053 Actions 4	ton next to the A class title you ht to select,	Position/Classification	EPA E-class	EPA Position Type	Job Code	
Associate Dean/Assoc Professor F2 Fac11/12 82324 Actions	ton next to the A class title you ht to select, n click "Save"	Position/Classification Associate Director	EPA E-class EN	EPA Position Type EPANFac	Job Code 81185	(Actions)
	ton next to the RA class title you nt to select, n click "Save"	Position/Classification Associate Director Associate Dean	EPA E-class EN F2	EPA Position Type EPANFac Fac11/12	Job Code 81185 80836	(Actions) Actions▼

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

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

EHRA Modify - Position Details Tab

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

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

EHRA Modify – Position Details Tab – Primary Responsibilities and

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

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

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

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

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

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

EHRA Modify – Position Details – Compliance and

Requirements Completing the final position details fields identifies all required and

	preferred qualifications.	
Supervisory		
Does this position supervise?	Please select This field is required. HELP TEXT: Supervisory positions conduct interviews, make imaginary decisions, provide salary recommendations, momitor and assign work, counsel and discipling employees under direct supervision, develop work plans and conduct performance appraisals for PERMANENT employees. If this position performs ALL of the ABO's supervisory responsibilities, please indicate the following:	
Percent of Time Spent	If Yes, then complete these fields	
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 Is this position considered an essential position?	es Information from this section is used to populate the job posting when it is time to recruit.	
Minimum Ba Experience/Education All	achelor's degree; or an equivalent combination of training and experience. Il degrees must be received from appropriately accredited institutions.	
Preferred Years Experience, Skills, Training, Education	×	
Required License or Certification		
* Valid NC Driver's License required?	Please select This field is required.	
* Commercial Driver's License Required?	Please select This field is required.	
* Physical Required?	Please select This field is required. Complete this page by clicking	
List any other medical/drug tests required	on Save and Next>>	
	Save << Prev	Next >>

EHRA Modify - Position Funding Information Tab

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

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

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

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

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



EHRA Modify - Add ADA Checklist Form Tab

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

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

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

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

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





EHRA Modify - Designation Request Form Tab

Complete the EHRA Designation Request Form <u>only when</u> modifying a position for review of EHRA Category change; for example, Instructional, Research, and Public Service position being converted to SAAO or a change in SAAO tier. These types of title changes will be reviewed by Classification and Compensation to determine compliance with N.C.G.S. 126, 116 and UNC Policy 300.1.1. Please note the specific organizational chart requirements below. For more information about EHRA non-faculty definitions, see http://www.northcarolina.edu/hr/hrab/HRAB_Submission_Process_2-2013.pdf. Once complete, click

	Home	Position Descriptions	Classifications	My Profile	Help		
					Linc Butler, you have 0 messages	Supervisor	▼ C logou
nding Requests / / Modify Posi	ition Description / Assist	ant Director / Edit					
Editing Pending Request	EPA Designation	Request Form				Save << Prev	Next >>
Position Action Justif	[₩] <u>Check spelling</u> ▼						
Classification				<i>c u</i>			
Position Details	determine compliance v	with N.C.G.S. 126, 116	and UNC Policy 300	1.1. Please no	sition for review by Classificatio te the specific organizational cha	art requirements bel	low. For
Position Funding Infor	more information about	EPA non-faculty defini	tions, see http://www	.northcarolina.e	edu/hr/hrab/HRAB_Submission_	Process_2-2013.pd	íf
Add ADA Checklist Form	This form is only necess	sary on a position modi	fication if the change	in responsibilit	ies would place the position in a	different EPA cate	jory.
EPA Designation Reques	Request Details						
Supplemental Documenta	Institution				Enter Unive	rsity inform	ation.
 Supervisor 							
Pending Request Summary	Division/School/Col	lege					
	Department						
	EPA Designatior Requested	Please select			EHRA		
	Proposed Position Inf	formation			1	the drop d	own
					list.		

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

EHRA Modify - Supplemental Documents Tab

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

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

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

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

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



EHRA Modify - Supervisor Tab

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

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

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

Pending Requests / / Modify Pos			Classifications My Profile H	Navigate to the prev clicking on the "< <p< th=""><th>•</th></p<>	•
Editing Pending Request	Supervisor			Save	<< Prev Next >>
Position Action Justif Classification Position Details	Position Descriptions - Filter	these results 🔶		ion descriptions by er these results".	ptions O
Click the radio	 Saved Search: "Pos Working Position Title 	ition Description Position Number	s" (6 Items Found) Department	Position/Classification Title	(Actions)
	EPA Position - 2	76767	······		Actions •
nosition					
	O DHR EPA Position Test 1	12345	View the position	descriptions	Actions
description you	DHR EPA Position Test 1 Director	12345			Actions • Actions •
description you want to select,		12345	summary by clickin	ng on "Actions",	
position description you want to select, then click	Director	22233	summary by clickin	ng on "Actions", clicking on the title.	Actions +

EHRA Modify - Pending Request Summary Tab

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

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

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

	Home Position De	scriptions Classifications	My Profile	Help			
				Linc Butler, you have 0 messages	Supervisor	▼ Ċ	logout
Pending Requests / / Modify Position Description	n / Assistant Director / Summary						
1				Take Action On Pendi	na Request 💌		
Modify Position Description	Assistant Director				ig request v		
(EPA) Edit							
Current Status: Draft							
	eated by: Amy Braun vner: Amy Braun						
	,						
Summary History Settings	Reports						
Position Action Justification		ck "Edit" to mal	va adita	to a tab			
Position Action Justification	Cin	LK EUIL LO MAI	le euits				
Position Action Justification							
pr New	Additional workload in the area o necessitated the creation of an a	f classification and compesnation has	3				
Blue Circle Check	Currently: blank	dational position.					
Blue Circle Check	08/01/2013						
Date	Currently: blank						
	\$55.000						
Requested Salary	\$55,000						

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



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

North Carolina A&T State University		(Inbox) PeopleAdmin Watch List POSITION MANAGEMENT
н	ome Position Descriptions Classifications My Prot	nie Help
Pending Requests / / Modify Position Description / Assistan	nt Director / Summary	Linc Butler, you have 0 messages. Supervisor 💽 C logout
Modify Position Description: Ass (EPA) Edit Current Status: Draft Created b Position Type: EPA Created b Section/Unit: Director Athletics Owner: Athletics Summary History Settings	Click on "Take Action On Pending Request", then select "Send to Department Head" to move the request to the next step in the approval workflow.	Alke Action On Pending Request WORKELOW ACTIONS Keep working on this Pending Request Canceled (move to Canceled) Send to Department Head (move to Department Head) Canceled (move to Canceled)
Position Action Justification Edit Position Action Justification		

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

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

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

]) "The physical activity of this posi	ition (Check all that apply a	nd at least one)" is require	d and All required fields must	be set before transitioning.	
A&T STATE UNIVERSITY				Watch L	ist
	Home	Position Descriptions	Classifications My Pro	file Help	

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

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

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

Modify Position Description – Post Doctoral

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

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

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

Home	Postings	Hiring Proposals	I My Profil	Click on Position Management.	Inbox Watch List	PeopleAdmin APPLICANT TRACKING POSITION MANAGEMENT
	rostings	Thing Troposals	T wy rom	Abolghasem Shahbazi, you ha	ave 0 messages.	Supervisor 👻 logout (ash)

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

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

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

NORTH CAROLINA ART STATE UNIVERSITY		(Inbox) PeopleAdmin Watch List POSITION MANAGEMENT •
Home	Position Descriptions	Classifications My Profile Help
	SPA	Abolghasem Shahbazi, you have 0 messages. Supervisor 👻 C logout (as
	SPA Pending Requests	
	EPA	
	EPA Pending Requests	
Welcome to your Online Recruitment and	Post Doctoral	
,	Post Doctoral Pending Reque	sts

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

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

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

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

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

Post Doctoral Posi	ition Descripti	ons				Create New Position D	escription
Open Saved Search 🔻	Search:		Search	lore search options			
		e option above. To modify an exis	sting position, elect it from the	list below by clicking	g on the working title. To	narrow your search, e	enter a
			sting position elect it from the	list below by clicking) on the working title. To	narrow your search, e	enter a
working title, a position nur	nber, or an employee		sting position elect it from the	list below by clickin	g on the working title. To	narrow your search, e	enter a
working title, a position nur			sting position elect it from the	list below by clickin	g on the working title. To	narrow your search, e	
To create a new position d working title, a position nur Ad hoc Search Ad hoc Search (3 Items	nber, or an employee	e name.	sting position elect it from the	list below by clickin	g on the working title. To	narrow your search, e	enter a
working title, a position nur d hoc Search	nber, or an employee	e name.	Sting position elect it from the Employee Last Name	list below by clickin	g on the working title. To Department	narrow your search, e Section/Unit	Actions
working title, a position nur d hoc Search Ad hoc Search (3 Items	 Position 	e name. search? Employee First	Employee Last				
working title, a position nur d hoc Search Ad hoc Search (3 Items Working Position Title	 Tournal and the second s	e name. search? Employee First Name	Employee Last Name	Status	Department	Section/Unit	Actions (Action

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

Position Descriptions / Post Doctoral / Post Doctoral Res Position Description: Post D Associate (Post Doctoral) Current Status: Active Decima Law DeciDectoral		Print Preview (Employee View)
Position Type: Post Doctoral Section/Unit: Bioenergy Center	Click here to initiate the request.	★ View Supervisor ★ Modify Position Description
Summary History Classification		

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



Post Doctoral Modify - Edit Pending Request Page - General Navigation

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

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

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

Tab list		
Editing Pending Request	scription / Post Doctoral Research Associate / Edit Position Action Justification	Save and Next buttons
Position Action Justif		
Classification Classifi		ed to complete position description
 Supplemental Documenta 	The proposed effective date must be a future date, subject to ch amount to be identified with a funding source and is subject to D	ange based on date of hire. The requested salary must reflect a budgeted available HR and budget review and approval.
Supervisor Employee Pending Request Summary	To stop and return to request later, select	
Blue Check Circle	"Pending Request Summary"	tto DORED

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

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

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

NORTH CAROLINA A&T STATE UNIVERSITY						Watch List	POSITION MANAGEMENT
		Home	Position Descriptions	Classifications	My Profile Help		
					Abolghasem	Shahbazi, you have 0 messages.	Supervisor 🗸 C logou
ding Requests / / Modify I	Position Descriptio	I / Post Doctoral Rese	arch Associate / Summary				
_							_
Modify Position	on Descript	ion: Post Doc	toral			Take Action On Pending Rec	quest 🔻
_	on Descript	ion: Post Doc	toral			Take Action On Pending Rec WORKFLOW ACTIONS Keep working on this Pend Request	
Modify Position Research Ass Current Status: Draft Position Type: Post Do	on Descript sociate (Pos	ion: Post Doc t Doctoral) E Created by: Abolg	toral idit Ihasem Shahbazi			WORKFLOW ACTIONS Keep working on this Pend	ling
Modify Positie Research Ass Current Status: Draft	on Descript sociate (Pos	i on: Post Doc t Doctoral) E	toral idit Ihasem Shahbazi		_	WORKFLOW ACTIONS Keep working on this Pend Request	ling ed)

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

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

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

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

Modify Position De Research Associa Current Status: Draft		
Position Type: Post Doctoral Section/Unit: Bioenergy Cen		Created by: Abole asem Shahbazi
Summary History	Settings	Description" request already started and saved.

The

Post Doctoral Modify - Position Action Justification Tab

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

Editing Pending Request	Position Action Justification	Save Next>>
Position Action Justif Classification	Check spelling To request a post doctoral reappointment, the , Principal Investigator (PI)	must submit this action with (1) a copy of the Postdoctoral Reappointment
 Position Details Position Funding Infor Add ADA Checklist Form 	Letter and (2) a copy of the Postdoctoral Scholar Annual Evaluation Form	
 Aud ADA Checkist Ponn Supplemental Documenta Supervisor 	The proposed effective date must be a future date, subject to change baa amount to be identified with a funding source and is subject to DHR and	budget review and approval. 1. Select the reason(s) for the
 Employee Pending Request Summary 	* Required Information Position Action Justification	modification request.
Required fields	Add Position Details for Posting Reappointment End Appointment, Return Position # to [Funding Source Change Reappointment Extension Exception (D) Change Reporting Relationship (Supervi: Abolish Position (DORED Function Only This field is required.	ORED Approved) sor or Organization)

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

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

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



Post Doctoral Modify - Classification Tab

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

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

Post Doctoral Modify - Position Details Tab

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

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

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

	Primary Function of Organizational Unit	The Biological Engineering Program affiliated with the Department of Natural Resources (School of Agriculture & Environmental Sciences) and Department of Chemical, Biological and Bioengineering (College of Engineering) at North Carolina AtT State University is seeking a Postdoctoral Research Associate in the area of biomass gasification. This position will be supported by the NSF	The Organizational Unit information should include factors such as department size and operating or grant budgets which
F	Position Information		are helpful to an analyst for
The appointment	Working Position Title	Post Doctoral Research Associate	determining a position's scope.
	Position Number	010000	
length must indicate the date the earliest fund	Building and Room No.	SOCKWEIT HAIT, ROOM 107	ne appointment type for post- octoral is always time-limited
supporting the	Appointment Type	Time Limited - Full-time All Post Doctoral appointments are time limited. Departments should are completed by budget officers and DHR no later than the establis	
position's budget (if there are	If Time Limited, Appointment Length	06/30/2014 Please indicate budget end date. If funded from more than one	dit the appointment period from
multiple fund	Appointment Period	Initial Appaintment, Tetucar	he drop down menu.
sources) ends.	Current Budgeted Salary	\$60,000	•

Post Doctoral Modify – Position Details Tab – Primary Responsibilities

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

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

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

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

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

Primary Responsibilities and Duties					
please click the "Add Primary Responsibilities	using the three categories of Instructional, Research, and Administrative. To enter duties and Duties Entry" button. Repeat for each category relevant to job functions and SAVE try is required to complete a position description request				
If the position requires duties in more than a si		on.			
and job duties. The total percentage of time allocated for all categories should equal 100%					
A sample Post Doctoral Scholar position descr	intion is available for your reference at this link: http://www.ncat.edu/hr/documents/post-				
	ription is available for your reference at this link: http://www.ncat.edu/hr/documents/post- ay copy and paste wording from this template into the "Primary Responsibilities and Duties				

doc/pd_job_description_te Entry."	section to add or ed	lit job duties.
* Function	Research 🔻	
Describe the specific tasks and	The successful candidate must be able to independently conduct research on one or the following subjects: (1) analysis of b gasification chemistry, (2) syngas cleani technology, (3) computational fluid dynami	ng down list.
responsibilities related to the function.	(CFD) modeling of fluidized bed garificat (4) design and operation of fluid gasifier, and (5) life cycle assessment o biomass gasification.	Describe or revise specific tasks and
* Percentage of Time	100%	
Remove Entry?	•	Indicate percentage of time spent performi

Post Doctoral Modify – Position Details – Compliance and Requirements

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



Post Doctoral Modify - Position Funding Information Tab

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

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

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

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

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



Post Doctoral Modify - Add ADA Checklist Form Tab

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

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

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



Post Doctoral Modify - Supplemental Documentation Tab

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

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

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

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

Evaluation form: <u>http://www.ncat.edu/hr/documents/post-doc/postdoctoral_evaluation_form.doc</u> Reappointment Letter: <u>http://www.ncat.edu/hr/documents/post-</u> doc/pd_employment_reappt_offer_ltr_template.doc

Editing Pending Request	Supplemental Documentation	Save << Prev Next
 Position Action Justif Classification Position Details Position Funding Infor Add ADA Checklist Form 	to support action, download it from the Budget and Plan services-documents/budget-revise xlsx), complete it, s For Post Doctoral Reappointments only, (when modifyin as an attachment. A copy of the Post Doctoral Reappoint	be returned to Initiator if a current org chart is not attached. If Budget Revision Form is need ning Web Site (http://www.ncat.edu/research/docurnents/dored-docurnents/research- ave it, and select "Upload New" as the option under Actions. Ing a post doctoral appointment), the Postdoctoral Scholar Annual Evaluation Form is require Intment Letter should also be attached as "Other Docurnent." Links to the form and a templitter, save it, and select "Upload New" as the option under Actions.
Supplemental Documenta	Evaluation form: http://www.ncat.edu/hr/documents/pos	st-doc/postdoctoral_evaluation_form.doc
Supervisor	Reappointment Letter: http://www.ncat.edu/hr/document	nts/post-doc/pd_employment_reappt_offer_ltr_template.doc
Employee	Excel and Word documents may be attached.	
Pending Request Summary	PDF conversion must be completed for the document to	
	Document Type Name Status (Actions)	Create New, Choose Existing, or Add by
	Organizational Chart Actions •	URL in order to upload an attachment.
	Budget Revision Form Upload New	
	Other Document Choose Existing	Action
	Post Doctoral Evaluation Add by URL	Attach a saved copy of the Post Doctoral Evaluation form when submitting a

Post Doctoral Modify - Supervisor Tab

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

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

ding Requests / / Modify Position	Home Position Descriptions CI	assifications My Profile He	Navigate to the previous tab by clicking on the "< <prev" button.<="" th=""></prev">
Editing Pending Request Position Action Justif	Supervisor Position Descriptions - Filter these results	Search all positi	Save <prev next="">> on descriptions by</prev>
lick the radio utton next to the osition escription you vant to select,	Saved Search: "Position Descriptions" Working Position Position Description Title Post Doc Resarch Associate Post Doc Resarch Associate	"(1 Item Found) View the position d summary by clickin	-
hen click Next>>". Editing Pending Request			Save <pre><pre>Next>></pre></pre>
 Position Action Justif Classification 	Supervisor The Supervisor Tab allows you to select the position t these results" to search all supervisors by a key word		you are not editing from an existing position, use "Filter
Position Details			

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

Supervisor

Employee
Pending Request Summary

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

Selected Supervisor

-	Search Position Descriptions Search:		
-	Position Type: Add SPA Column: Post Doctoral Post Doctoral Department:	Select EHRA as Pos under "Filter These Re different supervisor ne	esults" if a
Position Des	First Name:	assigned	
Ad hoc S		Search Cancel	Ad hoc Search

Post Doctoral Modify - Pending Request Summary Tab

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

		Home	Position Descriptions	Classifications	My Profile	Help			
						Linc Butler, you have 0 messages.	Supervisor	▼ C logo	out
Pending	Requests / / Modify Position Description / P	ost Doctoral Rese	arch Associate / Summary						
		octoral) E	dit hasem Shahbazi			Take Action On Pendin	g Request ▼		
	Position Action Justification Position Action Justification	Edit	Click "Ed	it" to make	e edits to	o a tab.			
	Blue Circle Check	Test Currently: blank 08/31/2013 Currently: blank							
	Basis for EPA Status	Test							

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

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

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

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

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

	Take Action	×			
	Send to Department Head (me Department Head)				
	Comments (optional)		the next le	nal and can be evel approver	
ו has	Add this pending request to your list?		List allo	the action to you ows you to easily t r the action's prop	track and
	Submit	Cancel //			

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

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

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

Pending Request was successfully transitioned, and it was added to your watch list					
North Carolina Age State University	Home	Position Descriptions	Classifications	My Profile	Help
Green confirmation bar indicating the Pending		-			
Request was successfully transitioned and					
added to your Watch List.					

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

Section 3: Applicant Tracking

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

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

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

Create New Posting – General Navigation

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

					Inbox People/	Admin
Home	Postings	Hiring Proposals	My Profile	Click on Applicant Tracking.		NT TRACKING V
				Linc Butler, you have 0 r	messages. Supervisor	C logout

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

Home Postings Hiring Propose	nis My Profile Help	Inbox PeopleAdmin Watch List APPLICANT TRACKING V POSITION MANAGEMENT
	First select the appropriate user type: Supervisor, Department Head, <u>or</u> Dean /Vice Chancellor.	Supervisor Cologout
nt and Position Management System		Then click on the Refresh button.

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

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

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:

e for posting (SHRA , EHRA, Post Doctoral	NORTH CAROLINA A&T STATE UNIVERSITY						IeAdmin ICANT TRACKING
d click on desired position EPA be for posting (SHRA , EHRA, st Doctoral). resonance to your onnine resonance of d Position Management System Inbox (11 items need your attention) Displaying items for group "Supervisor".	ver cursor over F	Postings tab		als My Profile	Help		
De for posting (SHRA , EHRA, Post Doctoral Post Doctoral Post Doctoral Post Doctoral Post Doctoral Create New SPA Posting Create New Post Doctoral Posting	d click on desired	d position			Linc Butler, you have (0 messages. Supervisor	▼ ¢
st Doctoral). St Doctoral Position Shortcuts Create New SPA Posting Create New SPA Posting Create New SPA Posting Create New Post Doctoral Posting	be for posting (SF	IRA , EHRA,					
Inbox (11 items need your attention) Displaying items for group "Supervisor". Shortcuts Create New SPA Posting Create New PAP Dosting Create New PAP Dosting	st Doctoral).						
IDDX (11 items need your attention) Create New SPA Posting Create New SPA Posting Create New EPA Posting Create New Post Doctoral Posting Create New Post Doctoral Posting							
Displaying items for group "Supervisor". Create New SPA Posting Create New EPA Posting Create New Post Doctoral Posting Create New Post Doctoral Posting	Welcome to your orm	nie neorannen an d Positi	ion Management System				
Create New Post Doctoral Posting	Woldenie to your enin		ion Management System		s	Shortcuts	
Postings (2) Hiring Proposals (0) Pending Requests (9) Special Handling Lists (0)	Weicenie to your eni		ion Management System		C	Create New SPA Posting	
	Linbox (11 items need	d your attention)	ion Management System			Create New SPA Posting Create New EPA 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**:

NORTH CAROLINA A&T STATE UNIVERSITY						Watch List	APPLICANT TRACKING
ver cursor over Postings	Post	tings Hiring Proposals	My Profile	Help			
and click on SHRA.	SP/			Linc Butler, ye	ou have 0 messages.	Supervisor	r 🔹 C
	EPA	4					
	Pos	st Doctoral					
Welcome to your Online Recruitment					Shortcuts		

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

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

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

4	NORTH CAROLINA A&T STATE UNIVERSITY		Home Pog	stings Hiring Proposals My P	Profile Help			IeAdmin ICANT TRACKING
-	s / spa A Postings				Active u Supervi	user type is sor.	Supervisor	New Posting
	Open Saved Search T Search:		Search More sea	arch options	Searches are	e customizabl	le by	
9	List of current / p SHRA postings by Search Science Type.	active		-	oosition attr saved for lat	ibutes and ca er use.	an be	Actions
9	SHRA postings by	active	Position Number	-			Lest Updated	Actions (Actions)
0	SHRA postings by	round)	Position Number TLBS	S	saved for lat	er use.		
C 0	SHRA postings by	Found) Posting Number		Department	saved for lat	Cer use.	Last Updated	(Actions)
C	SHRA postings by d search closed Victors Working Title Employee Relations Counselor (TLBs)	Found) Posting Number SPA33	TLB8	Department Employee Relations	Active Applications	Cicsed	Lest Updated August 01, 2013 at 03.03 pm	(Actions) Actions •
	SHRA postings by Sed Search "Closed" (Clarks Working Tile Employee Relations Counselor (TLB) Employee Relations Counselor (TLB)	Found) Posting Number SPA035 SPA034	TLB8 TLB7	Department Employee Relations Employee Relations	Active Applications	Closed	Last Updated August 01, 2013 at 03.03 pm August 01, 2013 at 10.21 am	(Actions) Actions • Actions •
	ShrRA postings by Sold Search "Closed" (Jitems Working Title Employee Relations Counselor (TLB) Employee Relations Counselor (TLB7) Employee Relations Counselor (TLB7)	Found) Posting Number SPA035 SPA034 SPA032	TLB8 TLB7 TLB7B	Department Employee Relations Employee Relations Employee Relations	Active Applications	Workflow State Closed Closed	Last Updated August 01, 2013 at 03 03 pm August 01, 2013 at 10 21 am August 01, 2013 at 09 33 am	(Actions) Actions v Actions v Actions v
	Administrative Support Assoc	Found) Posting Number SPA035 SPA034 SPA032 SPA018	TLB8 TLB7 TLB7B 001111	Department Employee Relations Employee Relations Employee Relations Classification & Compensation	Active Applications	Workflow State Coord Closed Closed	Last Updated August 01, 2013 at 03.03 pm August 01, 2013 at 10.21 am August 01, 2013 at 10.21 am July 31, 2013 at 12.52 pm	(Actions) Actions▼ Actions▼ Actions▼
	SHRA postings by Gearch: Closed Violant Vorang Tile Employee Relations Counselor (TLB) Employee Relations Counselor (TLB) Administrative Support Asacc Employee Relations Counselor (TLB)	Found) Posting Number SPA35 SPA34 SPA32 SPA18 SPA28	TLB8 TLB7 TLB7B 001111 TLB6	Department Employee Relations Employee Relations Classification & Compensation Employee Relations	Active Applications	Workflow State Closed Closed Closed Closed	Last Updated August 01, 2013 at 03.03 pm August 01, 2013 at 09.33 am August 01, 2013 at 102.13 am July 31, 2013 at 12.52 pm July 31, 2013 at 10.58 am	(Actions) Actions▼ Actions▼ Actions▼ Actions▼
	SHRA postings by working Tile Employee Relations Counselor (TLB) Employee Relations Counselor (TLB) Administrative Support Assoc Employee Relations Counselor (TLB) Administrative Support Assoc	Found) Posting Number SPA035 SPA034 SPA034 SPA032 SPA018 SPA028 SPA027	TLB8 TLB7 TLB7B 001111 TLB6 000051	Department Employee Relations Employee Relations Employee Relations Classification & Compensation Employee Relations Classification & Compensation	Active Applications	Workflow State Closed Closed Closed Closed Closed Closed	Last Updated August 01, 2013 at 03 03 pm August 01, 2013 at 10 21 am August 01, 2013 at 09 23 am July 31, 2013 at 10 25 pm July 31, 2013 at 10 58 am July 31, 2013 at 10 9.15 am	(Actions) Actions▼ Actions▼ Actions▼ Actions▼ Actions▼ Actions▼
	Administrative Support Assoc Employee Relations Counselor (TLBS) Administrative Support Assoc Employee Relations Counselor (TLB) Administrative Support Assoc Employee Relations Counselor (TLBS)	Found) Posting Number SPA035 SPA032 SPA018 SPA022 SPA018 SPA027 SPA027 SPA022	TLB8 TLB7 TLB78 001111 TLB6 000051 TLB5	Department Employee Relations Employee Relations Classification & Compensation Classification & Compensation Classification & Compensation Employee Relations	Active Applications	Workflow State Closed Closed Closed Closed Closed Closed Closed	Last Updated August 01, 2013 at 03.03 pm August 01, 2013 at 03.03 pm July 31, 2013 at 10.21 am July 31, 2013 at 10.25 pm July 31, 2013 at 10.55 am July 31, 2013 at 01.55 am July 30, 2013 at 03.42 pm	(Actions) Actions ▼ Actions ▼ Actions ▼ Actions ▼ Actions ▼ Actions ▼ Actions ▼
	Beneficial Search: Closed Violations Search: Closed Violations Search: Closed Violations Vorking Title Employee Relations Counselor (TLB9) Employee Relations Counselor (TLB7) Administrative Support Assoc Employee Relations Counselor (TLB6) Administrative Support Assoc Employee Relations Counselor (TLB9) Employee Relations Counselor (TLB9)	Found) Posting Number SPA35 SPA34 SPA32 SPA018 SPA02 SPA018 SPA028 SPA027 SPA022 SPA021	TLB8 TLB7 001111 TLB6 000051 TLB5 TLB5	Department Employee Relations Employee Relations Classification & Compensation Employee Relations Classification & Compensation Employee Relations Employee Relations Employee Relations	Active Applications 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Workflow State Closed Closed Closed Closed Closed Closed Closed Closed	Lest Updated August 01, 2013 at 03:03 pm August 01, 2013 at 03:21 am August 01, 2013 at 10:21 am July 31, 2013 at 10:58 am July 31, 2013 at 10:58 am July 31, 2013 at 09:15 am July 30, 2013 at 03:42 pm July 30, 2013 at 11:09 am	(Actions) Actions ▼ Actions ▼ Actions ▼ Actions ▼ Actions ▼ Actions ▼ Actions ▼

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

					Inbox Watch List	PeopleAdmin Applicant tracking	•
Home Posting	s Hiring Proposals	My Profile	Help	Linc Butler, you have 0 messages.	Supervisor	C C	logout
				Click here to initiate a Create New Posting request.		Create New Posting	
Search More search o	ntions						

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



Create New SHRA Posting – Create from Posting

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

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

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



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

NORTH CAROLINA ALT STATE UNIVERSITY							eAdmin CANT TRACKING
stings / SPA SPA Postings		Home Pos	stings Hiring Proposals My F		iser type is sor.	Supervisor	▼ ¢
Open Saved Search + Search:		Search More sea	arch options	Searches are	customizabl	e by Actio	ns dro
List of current / pe SHRA postings by user type.	active			position attr saved for lat	ibutes and ca		n men
SHRA postings by	active	Position Number			ibutes and ca		Actions
SHRA postings by	Found)	Position Number TL88	1	saved for lat	ibutes and ca er use.	an be down	Acti
SHRA postings by	Found) Posting Number		Department	saved for lat	ibutes and ca er use.	an be down	Acti (Actions)
SHRA postings by	Found) Posting Number SPA035	TLB8	Department Employee Relations	Active Applications	ibutes and ca er use. Workflow State Closed	Last Updated August 01, 2013 at 03.03 pm	Acti (Actions Actions
SHRA postings by Serich: "Closed" (I.Filents f Working Title Employee Relations Counselor (TLB) Employee Relations Counselor (TLB)	Found) Posting Number SPA35 SPA34	TLB8 TLB7	Department Employee Relations Employee Relations	Active Applications	ibutes and ca er use. Workflow State Closed	An be down	Actions (Actions Actions •
SHRA postings by Subsect: Closed Victors (Working Title Employee Relations Counselor (TLB7) Employee Relations Counselor (TLB7)	Found) Posting Number SPA035 SPA034 SPA032	TLB8 TLB7 TLB7B	Department Employee Relations Employee Relations Employee Relations	Active Applications	Vorkflow State Closed	Last Updated August 01, 2013 at 03.03 pm August 01, 2013 at 10.21 am August 01, 2013 at 09.33 am	Acti (Actions Actions v Actions v Actions v
SHRA postings by Search "Closed" (1916) Vorking Title Employee Relations Counselor (TLBR) Employee Relations Counselor (TLBR) Administrative Support Assoc	Posting Number SPA035 SPA034 SPA032 SPA018	TLB8 TLB7 TLB7B 001111	Department Employee Relations Employee Relations Employee Relations Classification & Compensation	Active Applications	Vorkflow State Closed Closed Closed	Last Updaed August 01, 2013 at 03.03 pm August 01, 2013 at 10.21 am August 01, 2013 at 10.21 am July 31, 2013 at 12.52 pm	Actions (Actions Actions + Actions + Actions +
SHRA postings by Search: "Closed (I.F.I.C.) Working Title Employee Relations Counselor (TLB) Employee Relations Counselor (TLB) Administrative Support Assoc Employee Relations Counselor (TLB)	Posting Number SPA035 SPA034 SPA032 SPA018 SPA028	TLB8 TLB7 TLB7B 001111 TLB6	Department Employee Relations Employee Relations Classifications & Compensation Employee Relations	Active Applications	butes and ca er use.	Last Updated August 01, 2013 at 02:03 pm August 01, 2013 at 10:21 am August 01, 2013 at 03:03 am July 31, 2013 at 10:58 am	Actions (Actions Actions + Actions + Actions + Actions +
SHRA postings by Subscription of the second	Found) Posting Number SPA035 SPA034 SPA032 SPA038 SPA028 SPA028 SPA027	TLB8 TLB7 TLB7B 001111 TLB6 000051	Department Employee Relations Employee Relations Classification & Compensation Employee Relations Classification & Compensation	Active Applications	ibutes and ca er use. Vortilow State Closed Closed Closed Closed Closed	Last Updated down August 01, 2013 at 03:03 pm August 01, 2013 at 03:03 pm August 01, 2013 at 02:13 am July 31, 2013 at 12:52 pm July 31, 2013 at 12:52 pm July 31, 2013 at 02:33 am July 31, 2013 at 02:15 am July 31, 2013 at 02:15 am	Actions Actions Actions Actions Actions Actions Actions Actions
SHRA postings by Survey of Search Closed (1916) Survey of Search (1916) Survey of Search (1916) Survey of Search (1917) Survey of Search (1918) Survey of Search (191	Posting Number SPA036 SPA037 SPA032 SPA032 SPA038 SPA032 SPA038 SPA037 SPA027 SPA027 SPA022	TLB8 TLB7 TLB78 001111 TLB6 000051 TLB5	Department Employee Relations Employee Relations Classification & Compensation Classification & Compensation Classification & Compensation Employee Relations	Active Applications	Vorkfow State Closed Closed Closed Closed Closed Closed Closed Closed	Last Updaed August 01, 2013 at 03:03 pm August 01, 2013 at 02:03 pm August 01, 2013 at 10:21 am July 31, 2013 at 10:53 am July 31, 2013 at 10:53 am July 31, 2013 at 03:42 pm	Actions Actions Actions Actions Actions Actions Actions Actions
SHRA postings by Search Closed (1996) Voting Tite Employee Relations Counselor (TL89) Employee Relations Counselor (TL87) Employee Relations Counselor (TL87) Employee Relations Counselor (TL87) Counselor (TL87) Employee Relations Counselor (TL86) Counselor (TL86) Employee Relations Counselor (TL86) Employee Relations Counselor (TL86) Employee Relations Counselor (TL84)	Posting Number SPA035 SPA034 SPA035 SPA034 SPA035 SPA036 SPA037 SPA038 SPA039 SPA020 SPA021	TLB8 TLB7 001111 TLB6 000051 TLB5 TLB4	Department Employee Relations Employee Relations Classification & Compensation Employee Relations Classification & Compensation Employee Relations Employee Relations	Active Applications	Varkflow State Closed Closed Closed Closed Closed Closed Closed Closed Closed Closed Closed	Last Updated August 01, 2013 at 03:03 pm August 01, 2013 at 02:03 pm August 01, 2013 at 02:24 am July 31, 2013 at 02:25 pm July 31, 2013 at 05:8 am July 31, 2013 at 06:915 am July 30, 2013 at 01:42 pm July 30, 2013 at 01:42 pm	Actions Actions Actions Actions Actions Actions Actions Actions Actions Actions

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



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

Create New Posting button to begin updating posting information:

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

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

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

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

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

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

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

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

Editing Posting	Posting Details		Save and Next buttons.	Save Next >>	
Posting Details				,	
	Position Funding Infor To create a Postino. first complete the information on this screen, then click the Next button or select the page in the left		left hand navigation menu. Proceed through all sections completing al	necessary information. To submit the	
 Supplemental 	Questions Posting to Human Resour	ces, you must go to the Posting Summary Page by clicking on the Next button until you re over your mouse over the orange Action button for a list of possible approval step options.	each the Posting Summary Page or select Posting Summary Page from	n the left navigation menu. Once a	
 Applicant Docu Search Comm 	* Required Information				
 Ranking Criter 	Classification Informatio	n			
 Posting Docum 	If the details below are in	correct, please make the appropriate Classification selection using the "Classification	' Tab on the left side menu while modifying the Position		
Summary	Position/Classification Title	Human Resources Specialist	Fields from the existing pos	sting will be	
	Job Code	11804		-	
	Classification Type	SPA	copied in to your new post	ing.	
	Salary Range	\$29,709 - \$58,106			
	Hiring Range				
	Contributing Reference	⁸ \$36,304	Enter a hiring range if desir	ed.	
	Rate		0 0		
	Journey Market Rate	\$46,107			
	Advanced Reference Rate	\$52,101			
	Minimum	Bachelor's degree; or an equivalent combination of training and experience.			
	Experience/Education	All degrees must be received from appropriately accredited institutions.	Enter preferred years of ex	perience, skills,	
		Test	training and education.		
	Preferred Years		training and education.		
	Experience, Skills, Training, Education				
		Ψ.	Click to view Compete	nov Drofilo	
	Competency Profile	http://www.osp.state.nc.us/Guide/CompWebSite/Profiles/HR%20Specialist%20Profile.pdf		incy Prome.	
Position Overview Primary Purpose of Position Primary Function of Organizational Unit Work Hours: From [time] to [time] on [days		Test Test M-f 8-5pm	Continue to enter posting information into any emp fields as needed.		
Ke	of week] Key Responsibilities and Related Competencies				
	Required Competency Description	Applied Knowledge - HR Program and Organiz Performs X, Y, and Z.	zation		
	Required Competency	Customer Service			
Description		Performs A, B, and C.			
Required Competency		Communication - Verbal/Written			
	Description	Performs H.			

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

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

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

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

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

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

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

stings / SPA / <u>Employee Relations Coun</u>	Linc Butter	r, you have 0 messages. Supervisor 💽 🤇
Editing Posting	Position Funding Information	Save <> Prev Next
Posting Details	Check spelling	
Position Funding Infor		
Supplemental Questions	* Required Information	
Applicant Documents	Budget Advisory Approval	
Search Committee	All recruitment of permanent EPA and SPA positions that are funded in whole or in p A&T's Budget Advisory Committee. To receive consideration of the Committee's revi	
Ranking Criteria	essential, and / or key objectives will not be met if the position is not filled.	State what mission
Posting Documents		specific, essential,
Summary	Mission Specific, Essential and/or Key Objectives not Met without position	and/or key objective will not be met if position is not filled.

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

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

1) FTVORGN- Provides a list of Org Codes

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

3) FTVACCT- Provides a list of Accounts

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

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

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

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

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

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

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

Cate	gory: Any	 Keyword 	l:			Filter supplemental question
Add	Category	Question				by keyword or category.
	Uncategorized	How did you hear	about this emplo	yment opp	ortunity?	
	Experience	Do you have at lea experience?	ast one year of re	esponsible	payroll or financial and s	statistical record keeping
	Education	Do you have a hig	h school diploma	a or equival	ent?	
	Experience	Do you have HR e	experience?			
	Education	Do you have a Hig	gh School diplom	ia?		
	Education	Do you have a Ma	ster's Degree?			
	Education	Do you have a Ma	ster's Degree?			
	Experience	How many years of	of Accounting ex	perience do	you have in a higher e	ducation setting?
	Education	Do you have a Hig	gh School diplom	ia?	Click to submit a	custom supplemental
	Experience	Do you have at least 4 years of experience?		question for revi		
Click ch	aying all 10 neck box to ac g supplement			Click Su finishe	ıbmit when	you want? Add a new one

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

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

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

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

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

ostings / SPA / Employee Relations Cou	nselor (TLB10) (E	Draft) / Edit: Applicant Documents			
Editing Posting		ncluded to make ding a document	optional.	Click <u>both</u> Included <u>and</u> Required make uploading a document req	xt >>
Posting Details	Included	to make the document(s) ma	roc ndatory to complete th	application process.	
Position Funding Infor				+	
Supplemental Questions	Order	Name	Included?	Required?	
Applicant Documents	1	Resume			
Search Committee					
Ranking Criteria	2	Cover Letter			
Posting Documents					
Summary	3	Curriculum Vitae			
	4	Teaching Philosophy			
	5	Letter Of Reference 1			
	6	Letter Of Reference 2			
	7	Letter Of Reference 3			

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

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

In the **Search Committee** tab, you can assign search committee members who will have access to review application information for a specific posting. Search committee members can view applications, applicant documents, and evaluate / rank applicants based upon ranking criteria you establish as part of the posting. Requests to add search committee members will be reviewed and approved by the Division of human Resources (DHR) once the posting request is routed to DHR for approval. Upon DHR approving a search¹⁰

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

Editing Posting	Search Committee	Save <prev next="">>></prev>
Posting Details	Search Committees are advisory in pature	and serve the purpose of recruiting a qualified applicant pool, reviewing their credentials, and
Position Funding Infor	recommending acceptable candidates to	the hiring manager. Search Committees can consist of University employees both internal and externa
Supplemental Questions		ternal to the University who represent key stakeholders.
Applicant Documents	Search Committee Members	
Search Committee	No Search Committee Members have bee	en assigned to this Posting yet.
Ranking Criteria	Search	
Posting Documents	Search	
Summary	Find a User to assign as a Search Comm	ttee Member.
	First Name	
	Last Name	To search for a pre-approved search
	Email Address	committee member, enter the name and

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

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

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

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

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

Preferred Group Em Add User Clear Matching Users New Search Com Request that someone	un ailaddress@zed.zed ployee	Click the Add User button to add the new search committee member in a pending status. Access will be reviewed and approved by DHR.	
Required fields are indi	cated with an asterisk (*).		
Account Information			
	ving information to create an ar	account for a new Search Committee Member.	
* First Name	Amy	account for a new Search Committee Member.	
* Last Name	Braun		
* Email	ambraun@ncat.edu		
* Username	ambraun		

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:

	selor (TLB10) (Draft) / Edit: Ranking Crit	ena				
Editing Posting	Ranking Criteria				Save << Prev	Next
Posting Details				t review process to rank applicants		
Position Funding Infor	 experience and education fact criteria are not presented to th 		elpful in identifyi	ing the most qualified candidates in	n an applicant pool. R	anking
Supplemental Questions				dialog box will appear where you	can add an existing cr	iterion by
Applicant Documents	5	column or submit a new one fo	r approval		d ⁶ Add o Critori	ere" \Albe
Search Committee	 Submitting New Ranking Crite the Available Evaluative Criter 		Click to	add ranking criteria	ed "Add a Criteri	on . whe
Ranking Criteria	Included Evaluative Criteria			0		ld a Criteri
Posting Documents	Category Descr	iption		Weight Workflow State	Status	
Summary						

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

Category: Any Keyword: Search for ranking criteria by keyword or category. Add Category Description Search for ranking criteria by keyword or category. Uncategorized Rank Experience - 5 is the highest Indicate the applicant workflow state that allows an applicant to be ranked. 1. 1. 2. 3.3 4.4 5.5 Applicant workflow state Under Review by HR Image: Carl find the one you want? Add a new one	Add a Ranking Crite					×
 Uncategorized Rank Experience - 5 is the highest Possible Answers: 1 2 3 4 5 Applicant workflow state Under Review by HR Uncategorized Please rate the candidates experience related to the job: Uncategorized Teaching experience in a university Diplaying all 3 						
Oricategorized Please rate the candidates experience related to the job. Uncategorized Teaching experience in a university Diplaying all 3 Can't find the one you want? Add a new one	Uncategorized	Possible Answers: 1. 1 2. 2 3. 3 4. 4 5. 5	Indicate the applican that allows an applic		be ranked.	ar Is Of to
lick check box to add an	Uncategorized	Teaching experience in a uni	iversity	crite	rion for review a	nd approval.

Editing Posting	Ranking Crite	ria	Click Save or N		move	Save	<< P	rev Next
Posting Details		an be used used by search com	to the next tal) .		ints based up		
Position Funding Infor		ucation factors. This optional to sented to the applicant.	r can be neipiar in laonaigi	ig the moot	- quannou canaldate	s in an applica	ant pool.	Ranking
Supplemental Questions		ng Criteria: Click on the button I		dialog box	will appear where yo	ou can add an	existing	g criterion b
Applicant Documents	0	the "Add" column or submit a r						
Search Committee		anking Criteria: To submit a new ative Criteria box opens, click o					dd a Crit	terion". Whe
	Included Evaluati	Cuitania						
Ranking Criteria	moladea Evaluati	ve Criteria						Add a Criter
Ranking Criteria Posting Documents	Category	Description		Weight	Workflow State	Status	_	Add a Criter
-			ersity	Weight	Workflow State Under Review by Dept/Committee	Status active	۵	Add a Criter
Posting Documents	Category	Description		Weight	Under Review by			Add a Criter

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

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

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

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

	selor (TLB10) (Draft) / Edit: Posting Documents	
Editing Posting	Posting Documents	Save << Prev Next >
Posting Details	To add a document to the posting, hover over the blu	ue Action text link to the right of the document name.
Position Funding Infor		cument or a document can be written or previously selected. Document types that are
Supplemental Questions	 supported as attachment include .doc, .docx, .pdf, .rt converted to .pdf for security. 	
Applicant Documents	PDF conversion must be completed for the documen	
Search Committee	Document Type Name Status (Actions)	Create New, or Choose Existing in order
Ranking Criteria	Marketing Plan Actions	to upload an attachment.
Posting Documents	Print Ad Text Upload New	
	Create New	0 0

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:

Posting	s / SPA / Employee Relations Counselor (TLB1	10) (Draft) / Summary		
		ns Counselor (TLB10) Created by: Linc Butter Owner: Linc Butter		Take Action On Posting • See how Posting looks to Applicant Print Preview (Applicant View) Print Preview
	Please review the details of the pos	ting carefully before continuing.		
		priate Workflow Action by hovering over the orange "Take Action on this bmit your posting, click on the Submit button on the popup box.	Posting" button. You may add a Comment to the posting and also add this post	ing to your Watch List. in the popup box that
		it link next to the Section Name in the Summary Section. This will take yo prections before moving to the next step in the workflow.	u directly to the Posting Page to Edit. If a section has an orange icon with an	exclamation point, you will need to review
	Posting Details Edit	Click "Edit" to make edit	s to a tab.	
	If the details below are incorrect	t, please make the appropriate Classification selection using the "Classifica	ation' Tab on the left side menu while modifying the Position.	
В	Blue Circle Check Human Resources Specialist Itage Ita			
	Classification Type	SPA		
	Salary Range	\$29,709 - \$58,108		

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

Position Funding Informa	ation Edit	Click "Edit" to make edits to a tab.	
Budget Advisory Approval	•		J
Orange Circle Exclamation Point		ons that are funded in whole or in part by general state fur nittee's review process, state below what mission specific	
Mission Specific, Essentia and/or Key Objectives not M without position			

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

North Carolina		Inbox	PeopleAdmin
A&T STATE UNIVERSITY	Home Postings Hiring Proposals My Profile	Watch List Help Linc Butler, you have 0 messages. Supervisor	APPLICANT TRACKING
Postings / SPA / Employee Relations Counselor (TLB10) (Draft Posting: Employee Relations Courselor (SPA) Edit Current Status: Draft Position Type: SPA Created Section/Unit: VC for Human Owner: Resources Summary History Settings Hiring	Click on "Take Action On Pending Request", then select "Send to Department Head" to move the request to the next step in the approval workflow.	Take Action On Posting • WORKFLOW ACTIONS Keep working on this Posting Canceled (move to Canceled Send to Department Head (m Department Head)	l)
	retully before continuing. Vorkflow Action by hovering over the orange "Take Action on thi st. in the popup box that appears. When you are ready to submit		

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



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

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

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

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

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

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

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

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

		Home	Postings	Hiring Proposals	My Profile	Help		
						Linc Butler, you have 0 messages.	Supervisor	💌 C logout
Postings	/ EPA / Employee Relations Counsel	or (TLB10) (Draft) / Summary						
	Posting: Employee Re (EPA) Edit Current Status: Draft Position Type: EPA Section/Unit: VC for Human Resources	ations Counselor (T Created by: Linc Butler Owner: Linc Butler	LB10)				ons on this Posting /e to Canceled) tment Head (move to	
	Summary History Settin			osition Description				
	Please review the details of t	he posting carefully before co	ontinuing.					

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

5) Click "Submit"



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

Create New SHRA Posting - Create from Position Description

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

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

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



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

NORTH CAROLINA A&T STATE UNIVERSITY								ICANT TRACKIN
stings / SPA / Create from Position E SPA Position Descript			Home Postings	Hiring Proposals My Profile He	Active user Supervisor.	type is	Supervisor	• 0
	Search: 1010 mn: Add Column VC for Human Resources ent:	Search	Hide search options	position at	re customizabl tributes and ca	-		
First Nar				saved for l	ater use.	[Action	
List of curr SHRA post	rent / pendir ings by activ r type. sition Descriptions" (31 Item	/e s Found)		Previous 1 2 Next -		Superior	down i	menu
List of curr SHRA post	rent / pendir tings by activ trype. soliton Descriptions" (31 ltem Position Number	S Found) Employee First Name	Employee Last Name	Previous ↑ (2) Next→ PositionClessification Title	Department	Supervisor Avail V-Annue Descurses (Inc. Robot)	down i status	menu
List of curr SHRA post ved search: "SPA Po ved search: "SPA Po Writing Position Title Administrative Support Spec	rent / pendir tings by activ trype. Soliton Descriptions" (31 liter Position Number 00015	/e s Found) Employee First Name Belinda	Employee Last Name Macklin	Previous 1 2 Next	Department HR Systems	Asst VC-Human Resources (Linc Butler)	down r Status Active	-
List of curr SHRA post	rent / pendir tings by activ trype. soliton Descriptions" (31 ltem Position Number	S Found) Employee First Name	Employee Last Name	Previous ↑ (2) Next→ PositionClessification Title	Department	•	down i status	Menu (Actions Actions
List of curr SHRA post ved Search: "SPA Po ved Search: "SPA Po ved Search and the search working Postion Tite Administrative Support Spic Hamar Resources Spotalist Hamar Resources Consultat	rent / pendir tings by activ rtype. sition Descriptions" (31 Item Position Number 000025 00023	/e s Found) Employee First Name Beinda Eler Namta	Employee Last Name Macklin Jones Cole	Previous 1 2 Next→ PositionClassification Title Administrate Support Special Human Resource Specialist Human Resource Consultant	Department HR Systems Benefis Benefis	Asst VC-Human Resources (Linc Butler) Human Resources Consultant (Nanita Cole) Asst VC-Human Resources (Linc Butler)	down r Status Active Active Active	(Actions Actions Actions
List of curr SHRA post ved search: "SPA Po ved search: "SPA Po Working Postilion Title Automitiative Supportings: Human Resources Special	rent / pendir tings by activ rype. position bescriptions" (31 Rem Position Number 000016 000025 000033 LC0040	/e s Found) Employee First Name Beinda Ester Natala Lonnie	Employee Last Name Mackin Jones Cole Crotts	Previous 1 2 Next	Department HR Systems Benefits Benefits Recruitment and Retention	Asst VC-Human Resources (Linc Butler) Human Resources Consultant (Nanita Cole) Asst VC-Human Resources (Linc Butler) Asst VC-Human Resources (Linc Butler)	Status Active Active	(Actions Actions Actions Actions
List of curr SHRA post Ved Search: "SPA Po Ved	rent / pendir tings by activ rtype. sition Descriptions" (31 Item Position Number 000025 00023	/e s Found) Employee First Name Beinda Eler Namta	Employee Last Name Macklin Jones Cole	Previous 1 2 Next Position/Classification Title Administrative Support Spec Human Resources Spoulant Human Resources Consultant Human Resources Consultant	Department HR Systems Benefis Benefis	Asst VC-Human Resources (Linc Butler) Human Resources Consultant (Nanita Cole) Asst VC-Human Resources (Linc Butler)	Status Active Active Active Active	(Actions Actions Actions

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



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

Create New Posting button to begin updating posting information:

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

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

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

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

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

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

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

Editing Posting	Posting Details			Save and Next buttons.	Save	ext >>
Posting Details	Scheck spelling					
Position Funding Infor	To create a Posting, first con	nplete the information on this screen, then click the Nex	xt button or select the page in the lef	t hand navigation menu. Proceed through all sections completing al	I necessary information. To submit t	he
 Supplemental Questions Applicant Documents 	Posting to Human Resources	s, you must go to the Posting Summary Page by click er your mouse over the orange Action button for a list of	ing on the Next button until you read	ch the Posting Summary Page or select Posting Summary Page from	n the left navigation menu. Once a	
 Applicant Documents Search Committee 	* Required Information					
 Ranking Criteria 	Classification Information					
 Posting Documents 		prrect, please make the appropriate Classification se	election using the "Classification"	Tab on the left side menu while modifying the Position		
Summary	Position/Classification Title	Human Resources Specialist	Ei/	elds from the approved posi	tion descriptio	<u>n I</u>
	Job Code	11804			•	"
	Classification Type	will be copied in to your new posting.				
	Salary Range	\$29,709 - \$58,106				
	Hiring Range					
	Contributing Reference	\$36.304		Enter a hiring range if desir	ed.	
	Rate					
	Journey Market Rate	\$46,107	_			
	Advanced Reference Rate	\$52,101				
	Minimum Experience/Education	Bachelor's degree; or an equivalent combination of training and ex All degrees must be received from appropriately accredited instituti	perience. ions.	Enter preferred years of ex	perience, skills	,
	Preferred Years Experience, Skills,	Test	*	training and education.		
	Training, Education		×		Duc file	٦
	Competency Profile	http://www.osp.state.nc.us/Guide/CompWebSite/Profiles/HR%	%20Specialist%20Profile.pdf	Click to view Compete	ency Profile.	
Prima	Position ary Function of nizational Unit	Test	and Related	erview and Key Responsibili <u>Competencies</u> : Continue to g information into any emp eded.)	
[time] to	k Hours: From o [time] on [days of week]	M-f 8-5pm]		
Key Resp	onsibilities and F	Related Competencies				
Requir	ed Competency	Applied Knowledge - HR Pro	ogram and Organiza	ation		
D	escription	Performs X, Y, and Z.				
Requir	ed Competency	Customer Service				
D	escription	Performs A, B, and C.				
Requir	ed Competency	Communication - Verbal/Wr	itten			
D	escription	Performs H.				

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

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

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

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

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

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

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

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

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

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

1) FTVORGN- Provides a list of Org Codes

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

3) FTVACCT- Provides a list of Accounts

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

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

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

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

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

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

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

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

-	gory: Any	Keyword:		Filter supplemental questions by keyword or category.
Add	Category	Question		.,,
	Uncategorized	How did you hear about this employment opp	ortunity?	
	Experience	Do you have at least one year of responsible experience?	payroll or financial and stati	stical record keeping
	Education	Do you have a high school diploma or equiva	lent?	
	Experience	Do you have HR experience?		
	Education	Do you have a High School diploma?		V
	Education	Do you have a Master's Degree?		
	Education	Do you have a Master's Degree?		1
	Experience	How many years of Accounting experience de	o you have in a higher educa	ation setting?
	Education	Do you have a High School diploma?	Click to submit a cus	stom supplemental
	Experience	Do you have at least 4 years of experience?	question for review	and approval.
Click ch	aying all 10 leck box to ac g supplement		ubmit when	u want? Add a new one

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

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

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

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

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

stings / SPA / Employee Relations Cou	nselor (TLB10) (E	Draft) / Edit: Applicant Documents			
Editing Posting	Click Included to make uploading a document optional.			Click <u>both</u> Included <u>and</u> Required t make uploading a document requi	xt >>
Posting Details	•	to make the document(s) mar	roc		
Position Funding Infor				+	
Supplemental Questions	Order	Name	Included?	Required?	
Applicant Documents	1	Resume			
Search Committee					
Ranking Criteria	2	Cover Letter			
Posting Documents					
Summary	3	Curriculum Vitae			
	4	Teaching Philosophy			
	5	Letter Of Reference 1			
	6	Letter Of Reference 2			
	7	Letter Of Reference 3			

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

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

In the **Search Committee** tab, you can assign search committee members who will have access to review application information for a specific posting. Search committee members can view applications, applicant documents, and evaluate / rank applicants based upon ranking criteria you establish as part of the posting. Requests to add search committee members will be reviewed and approved by the Division of human Resources (DHR) once the posting request is routed to DHR for approval. Upon DHR approving a search²⁵

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

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

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

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

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

New Search Committee Member		
Request that someone be granted access to the syste	m for the purpose of serving as a Search Committee Member.	
Required fields are indicated with an asterisk (*).		
Account Information		
Please enter the following information to create an	account for a new Search Committee Member	1
* First Name		
* Last Name	To create an account for a new	
* Email	search committee member, complete	
* Username	the fields and click submit.	100
Submit		126

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:

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

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

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

Editing Posting	Ranking Criteria	Save <> Prev	Next >
Posting Details		mmittees during the applicant review process to rank applicants based upon job-related	
Position Funding Infor	 experience and education factors. This optional criteria are not presented to the applicant. 	ool can be helpful in identifying the most qualified candidates in an applicant pool. Rank	ing
Supplemental Questions	Adding New Ranking Criteria: Click on the button labeled "Add a Criterion". A dialog box will appear where you can add an existing criterion by		
Applicant Documents	checking the box in the "Add" column or submit a new one for approval. Submitting New Ranking Criteria: To submit a new ranking criterion for review and approval, click on the button labeled "Add a Criterion". When		
Search Committee	 Submitting New Ranking Criteria: To submit a new the Available Evaluative Criteria box opens, click 		. When
Ranking Criteria	Included Evaluative Criteria	Click to add ranking criteria.	Criterio
Posting Documents	Category Description	Click to add falking criteria. Status	
Summary			

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:

_	ory: Any ▼ Category	Keyword: Description			Search for rank keyword or cat	-
	on alogon 200	Rank Experience - 5 is the Possible Answers: 1. 1 2. 2 3. 3 4. 4 5. 5 Applicant workflow stat	Indicate the app that allows an a	pplicant to		ar •S to •
	0	Please rate the candidate Teaching experience in a			ıbmit a custom r for review and ap	-

Editing Posting	Ranking Criter	ria	Click Save or Nex	kt to move	Save	< Prev Ne:
Posting Details		n be used used by search com	to the next tab.		licants based up	
Position Funding Infor		acation factors. This optional to ented to the applicant.	ar can be neipiar in identifying a	ie most quamea canald	ates in an applic	ant pool. Ranking
Supplemental Questions		ng Criteria: Click on the button I		og box will appear when	e you can add ar	existing criterion
Applicant Documents	U U	the "Add" column or submit a r nking Criteria: To submit a new		approval, click on the l	outton labeled "A	dd a Criterion" W
Search Committee		ative Criteria box opens, click o				
Ranking Criteria	Included Evaluativ	ve Criteria				Add a Crit
Posting Documents	Category	Description		Weight Workflow State	Status	
Summan (Uncategorized	Teaching experience in a univ	ersity	Under Review by Dept/Committee	active	8
Summary						
Summary	Uncategorized	Please rate the candidates ex	perience related to the job:	Under Review by Dept/Committee	active	8

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

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

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

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

ings / SPA / Employee Relations Cour	selor (TLB10) (Draft) / Edit: Posting Documents	
Editing Posting	Posting Documents	Save << Prev Next >
Posting Details	To add a document to the posting, hover over the blue	Action text link to the right of the document name.
Position Funding Infor	Documents can be uploaded by browsing for the docur	ment or a document can be written or previously selected. Document types that are
Supplemental Questions	 supported as attachment include .doc, .docx, .pdf, .rtf, converted to .pdf for security. 	
Applicant Documents	PDF conversion must be completed for the document t	Click "Actions", then select Upload New,
Search Committee	Document Type Name Status (Actions)	Create New, or Choose Existing in order
	Marketing Plan Actions	to upload an attachment.
Ranking Criteria		
Ranking Criteria Posting Documents	Print Ad Text Upload New Create New	

Create New SHRA Posting from a Position Description – Summary Tab

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

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

Posting	s / SPA / Employee Relations Counselor (TLB1	10) (Draft) / Summary		
		ns Counselor (TLB10) Created by: Linc Butter Owner: Linc Butter Himg Proposals Associated Position Description		Take Action On Posting v See how Posting looks to Applicant Print Preview (Applicant View) Print Preview
	appears. When you are ready to su To edit the posting, click on the Edit	priate Workflow Action by hovering over the orange "Take Action on this bmit your posting, click on the Submit button on the popup box.	Posting" button. You may add a Comment to the posting and also add this post ou directly to the Posting Page to Edit. If a section has an orange icon with an	
	Posting Details Edit Classification Information If the details below are incorrect	Click "Edit" to make edit		
В	lue Circle Check	Human Resources Specialist 11804		
	Classification Type	SPA		
	Salary Range	\$29,700 - \$58,108		

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

Position Funding Informa	ation <u>Edit</u>	Click "Edit" to make edits to a tab.	
		ons that are funded in whole or in part by general state fur mittee's review process, state below what mission specific	
Mission Specific, Essentia and/or Key Objectives not N without position			

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

NORTH CAROLINA AAT STATE UNIVERSITY		(nbox) PeopleAdmin
	Home Postings Hiring Proposals My Profile	Watch List APPLICANT TRACKING Help Linc Butler, you have 0 messages. Supervisor
Postings / SPA / Employee Relations Counselor (TLB10) (Draft Posting: Employee Relations Co (SPA) Edit Current Status: Draft Position Type: SPA Created Section/Unit: VC for Human Owner: Summary History Settings Diagram Settings Hiring	Click on "Take Action On Pending Request", then select "Send to Department Head" to move the request to the next step in the approval workflow.	Take Action On Posting WORKFLOW ACTIONS Keep working on this Posting Canceled (move to Canceled) Send to Department Head (move to Department Head)
	Vorkflow Action by hovering over the orange "Take Action on thi st. in the popup box that appears. When you are ready to submit	

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

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

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

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

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

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

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

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

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

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

ostings	s / EPA / Employee Relations Counselo	or (TLB10) (Draft) / Summary					
	Posting: Employee Rel (EPA) Edit Current Status: Draft Position Type: EPA Section/Unit: VC for Human Resources	Created by: Linc Butler Owner: Linc Butler	ĽB10)		Canceled (mo	rions on this Posting we to Canceled) rtment Head (move to	
	Summary History Settin	gs Hiring Proposals	Associated Po	osition Description			

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

5) Click "Submit"



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

Create New EHRA Posting

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

A&T STATE UNIVERSITY					Wa		PeopleAdmin APPLICANT TRACKI
		Postings Hiring Proposals	My Profile	Неір			
lover curser over Destings		SPA EPA		Linc Butler, you	have 0 messages.	Supervisor	•
lover cursor over Postings ab and click on EHRA.		Post Doctoral					
	and Desition M	Anno mant Civatara					
					Shortcuts		
Welcome to your Online Recruitment a	0	or click on Create I	-		Shortcuts Create New SPA Create New EPA		
Welcome to your Online Recruitment	O		-		Create New SPA	A Posting	ting

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:

	NORTH CARVE INA AGT STATE UNIVERSITY		Home Postings Hiring Proposals My Profile Help		W	Inbox PeopleAdmin atch List APPLICANT TRACKING T
Postings J EPA	/ EPA A Postings		Home Postings Hiring Proposals My Profile Help	Active user type Supervisor.	e is	Supervisor C logo
	Con Saved Search V Search Add Column Add Column Worker Search Content Worker Search Content Part Vice Chancelor DeartVice Chancelo		Searches are	customizable by butes and can be er use.		
Ad ho						Actions
	Position Title	Posting Number	Department	Active Applications	Workflow State	(Actions)
	Director of Federal Policy Compliance		VC for Human Resources	0	Draft	Actions
	Asst VC-Human Resources		VC for Human Resources	0	Draft	Actions
	Asst VC-Human Resources		VC for Human Resources	0	Draft	Actions •
	Asst VC-Human Resources		VC for Human Resources	D	Draft	Actions
	Asst VC-Human Resources - LC		VC for Human Resources	D	Posted	Actions
	Director-Employee Rel. AA		Employee Relations	0	Draft	Actionsv
	Administrative Support Assoc - LC		Classification & Compensation	0	Closed	Actions •
	Administrative Support Assoc - LC		Classification & Compensation	0	Draft	Actions

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

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

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



Create New EHRA Posting – Create from Posting

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

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

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

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

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

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

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



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

Create New Posting button to begin updating posting information:

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

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

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

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

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

Tab list	Home	Postings Hiring Proposals My Pr	rofile Help	
			Linc Butler, you have 0 messages. Superv	visor 🔽 C logout
Postings / EA / Assistant Director for HR	Systems (Draft) / Edit: Posting Details			
		_		
Editing Posting	Posting Details	S	Save and Next buttons.	Save Next >>
Posting Details	♥ Check spelling ▼			
Position Funding Infor				
Supplemental Questions			click the Next button or select the page in the le submit the Posting to the next approval step, yo	
Applicant Documents			ting Summary Page or select Posting Summary ver the orange Action button for a list of possible	
References/Letters of	* Required Information	ninaly page appears, noter year mease e		
Search Committee	Classification Information			
Ranking Criteria	HELP TEXT: If the details	below are incorrect, please make the ap	propriate Classification selection using the "(Classification' Tab on the
Posting Documents	left side menu while modif			
Summary	Position/Classification Title	Assistant Director		
	Job Code	82229		
Blue Check Circle	Classification Type	EPA		
	* Salany Danga		This field is required.	fields are in <u>RED</u> .
	* Salary Range	Enter salary to be advertised amount or a desc	ription such as "commensurate with education and exp	perience" 136

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

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

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

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

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

Posting Detail Information			Supervisor and / or
* Supervisor	Select Some Options Th	is field is required.	Applicant Reviewer
* Applicant Reviewer	Select Some Options Th	is field is required.	access to the posting.
Posting Number			the posting.
* Open Date	This field is required.		
Date desired for closing or initial review (minimum 30 days).		Minimum allowak period is thirty (30) calendar
Close Date		days. Posting can until filled.	also be open
Open Until Filled	No 🖌	until med.	
 Special Instructions to Applicant 		✓ This field	is required.
* Fast Find Information	Please select This field is required	Select the most Find category fo	

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

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

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

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

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

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

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

1) FTVORGN- Provides a list of Org Codes

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

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

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

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

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

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

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

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

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

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

	Add a	Question					×	
L	Available Supplemental Questions							
l		gory: Any Category	 Keyword Question 	I:			Filter supplemental quest by keyword or category.	tions
	Add		How did you hear	about this emplo	ovment opp	ortunity?		
s		Experience				payroll or financial and st	atistical record keeping	
		Education	Do you have a hig	gh school diploma	a or equival	ent?		
		Experience	Do you have HR experience?					
		Education	Do you have a Hig	gh School diplom	ia?		V	
		Education	Do you have a Ma	aster's Degree?				
		Education	Do you have a Ma	aster's Degree?				
		Experience	How many years	of Accounting ex	perience do	you have in a higher ed	ucation setting?	
		Education	Do you have a Hig	gh School diplom	ia?	Click to submit a c	ustom supplemental	
		Experience	Do you have at le	ast 4 years of ex	perience?	question for revie		
	Dipl	aying all 10		_		0.115.14		
C	ick ch	neck box to a	dd an			Can't find the one	you want? Add a new one	
e	kisting	g supplement	al question.		Click Su finishe	ubmit when d.	Submit Cancel	
		0111011 1101	000000			I COLON	14	

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

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

osition	Required	Category	Question			Status	
osition		Uncategorized		s employment opportunity?		active	×
2		Experience	Do you have at least one y keeping experience?	ear of responsible payroll or financial and	statistical record	active	Ø
•		Education	Do you have a High Scho		٦	active	
		Experience	How many years of Accor	Assign points to answers.	ucation setting?	active	C
			Possible Answers: Predefi	ned Options	Disqualifying		
	click to ma required.	ake questions	1. 0 years 2. 1-3 years				
			3. 4-5 years 4. 5+ years				
eorde	r question	s.		Click to assign disqualifying	answors		

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

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

diting Posting		ncluded to make ding a document o	optional.	Click <u>both</u> Included <u>and</u> Required t make uploading a document requi	
Posting Details	Included to make the document(s) mandatory to cappe			cesses and the second sec	
Position Funding Infor					
Supplemental Questions	Order	Name	Included?	Required?	
Applicant Documents	1	Resume			
References/Letters of					
Search Committee	2	Cover Letter			
Ranking Criteria					
Posting Documents	3	Curriculum Vitae			
Summary	4	Teaching Philosophy			
	5	Letter Of Reference 1			
	6	Letter Of Reference 2			
	7	Letter Of Reference 3			

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

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

stings / EPA / Assistant Director for HR	Systems (Draft) / Edit: References/Letters of Recommendation
Editing Posting	References/Letters of Recommendation
Posting Details	The check spelling
Position Funding Infor	
Supplemental Questions	Accept References: Please indicate whether or not you wish to require applicants to submit references with their application.
Applicant Documents	Minimum Requests: Please indicate the minimum number of references you would like applicants to submit.
References/Letters of	Maximum Requests: Please indicate the maximum number of references you would like applicants to submit.
Search Committee	Cutoff Date: Please indicate the date by which reference information must be submitted.
Ranking Criteria	* Required Information
Posting Documents	References/Letters of Recommendation
Summary	Accept References No 💌 Indicate Yes or No.
Reference	Minimum Requests
	Maximum Requests Recommended range is 3 to 5.
nformation may	Cutoff Date
ot be submitted	
fter this date.	Save << Prev Next

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

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

In the **Search Committee** tab, you can assign search committee members who will have access to review application information for a specific posting. Search committee members can view applications, applicant documents, and evaluate / rank applicants based upon ranking criteria you establish as part of the posting. Requests to add search committee members will be reviewed and approved by the Division of human Resources (DHR) once the posting request is routed to DHR for approval. Upon DHR approving a search committee member's access, the search committee member will receive an e-mail notification with instructions on how to access the online posting and related application information:

Editing Posting	Search Committee		Save << Prev Next >			
Posting Details	Search Committees are advisery in pature	and convertion purpose of recruiting a qualified applicant pool, reviewin	a their crodentials, and			
Position Funding Infor	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					
Supplemental Questions	to the hiring unit, as well as individuals external to the University who represent key stakeholders.					
Applicant Documents	Search Committee Members					
References/Letters of	No Search Committee Members have been assigned to this Posting yet.					
Search Committee	Search					
Ranking Criteria	Search					
Posting Documents	Find a User to assign as a Search Committ	Find a User to assign as a Search Committee Member.				
Summary						
	First Name					
	Last Name	To search for a pre-approved search				
	Email Address	committee member, enter the name a	nd			
	Search	click the Search button.				

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

Search	Click the check box to assign the search committee member as the committee chair.
Find a User to assign as a Searc	h Committee Mem <mark>e</mark> r.
Name Email Address	Add Member
Lonnie Crotts emailaddress@zed.ze	d Add Member 🔲 Make Member The Committee Chair
First Name Lonnie	
ast Name Crotts	Click the Add Member button to add the search committee member you
Email Address	searched for.

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

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

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

Ma	atching User		
Username	ambraun		
First Name	Amy		
Last Name	Braun	Click the Add User button to add the new	
Email	emailaddress@zed.zed		
Preferred Grou	Jp Employee	search committee member in a pending	
Add User		status. Access will be reviewed and approved by DHR.	
Clear Matching	Users		
New Search	Committee Member		
Request that son	neone be granted access to th	e system for the purpose of serving as a Search Committee Memb	ber.
Required fields a	re indicated with an asterisk (*).	
Account Inform	nation		
Please enter the	e following information to cre	ate an account for a new Search Committee Member.	
* First Nar	ne Amy		
* Last Nan	ne Braun		
* Email	ambraun@ncat.edu		
* Usernan	ne ambraun		
Submit			
			Save << Prev Next >>
Create New EHRA Posting from an Existing Posting – Ranking Criteria Tab

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

Editing Posting	Ranking Crit	teria		(Save << Prev Next
 Posting Details Position Funding Infor 	experience and		mittees during the applicant review process to ol can be helpful in identifying the most qualifie		
Supplemental Questions	Adding New Rar		abeled "Add a Criterion". A dialog box will app	ear where you can a	add an existing criterion by
Applicant Documents	0		ranking criterion for review and approval, clic	k on the butten label	lad "Add a Critarian" M/br
References/Letters of			on the "Add a new one" link in the bottom right		Add a Chienon . Whe
Search Committee	Included Evalua	ative Criteria			Add a Criteri
Ranking Criteria	Category	Description	Click to add ranki	ng criteria.	Status
Posting Documents	7			,	J
Summary				l	Save << Prev Next

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

Add a Ranking Criterion Available Evaluative Criteria		*
Category: Any V Keyword: Add Category Description		Search for ranking criteria by keyword or category.
	Indicate the applicant wor that allows an applicant to	
Uncategorized Please rate the candidates ex Uncategorized Teaching experience in a unit Diplaying all 3 Click check box to add an	versity Click to s	ubmit a custom ranking for review and approval. one you want? Add a new one
existing ranking criterion.	Click Submit when finished.	Submit Cancel

Editing Posting	Ranking Crite	ria	Click Save or Next to	move	Save	<< P1	rev Next >
Posting Details		n be used used by search com	to the next tab.		s based up		
Position Funding Infor		ucation factors. This optional to sented to the applicant.	real be helpful in fuentitying the most of	aamea canadates ii	n an applica	ant pool.	Ranking
Supplemental Questions			abeled "Add a Criterion". A dialog box w	ill appear where you	can add an	existing	criterion by
Applicant Documents	0	the "Add" column or submit a n					
References/Letters of			ranking criterion for review and approva n the "Add a new one" link in the bottom		labeled A	dd a Crit	erion". vvne
Search Committee	Included Evaluation	ve Criteria					Add a Criterio
Ranking Criteria	Category	Description	Weight	Workflow State	Status		
Posting Documents	Uncategorized	Teaching experience in a univ	versity	Under Review by HR	active	8	
	Uncategorized	Please rate the candidates ex	perience related to the job:	Under Review by HR	active	•	
Summary	Uncategorized	Rank Experience - 5 is the hig	jhest	Under Review by HR	active	8	

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

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

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

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

	Home Postings Hiring Proposals My Profile Help	
	Linc Butler, you have 0 messages. Supervisor	logou
Postings / EPA / Assistant Director for HR	Systems (Draft) / Edit: Posting Documents	
Editing Posting	Posting Documents Save <->	
Posting Details	To add a document to the posting, hover over the blue Action text link to the right of the document name.	_
Position Funding Infor	Documents can be uploaded by browsing for the document or a document can be written or previously selected. Document types that are	
Supplemental Questions	supported as attachment include .doc, .docx, .pdf, .rtf, .rt	
Applicant Documents	PDE conversion must be completed for the document to	
References/Letters of	Document Type Name Status (Actions) Create New, or Choose Existing in order	
Search Committee	Marketing Plan Actions	
Ranking Criteria	Print Ad Text Upload New	
Posting Documents	Create New Choose Existing Complete this page by clicking Save <pre>Save</pre>	
Summary	on Save and Next>	-

Create New EHRA Posting from an Existing Posting – Summary Tab

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

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

Posting	s / EPA / Assistant Director for HR Systems (E	Draft) / Summary		
		r for HR Systems (EPA) Created by: Linc Butter Owner: Linc Butter Hiring Proposals Associated Position Description		Take Action On Posting • See how Posting looks to Applicant Print Preview (Applicant View) Print Preview
	Summary County County			
	Please review the details of the pos	sting carefully before continuing.		
		ang carolary soloro continuing.		
		priate Workflow Action by hovering over the orange "Take Action on thi g. click on the Submit button on the popup box.	s Posting" button. You may add a Comment to the posting and also add this posting to your Watel	h List. in the popup box that appears. When
			you directly to the Posting Page to Edit. If a section has an orange icon with an exclamation point	, you will need to review this section and
		moving to the next step in the workflow.		
	Posting Details Edit			
		Click "Edit" to make e	edits to a tab.	
	Classification Information			
	HELP TEXT: If the details below	w are incorrect, plet	de menu while modifying the Position.	
	ue Circle Check	Assistant Director		
	ue circle check	82229		
	Classification Type	EPA		
	Salary Range	\$55,000 - \$60,000		
	Minimum Experience/Education			

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

Position Funding Informat	tion <u>Edit</u>	Click "Edit" to make edits to a tab.	
		ons that are funded in whole or in part by general state fur nittee's review process, state below what mission specific	
Mission Specific, Essentia and/or Key Objectives not M without position			

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

NORTH CAROLINA A&T STATE UNIVERSITY		Inbox PeopleAdmin Watch List APPLICANT TRACKING
	Home Postings Hiring Proposals My Pro	
		Linc Butler, you have 0 messages. Supervisor 💽 C logout
Postings / EPA / Assistant Director for HR Systems (Draft) / Summary Posting: Assistant Director for HR Systems (Draft) / Summary Posting: Assistant Director for HR Systems (Draft) / Summary Posting: Assistant Director for HR Systems (Draft) / Summary Posting: Assistant Director for HR Systems (Draft) / Summary Summary History Settings Hiring	Click on "Take Action On Pending Request", then make appropriat selection to move the request to the next step in the approval workflow.	e Canceled (move to Canceled)
		n this Posting" button. You may add a Comment to the posting mit your posting, click on the Submit button on the popup

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



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

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

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

Posting was successfully transitioned							8
North Carolina A&T State University					Watch List	APPLICANT TRACKING	3 7
	Home Postings H	iring Proposals	My Profile	Help			
Green confirmation bar indic	ating the Donding	,		Linc Butler, you have 0 messa	es. Superviso	or C	logout
	•	5					
Request was successfully trar	nsitioned and						
added to your Watch List.							
Current Status: Department Head				📩 See how	Posting looks to	Applicant	

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

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

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

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

Home Postings Hiring Proposals My Profile Help Linc Butter, you have 0 messages. Supervisor © log Postings / EPA / Assistant Director for HR Systems (Draft) / Summary Posting: Assistant Director for HR Systems (EPA) Edit VORKELOW ACTIONS Current Status: Draft Position Type: EPA Section/Unit: VC for Human Owner: Linc Butter Owner: Linc Butter Owner: Linc Butter Owner: Linc Butter Owner: Linc Butter	4	NORTH CAROLINA A&T STATE UNIVERSITY						(nbox) Watch List	PeopleAdmin APPLICANT TRACKING	
Postings / EPA / Assistant Director for HR Systems (Draft) / Summary Posting: Assistant Director for HR Systems (EPA) Edit Current Status: Draft Position Type: EPA Section/Unit: VC for Human Created by: Linc Butler Owner: Linc Butler Owner: Linc Butler Owner: Linc Butler				Home	Postings	Hiring Proposals	My Profile	Help		
Posting: Assistant Director for HR Systems (EPA) Take Action On Posting • Edit WORKFLOW ACTIONS Current Status: Draft Keep working on this Posting Position Type: EPA Created by: Linc Butler Section/Unit: VC for Human Owner: Linc Butler								Linc Butler, you have 0 messages. Supervis	or 🔽 C log	out
Summary History Settings Hiring Proposals Associated Position Description	Posting	Posting: Assista Edit Current Status: Draft Position Type: EPA Section/Unit: VC for Human Resources	nt Director for Create N Owner	HR Systems				WORKFLOW ACTIONS Keep working on this Posti Canceled (move to Cancel Send to Department Head	ed)	

- 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:

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

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

NORTH CAROLINA ALE STATE UNIVERSITY		_	Home Postings	Hiring Proposals My Profile	Active use Supervisor	r type is	(Inbox) Peopl atch List) APPL/	CANT TRACKING
	Search: Id Column: Add Column VC for Human Resource epartment:		Search Hide search options'	positio	es are custo n attributes or later use.	and can be	Action	s drop
List of curre	nt / pending	EHKA					down	monu
position des type: arch ed Search: "El	EPA Position Descrip PA Position Descriptions" (active user ations (7 Items Found)				l		menu.
position des type: arch working Position Title	EPA Position Descrip PA Position Descriptions" (Position Number	active user tions (7 Items Found) Employee First Name	Employee Last Name	Position/Classification Title	Department	Supervisor	Status	(Actions)
working Position Title Asst VC-Human Resources	EPA Position Descriptions" (Position Descriptions" (Position Number 000127	Active user	Butler	Asst VC-Human Resources	VC for Human Resources	VC for Human Resources (Linda McAbee)	Status Active	(Actions) Actions •
vorking Position Title	EPA Position Descrip PA Position Descriptions" (Position Number	active user tions (7 Items Found) Employee First Name				•	Status	(Actions)

Once you locate the position description you wish to create from, you can select it by moving your cursor over that position description's corresponding $\boxed{\text{Actions } \mathbf{v}}$ drop down menu located in the far right columns and clicking on **Create From**. This drop down menu will also give you the option of **View** if you wish to

view the information associated with a particular position description prior to selecting Create From:



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

Create New Posting button to begin updating posting information:

Posting / EPA / New Posting		Home Postings Hiring Proposals My Pro	ofile Help	
New Posting * Required information Position Title Assistant Director for HR Systems Organizational Unit Division/School/College * VC for Human Resources Department * VC for Human Resources				Linc Butler, you have 0 messages. Supervisor 💌 C logou
* Required Information Position Title Assistant Director for HR Systems Organizational Unit Division/School/College * VC for Human Resources Department * VC for Human Resources VC for Human Resources	Postings / EPA / New Posting			
Organizational Unit Division/School/College * VC for Human Resources Department * VC for Human Resources				Create New Posting Cancel
Division/School/College * VC for Human Resources Confirm Organizational Unit information.	Position Title	Assistant Director for HR Systems		
Department * VC for Human Resources information.	Organizational Unit			-
VC for Human Resources	Division/School/College *	VC for Human Resources		-
	Department *	VC for Human Resources	inform	nation.
section/unit VC for Human Resources	Section/Unit *	VC for Human Resources		
Online Applications				
© Accept online applications? Special offline application instructions		Inc	lude special	
offline application Create new instructions if posting button		inst	tructions if	Create new posting button.
necessary.			,cssai y.	Create New Posting Cancel

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

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

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

Tab list	Home Pos	stings Hiring Proposals	My Profile	Help		
				Linc Butler, you have 0 messages.	Supervisor	🔻 C log
tings / PA / Assistant Director for HR	Systems (Draft) / Edit: Posting Details					
+						
Editing Posting	Posting Details		Sav	e and Next button	Save	e Next >>
Posting Details	All Check analling		541		5.	
Position Funding Infor	Check spelling					
Supplemental Questions	Proceed through all sections co	ompleting all necessary informa	tion. To submi	the Next button or select the page t the Posting to the next approval	step, you must go to th	he Posting
Applicant Documents				ummary Page or select Posting S e orange Action button for a list o		
References/Letters of	* Required Information					F -F
Search Committee	Classification Information					
Ranking Criteria	HELP TEXT: If the details be	low are incorrect, please mak	e the appropr	iate Classification selection usi	ng the "Classification"	' Tab on the
Posting Documents	left side menu while modifying				ng the blassmeaton	
Summary	Position/Classification A Title	Assistant Director				
	Job Code 8	32229				
Blue Check Circle	Classification Type E	EPA		Г	Required Fie	
	* Salary Range			s field is required. such as "commensurate with education	-	

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

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

Postings / EPA / Assistant Director for HR	Systems (Draft) / Edit: Posting Details			
Editing Posting	Posting Details		Save and Next buttons	Save Next >>
Posting Details	MC Chock apolling			
Position Funding Infor	[₩] <u>Check spelling</u> ▼			
Supplemental Questions			then click the Next button or select the page To submit the Posting to the next approval	
Applicant Documents			Posting Summary Page or select Posting S se over the orange Action button for a list o	
References/Letters of	* Required Information			·
Search Committee	Classification Information			
Ranking Criteria	HELP TEXT. If the details be	elow are incorrect please make th	e appropriate Classification selection usi	ng the "Classification' Tab on the
Posting Documents	left side menu while modifyir			
Summary	Position/Classification Title	Assistant Director	Fields from the approve	•
	Job Code	82229	will be copied in to you	new posting.
	Classification Type	EPA		
		Enter salary to be advertised amount or a	This field is required. description such as "commensurate with educati	Enter a hiring range if desired.
	Minimum Experience/Education		•	

Р	osition Overview		
	Primary Purpose of	Test	
	Position		Position Overview and Position Information:
	Primary Function of Organizational Unit	Test	Continue to enter posting information into any empty fields as needed.
P	osition Information		
*	Position Title	Assistant Director for HR Systems	
*	Working Title		This field is required.
	Position Number	TLB30	
*	JCAT	12345	
	Approved Salary	\$60,000	
*	FLSA	Exempt	
*	Appointment Type	Permanent - Full-time	
*	Tenure Track	Please select This field is required.	
	FTE		
*	If Time Limited, Appointment Length	If time limited, please indicate budget end date. If t left blank if the "Time Limited" field above is check	funded from more than one fund, indicate earliest end date. This field cannot be ed selected."

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

Po	sting Detail Information		Supervisor and / or
*	Supervisor	Select Some Options This field is required	Applicant Reviewer
*	Applicant Reviewer	Select Some Options This field is required	access to the posting.
	Posting Number		
*	Open Date	This field is required.	
	Date desired for closing or initial review (minimum 30 days).	Minimum allowa period is thirty (3 days. Posting car	0) calendar
	Close Date	until filled.	·
	Open Until Filled	No	
*	Special Instructions to Applicant		
		Please select This field is required. Find category f	appropriate Fast

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

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

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

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

stings / EPA / Assistant Director for HR S	iystems (Draft) / Edit: Position Fundin	g Information			
Editing Posting	Position Funding Info	ormation	Save <> Prev	Next >>	
Posting Details	ARC Charles and User .				_
Position Funding Infor	Check spelling				
Supplemental Questions	* Required Information				
Applicant Documents	Budget Advisory Approval				_
References/Letters of		nt EPA and SPA positions that are funded in whole or in part by gener mmittee. To receive consideration of the Committee's review process	C++++	•	
Search Committee		ctives will not be met if the position is not filled.	State what miss		
Ranking Criteria			specific, essenti	•	
Posting Documents	Mission Specific, Essential and/or Key		and/or key obje	ctives	
Summary	Objectives not Met without position		will not be met i	if	
		-	position is not fi	i lled.	
	Funding Source Details	L			-
	Indicate the funding source	e(s) for this position. Click on "Add Funding Source Details Entry" to enter entry. Please note that the annual amount budgeted must equal the reque		d codes.	

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

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

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

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

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

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

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

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

Editing Posting	Supplemental Questions		Save << Prev Next
Posting Details		"Add a Question". A pop up section will appear where ye	ou can add an existing
Position Funding Infor	question or submit a new one.		
Supplemental Questions	Adding New Posting Questions: Click on the button labeled "Add a Question". A pop up section will appear where you can add an existing uestion or submit a new one. Adding Existing Posting Questions: There are two ways to search for approved posting questions to add to the job being posted. You can using the key word search or filter by question category. Submitting New Posting Questions: To submit a new question for review and approval, click on the button labeled "Add a Question". When a valiable 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. Included Supplemental Questions	being posted. You can filte	
Applicant Documents	Submitting New Posting Questions: To submit a new guesti	on for review and approval, click on the button labeled "	Add a Question" When th
References/Letters of			
Search Committee			pear where points and
Ranking Criteria	disqualitying responses can be associated to the posting qu	estion.	
Posting Documents	Posting Question Options: Once questions have been adde checking these boxes will make a question required.	d to the posting, you will see a column of checkboxes to	the left of each question;
Summary	Included Supplemental Questions	Click to add supplemental	Add a quest
	Position Required Category Que	stion questions.	Statu

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

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

	Add a	Question					×	
L	Avai	ilable Suppl	emental Que	stions				
l		gory: Any Category	 Keyword Question 	:			Filter supplemental ques by keyword or category.	
L	Add		How did you hear	about this emplo	wment opp	ortunity?		
Experience Do you have at least one year of responsible payroll or financial and statistical record keeping experience?						atistical record keeping		
		Education	Do you have a hig	jh school diploma	a or equival	ent?		
L		Experience	Do you have HR e	experience?				
		Education	Do you have a Hig	gh School diplom	ia?		V	
		Education	Do you have a Ma	aster's Degree?				
		Education	Do you have a Ma	aster's Degree?				
		Experience	How many years	of Accounting ex	perience do	you have in a higher edu	ucation setting?	
		Education	Do you have a Hig	gh School diplom	ia?	Click to submit a c	ustom supplemental	
		Experience	Do you have at le	ast 4 years of ex	perience?	question for review		
	Dipl	aying all 10		_		0.115.14		
С	ick ch	neck box to a	dd an			Can't find the one y	you want? Add a new one	
e	kisting	g supplement	al question.		Click Su finishe	ubmit when d.	Submit Cancel	
		01001 1000					11.	

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

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

Included S	Supplementa	I Questions		Add a q	uestion
Position	Required	Category	Question	Status	
1		Uncategorized	How did you hear about this employment opportunity?	active	
2		Experience	Do you have at least one year of responsible payroll or financial and statistical record keeping experience?	active	×
3		Education	Do you have a High Scho	active	
4		Experience	How many years of Accol Assign points to answers. ucation setting? Possible Answers: Predefined Options	active	Ø
	Click to ma required.	ike questions	Answer Points Disqualifying 1. 0 years Image: Comparison of the second s		
Reorde	r question	s.	Click to assign disqualifying answers.		vext >>

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

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

diting Posting	Click Included to make uploading a document optional.			Click <u>both</u> Included <u>and</u> Required make uploading a document requ	
Posting Details	Included	I to make the document(s) mar	n the application pro	received a second management of the second o	
Position Funding Infor					
Supplemental Questions	Order	Name	Included?	Required?	
Applicant Documents	1	Resume			
References/Letters of					
Search Committee	2	Cover Letter			
Ranking Criteria					
Posting Documents	3	Curriculum Vitae			
Summary	4	Teaching Philosophy			
	5	Letter Of Reference 1			
	6	Letter Of Reference 2			
	7	Letter Of Reference 3			

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

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

Editing Posting	References/Letters of Recommendation Save <pre>Save</pre>	Next >
Posting Details	Check spelling 🔽	
Position Funding Infor		
Supplemental Questions	Accept References: Please indicate whether or not you wish to require applicants to submit references with their application.	
Applicant Documents	Minimum Requests: Please indicate the minimum number of references you would like applicants to submit.	
References/Letters of	Maximum Requests: Please indicate the maximum number of references you would like applicants to submit.	
Search Committee	Cutoff Date: Please indicate the date by which reference information must be submitted.	
Ranking Criteria	* Required Information	
Posting Documents	References/Letters of Recommendation	
Summary	Accept References No	
eference	Minimum Requests Recommended range is 3 t	
	Maximum Requests	05.
formation may	Cutoff Date	
ot be submitted		
fter this date.	Save << Prev	Next

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

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

In the **Search Committee** tab, you can assign search committee members who will have access to review application information for a specific posting. Search committee members can view applications, applicant documents, and evaluate / rank applicants based upon ranking criteria you establish as part of the posting. Requests to add search committee members will be reviewed and approved by the Division of human Resources (DHR) once the posting request is routed to DHR for approval. Upon DHR approving a search committee member's access, the search committee member will receive an e-mail notification with instructions on how to access the online posting and related application information:

Editing Posting	Search Committee	Save <> Pre	Next >			
Posting Details	Search Committees are advisory in nature	and same the number of recruiting a qualified applicant pool, reviewing their credentials	and			
Position Funding Infor	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.					
Supplemental Questions						
Applicant Documents	Search Committee Members	Search Committee Members				
References/Letters of	No Search Committee Members have been assigned to this Posting yet.					
Search Committee						
Ranking Criteria	Search					
Posting Documents	Find a User to assign as a Search Committ	ee Member.				
Summary						
	First Name					
	Last Name	To search for a pre-approved search				
	Email Address	committee member, enter the name and				
	Search	click the Search button.				

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

Search Committee Memb	oers					
No Search Committee Members	have been a	Click the check box to assign the				
Search		search committee member as the committee chair.				
Find a User to assign as a Search Committee Memer.						
Name Email Address	Add Memb	er 🔶				
Lonnie Crotts emailaddress@zed.z	ed Add Mem	ber 🔲 Make Member The Committee Chair				
	_ 1					
First Name Lonnie						
Last Name Crotts		e Add Member button to add				
Email Address the search committee member you searched for.						
Search						

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

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

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

N	Natching User				
Username	ambraun				
First Name	e Amy				
Last Name	Braun	Click the Add User button to add the new			
Email	emailaddress@zed.zed				
Preferred Gro	oup Employee	search committee member in a pending			
Add User		status. Access will be reviewed and approved by DHR.			
Clear Matching	g Users		I		
New Search	Committee Member				
Request that so	meone be granted access to t	ne system for the purpose of serving as a Search Committee Mem	ber.		
Required fields	are indicated with an asterisk (*).			
Account Infor	mation				
Please enter th	ne following information to cre	eate an account for a new Search Committee Member.			
* First Na	ame Amy				
* Last Na	me Braun				
* Emai	ambraun@ncat.edu				
* Userna					
Submit					
Submit					
			Save << Prev Next >>		

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

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

Editing Posting	Ranking Crit	teria		Save <> Prev Next >
Posting Details	Ranking Criteria can be used used by search committees during the applicant review process to rank applicants based upon job-related			
Position Funding Infor		education factors. This optional too resented to the applicant.	ol can be helpful in identifying the most qualified candida	ites in an applicant pool. Ranking
Supplemental Questions	Adding New Ranking Criteria: Click on the button labeled "Add a Criterion". A dialog box will appear where you can add an existing criterion by			
Applicant Documents	checking the box in the "Add" column or submit a new one for approval.			
References/Letters of			v ranking criterion for review and approval, click on the b on the "Add a new one" link in the bottom right hand com	
Search Committee	Included Evalua	ative Criteria	Click to add reaking cuit	Add a Criterio
Ranking Criteria	Category	Description	Click to add ranking crit	Status
Posting Documents	1			
Summary				Save << Prev Next >

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

Available Evaluative Cr Category: Any Keyword Add Category Descripti	d:		Search for ranking	
1. 1 2. 2 3. 3 4. 4 5. 5	le Answers: Lindicate the ap that allows an a	applicant t		ar es or to
Uncategorized Teaching Displaying all 3	te the candidates experience related to the experience in a university	criterio	submit a custom ran n for review and appr e one you want? Add a ne	roval.
Click check box to add an existing ranking criterion.	Click Submit v finished.	vhen	Submit Car	ncel

Editing Posting	Ranking Crite	ria	Click Save or Next to	o move	Save	<< Prev	/ Next
Posting Details		n be used used by search com	to the next tab.		nts based up		
Position Funding Infor	experience and education factors. This optional toor can be reprorum demonstration of quantical canad criteria are not presented to the applicant.			e quanneu canulates	ates in an applicant pool. Ranking		lanking
Supplemental Questions			beled "Add a Criterion". A dialog box	will appear where yo	u can add an	existing cr	riterion b
Applicant Documents	-	the "Add" column or submit a n					
References/Letters of		Submitting New Ranking Criteria: To submit a new ranking criterion for review and approval, click on the button labeled "Add a Criterion". When the Available Evaluative Criteria box opens, click on the "Add a new one" link in the bottom right hand corner.					
	Included Evaluati	ve Criteria				Ad	dd a Criter
Search Committee					-		
 Search Committee Ranking Criteria 	Category	Description	Weig	ht Workflow State	Status		
Ranking Criteria	Category Uncategorized	Description Teaching experience in a univ	0	ht Workflow State Under Review by HF		0	
•		•	ersity		R active	8	

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

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

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

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

	Home Postings Hiring Proposals My Profile Help		
	Linc Butler, you have 0 messages. Supervisor	Ċ logou	
Postings / EPA / Assistant Director for HR	Systems (Draft) / Edit: Posting Documents		
Editing Posting	Posting Documents Save <- Prev N	ext >>	
Posting Details	To add a document to the posting, hover over the blue Action text link to the right of the document name.		
Position Funding Infor	Documents can be uploaded by browsing for the document or a document can be written or previously selected. Document types that are		
Supplemental Questions	supported as attachment include .doc, .docx, .pdf, .rtf, .		
Applicant Documents	PDE conversion must be completed for the document of		
References/Letters of	Document Type Name Status (Actions)		
Search Committee	Marketing Plan Actions		
Ranking Criteria	Print Ad Text Upload New		
Posting Documents	Create New Choose Existing Complete this page by clicking Save << Prev New	ext >>	
Summary	on Save and Next>		

<u>Create New EHRA Posting from a Position Description – Summary Tab</u>

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

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

Postings	/ EPA / Assistant Director for HR Systems (D	raft) / Summary		
	Section/Unit: VC for Human Resources	for HR Systems (EPA) Created by: Linc Butler Owner: Linc Butler Hiring Proposals Associated Position Description		Take Action On Posting • See how Posting looks to Applicant Print Preview (Applicant View) Print Preview
	Summary History Settings	ning Proposals Associated Position Description		
	you are ready to submit your postiny To edit the posting, click on the Edit make necessary corrections before Posting Details Edit Classification Information	priate Workflow Action by hovering over the orange "Take Action on this g, click on the Submit button on the popup box. I tink next to the Section Name in the Summary Section. This will take y moving to the next step in the workflow. Click "Edit" to make e		
	HELP TEXT: If the details below	are incorrect, ple	de menu while modifying the Position.	
BI	ue Circle Check	Assistant Director 82229		
	Classification Type	EPA		
	Salary Range	\$55,000 - \$60,000		
	Minimum Experience/Education			

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

Position Funding Informate	tion <u>Edit</u>	Click "Edit" to make edits to a tab.	
		ons that are funded in whole or in part by general state fur mittee's review process, state below what mission specific	
Mission Specific, Essentia and/or Key Objectives not M without position			

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

NORTH CAROLINA A&T STATE UNIVERSITY		Inbox PeopleAdmin Watch List APPLICANT TRACKING
	Home Postings Hiring Proposals My Profile	Help
		Linc Butler, you have 0 messages. Supervisor 💽 C logout
Postings / EPA / Assistant Director for HR Systems (Draft) / State Posting: Assistant Director for H Edit Current Status: Draft Position Type: EPA Section/Unit: VC for Human Resources Summary History Settings		Take Action On Posting • WORKELOW ACTIONS Keep working on this Posting Canceled (move to Canceled) Send to Department Head (move to Department Head)
	efully before continuing. Forkflow Action by hovering over the orange "Take Action on thi it, in the popup box that appears. When you are ready to submit	

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



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

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

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

Posting was successfully transitioned							8
North Carolina A&T State University					Watch List	APPLICANT TRACKING	
	Home Postings H	Hiring Proposals	My Profile	Help			
				Linc Butler, you have 0 messag	s. Supervisor	• ¢	logout
Green confirmation bar indicatin	•	g					
Request was successfully transiti	ioned and						
added to your Watch List.							
Current Status: Department Head				🚖 See how	osting looks to	Applicant	

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

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

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

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

	RTH CAROLINA T STATE UNIVERSITY					(Inbox) Watch List	PeopleAdmin APPLICANT TRACKING
		H	ome Posting	s Hiring Proposals	My Profile	Help	
						Linc Butler, you have 0 messages. Superviso	r 🔽 🕑 logout
Po Sec Res		IR Systems (Draft) / Summary Director for HR Sys Created by: Linc Owner: Linc Buth Settings Hiring Proposal	Butler Pr	Position Description		Take Action On Posting v workeLow Actions Keep working on this Postin Canceled (move to Cancelee Send to Department Head (Department Head)	d)

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

	Li
ary	Take Action X
or (TLI	Keep working on this Posting Comments (optional)
	Enter comments if desired.
utler	-
	Add this posting to your watch list?
Submit	when complete. 🗕 Submit Cancel
	11
ore cont	inuina

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

Create New Post Doctoral Posting

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

NORTH CAROLINA A&T STATE UNIVERSITY					PeopleAdmin APPLICANT TRACKING
	Home Postings Hiring Propos		utler, you have 0 messa	ges. Supervisor	C logout
Hover cursor over Postings tab and click on Post Doctoral. Welcome to your Online Recruitment and P	Position Management System				
 Inbox (14 items need your attention) Displaying items for group "Supervisor". Postings (3) Hiring Proposals (0) Pending Requests (10+) 	Or click on Create I Doctoral Posting in		Create N	s ew SPA Posting ew EPA Posting ew Post Doctoral Pos	sting
Job Title Type	Current State	Owner			

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

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

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

ALT STATE UNIVERSITY		Home Postings Hiring Propos	Acti	ve user type is ervisor.	(Inhos) PeopleAdmin Watch List APPLICANT TRACKING • Bupervisor • C logo Create New Posting
Open Saved Search ▼ Search: Add Column: Workflow State: Department:	Add Column Draft Supervisor Department Head Department Head Department For Chancellor AD Administration AD Administration Computing AVC of Processor Supe 8 Restet	Search Hide search options		customizable by putes and can be r use.	
List of curren EHRA posting user tr Ad hoc with	s by active				
Position Title	(O Items Found) Posting Number	Department	Active Applications	Workflow State	Actions (Actions)

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

						Inbox Watch List	PeopleAdmin Applicant tracking	-
Home	Postings	Hiring Proposals	My Profile	Help				
					Linc Butler, you have 0 messages.	Supervisor	r 💌 C lo	ogout
Search M	ore search online	19			Click here to initiate a Create New Posting request.		Create New Posting	

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

×
is new
Click here to Create New Posting from an existing posting.
Click here to Create New Posting from an approved position description.

Create New Post Doctoral Posting from an Existing Posting

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

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

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



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

NORTHI CAROLINA ART STATE UNIVERSITY	Home Postings	Applicants Hiring Proposals C	Doboardina Events		(Inbox) PeopleAdmin Watch List APPLICANT TRACKING V
Postings / Post Doctoral Post Doctoral Postings			Active use Supervisor		Human Resources Create New Posting
Open Saved Search + Search: List of current / pendi postings by active use	-	More search options	Searches are custo position attributes saved for later use	and can be	Actions drop down menu.
Search: "All Postings" (1 Item Four Position Title Post Doctoral Research Associate (TLB40)	ld) 😨 Posting Number	Department VC for Human Resources	Active Applications	Workflow State	Actions (Actions)

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



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

Create New Posting button to begin updating posting information:

Postings / Post Doctoral / New Posting			
New Posting		Create new	Create New Posting Cancel
* Required Information		posting button.	
Position Title	Post Doctoral Research Associate (TLB40)		
Organizational Unit			
Division/School/College ×	VC for Human Resources	Confir	m Organizational Unit
Department *	VC for Human Resources	inform	ation.
Section/Unit *	VC for Human Resources		
Online Applications			
☑ Accept online applications?			
Special offline application instructions	offlind instru	le special e application ctions if	Create new posting button.
	neces	sary.	Create New Posting Cancel

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

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

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

Tab list	Home	Postings Hiring Proposals	My Profile	Help		_
				Linc Butler, you have 0 messages.	Supervisor	C logout
Postings / I st Doctoral / Post Doctoral Rese	earch Associate (TLB40) (Draft) / Edit	t: Posting Details				
Editing Posting	Posting Details		Sav	e and Next button	Sav	ve Next >>
Posting Details	Check spelling				5.	
Position Funding Infor						
Supplemental Questions	Proceed through all sections	completing all necessary infor	mation. To submi	he Next button or select the page t the Posting to Human Resource	s, you must go to the	Posting
Applicant Documents				ummary Page or select Posting S e orange Action button for a list o		
References	* Required Information					
Search Committee	Classification Information					
Ranking Criteria	HELP TEXT: If the details t	below are incorrect, please r	nake the appropr	iate Classification selection usi	ng the "Classificatior	1' Tab on the
Posting Documents	left side menu while modify	ring the Position.			0	
Summary	Position/Classification Title	Post Doc Research Associate				
	Job Code	81069				
Blue Check Circle	Classification Type	Post Doctoral				
	Minimum Experience/Education					

<u>Create New Post Doctoral Posting from an Existing Posting – Posting</u> <u>Details Tab</u>

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

	Home Postings	Hiring Proposals	My Profile	Help		_
				Linc Butler, you have 0 messages	s. Supervisor	C logo
Postings / Post Doctoral / Post Doctoral Re	esearch Associate (TLB40) (Draft) / Edit: Posting	Details				
Editing Posting	Posting Details		Save a	and Next buttons.	Save	e Next >>
Posting Details						
Position Funding Infor	[№] <u>Check spelling</u> ▼					
Supplemental Questions	To create a Posting, first complete the Proceed through all sections complete	ng all necessary informati	ion. To submit	t the Posting to Human Resource	ces, you must go to the F	Posting
Applicant Documents	Summary Page by clicking on the Ne navigation menu. Once a summary pa					
References	* Required Information	5 11 7 7		5		
Search Committee	Classification Information					
Ranking Criteria	HELP TEXT: If the details below an	e incorrect please make	e the appropri	iate Classification selection us	sing the "Classification"	' Tab on the
Posting Documents	left side menu while modifying the F					
Summary	Position/Classification Title Post Doc	c Research Associate				
	Job Code 81069		Fie	elds from the prior	r posting will	be
	Classification Type Post Doc	ctoral	со	pied in to your ne	w posting.	
	Minimum Experience/Education			-	_	

(Position Overview			
	Primary Purpose of Position Primary Function of Organizational Unit	Test	Position Overview and Position Information: Continue to enter posting information into any empty fields as needed.	
	Position Information			
	* Position Title	Post Doctoral Research Associate (TLB40)		
	* Working Title		This field is required.	
	Position Number	999999		Poquired fields will be
	* JCAT	12345		Required fields will be highlighted in RED .
	Approved Salary	\$40,000		
	* Salary Range	Enter salary to be advertised amount or a d	This field is required.	ith education and experience"
	* FLSA	Exempt		
	* Appointment Type	Time Limited - Full-time		
	* If Time Limited, Appointment Length	08/08/2014 Please indicate budget end date. If funded t	from more than one fund indicate ear	liest end date. This field cannot be left blank.
	FTE			

You can indicate other users you would like to have **Supervisor** and / or **Applicant Reviewer** access to the posting by searching for their name in the Supervisor and Applicant Reviewer fields. Indicate the proposed **Open Date** and **Date Desired for Closing or Initial Review (minimum 30 days)**, which will define the number of days applicants can view and apply for the posting. The minimum allowable posting period for

Post Doctoral positions is thirty (30) calendar days, however, a Post Doctoral posting can be posted as open until filled. Select the appropriate **Fast Find** category for the posting to ensure it is included in the correct pre-defined search when an applicant clicks on the corresponding Fast Find button through the applicant portal. Choices are Administrators and Research, Faculty, Post Doctoral, Temporary Staff, and Staff:



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

Advertising Summary			Include any special advertising request information.
	Please list additional external advertising sources if different than stand Standard sources include: NC Employment Security Commission & UN	0	
 Pass Message 	Thank you for your interest in this position. The screening and selection process is currently underway and will continue until a successful candidate is chosen. Should review of your qualifications result in a decision to pursue your candidacy, you will be contacted.		Template applicant e-mail notifications.
* Fail Message	Thank you for your interest in this position. Based on your responses to the questions on the employment application, you do not meet the minimum qualifications for this position. Please do not let this discourage you from applying for other positions that interest you.		
	Save an	nd Next bu	Ittons.

<u>Create New Post Doctoral Posting from an Existing Posting – Position</u> <u>Funding Information Tab</u>

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

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

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

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

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

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

<u>Create New Post Doctoral Posting from an Existing Posting –</u> <u>Supplemental Questions Tab</u>

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

Editing Posting	Supplemental Questions		Save <> Prev Next 3		
Posting Details	Adding New Posting Questions: Click on the button labeled	"Add a Question". A pop up section will appear whe	ere you can add an existing		
Position Funding Infor	question or create a new one.				
Supplemental Questions	Adding Existing Posting Questions: There are two ways to search for approved posting questions to add to the job being posted. You can filter using the key word search or filter by question category. Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear where points and				
Applicant Documents					
References	disqualifying responses can be associated to the posting qu		and poed where points and		
Search Committee	Posting Question Options: Once questions have been added	d to the posting, you will see a column of checkboxe	es to the left of each question;		
Ranking Criteria	checking these boxes will make a question required.				
Posting Documents	Included Supplemental Questions	Click to add supplementa	Add a questi		
Summary	Position Required Category Que	stion	Statu		
		questions.			

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

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

Add	Category	Question		Filter supplemental questic by keyword or category.		
	Uncategorized	How did you hear about this employment op	oportunity?	, , , ,		
	Experience	Do you have at least one year of responsible experience?	e payroll or financial and stati	stical record keeping		
	Education	Do you have a high school diploma or equiv	alent?			
	Experience	Do you have HR experience?				
	Education	Do you have a High School diploma?				
	Education	Do you have a Master's Degree?				
	Education	Do you have a Master's Degree?				
	Experience	How many years of Accounting experience		tion estimat		
	Education	Do you have a High School diploma?	Click to submit a cust			
	Experience	Do you have at least 4 years of experience?	question for review a	ind approval.		
	Education Experience Education	Do you have a Master's Degree? How many years of Accounting experience Do you have a High School diploma?	Click to submit a cust	••		

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.

	Category	Question			Status	
	Uncategorized	How did you hear about th	is employment opportunity?		active	×
	Experience	Do you have at least one y keeping experience?	ear of responsible payroll or financial and s	tatistical record	active	C
	Education	Do you have a High Scho		1	active	0
	Experience	How many years of Accou	Assign points to answers.	ucation setting?	active	¢
]	Possible Answers: Predef	· · · · · · · · · · · · · · · · · · ·	Disqualifying		
lick to ma equired.	ake questions	1. 0 years 2. 1-3 years 3. 4-5 years				
	_	4. 5+ years				

<u>Create New Post Doctoral Posting from an Existing Posting – Applicant</u> <u>Documents Tab</u>

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

diting Posting		ncluded to make ding a document o	optional.	Click <u>both</u> Included <u>and</u> Required to make uploading a document requir
Position Funding Infor	Included Order	to make the document(s) man	datory to complete the included?	he application process. Required?
Supplemental Questions	Order	Iname	Included?	Requireu?
Applicant Documents	1	Resume		
References				
Search Committee	2	Cover Letter		
Ranking Criteria			_	_
Posting Documents	3	Curriculum Vitae		
Summary	4	Teaching Philosophy		
	5	Letter Of Reference 1		
	6	Letter Of Reference 2		8
	7	Letter Of Reference 3		

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

In the **References / Letters of Recommendation** tab, you can indicate whether or not you wish to require applicants to submit references with their application. You can also indicate the minimum and maximum number of references you would like applicants to submit, and the cutoff date by which reference information must be submitted: 174

Postings / Post Doctoral / Post Doctoral Re	esearch Associate (TLB40) (Draft) / Edit: References
Editing Posting	References Save << Prev Nex
Posting Details Position Funding Infor Supplemental Questions Applicant Documents References Search Committee Ranking Criteria Posting Documents	 Check spelling Accept References: Please indicate whether or not you wish to require applicants to submit references with their application. Minimum Requests: Please indicate the minimum number of references you would like applicants to submit. Maximum Requests: Please indicate the maximum number of references you would like applicants to submit. Cutoff Date: Please indicate the date by which reference information must be submitted. * Required Information References
Summary Reference information may not be submitted after this date.	Accept References Minimum Requests Maximum Requests Cutoff Date Save <

<u>Create New Post Doctoral Posting from an Existing Posting – Search</u> <u>Committee Tab</u>

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

In the **Search Committee** tab, you can assign search committee members who will have access to review application information for a specific posting. Search committee members can view applications, applicant documents, and evaluate / rank applicants based upon ranking criteria you establish as part of the posting. Requests to add search committee members will be reviewed and approved by the Division of human Resources (DHR) once the posting request is routed to DHR for approval. Upon DHR approving a search committee member's access, the search committee member will receive an e-mail notification with instructions on how to access the online posting and related application information:

Editing Posting	Search Committee		Save << Prev Next >				
Posting Details	Search Committees are advisory in pat	ure and serve the purpose of recruiting a qualified applicant pool, reviewing the	oir crodontials, and				
Position Funding Infor	recommending acceptable candidates t	recommending acceptable candidates to the hiring manager. Search Committees can consist of University employees both internal and external					
Supplemental Questions	to the hiring unit, as well as individuals external to the University who represent key stakeholders.						
Applicant Documents	Search Committee Members						
References/Letters of	No Search Committee Members have been assigned to this Posting yet.						
Search Committee	Dearch						
Ranking Criteria	Search						
Posting Documents	Find a User to assign as a Search Com	mittee Member.					
Summary							
	First Name						
	Last Name	To search for a pre-approved search					
	Email Address	committee member, enter the name and					
		click the Search button.					

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

Search Committee Membe	rs
No Search Committee Members h	nave been a Click the check box to assign the
Search	search committee member as the committee chair.
Find a User to assign as a Search	n Committee Memer.
Name Email Address	Add Member
Lonnie Crotts emailaddress@zed.zed	Add Member 🔲 Make Member The Committee Chair
First Name Lonnie	
Last Name Crotts	Click the Add Member button to add
Email Address	the search committee member you searched for.
Search	

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

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

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

Mat						
Username	ambraun					
First Name	Amy					
Last Name	Braun	Click the Add User button to add the new				
Email Breferred Crow	emailaddress@zed.zed	search committee member in a pending				
Preferred Group Employee		status. Access will be reviewed and				
Add User		approved by DHR.				
Clear Matching U	leore					
oloar materning o	3013					
New Search C	committee Member					
Request that some	eone be granted access to th	ne system for the purpose of serving as a Search Committee Member	г.			
	0	, , , , , , , , , , , , , , , , , , , ,				
Required fields are	e indicated with an asterisk (~).				
Account Informa	ation					
Please enter the	following information to cre	eate an account for a new Search Committee Member.				
* First Nam						
* Last Name	e Braun					
* Email	ambraun@ncat.edu					
* Username	e ambraun					
Submit						
			Save	<< Prev	Next >>	

<u>Create New Post Doctoral Posting from an Existing Posting – Ranking</u> <u>Criteria Tab</u>

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

 Position Funding Infor Supplemental Questions Applicant Documents References/Letters of 	d education factors. This optional too presented to the applicant. anking Criteria: Click on the button la	nittees during the applicant review process to rank applicant I can be helpful in identifying the most qualified candidates abeled "Add a Criterion". A dialog box will appear where you	in an applicant pool. Ranking				
 Supplemental Questions Applicant Documents References/Letters of Search Committee 	anking Criteria: Click on the button la		can add an aviating aritarian by				
 Applicant Documents References/Letters of Search Committee 			can add an existing criterion by				
Applicant Documents Submitting N References/Letters of the Available Search Committee Included Eva	ox in the Add column of submit a ne		can add an existing chienon by				
References/Letters of the Available Search Committee		checking the box in the "Add" column or submit a new one for approval.					
		ranking criterion for review and approval, click on the buttor n the "Add a new one" link in the bottom right hand corner.	a labeled "Add a Criterion". Whe				
Ranking Criteria Category	uative Criteria		Add a Criteri				
	Description	Click to add ranking criteria	A. Status				
Posting Documents							
Summary			Save << Prev Next:				

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

Category: Any Add Category	Keyword: Description		Search for ranking criteria b keyword or category.
Uncategoriz	ed Rank Experience - 5 is Possible Answers: 1. 1 2. 2 3. 3 4. 4 5. 5	Indicate the appli	cant workflow state plicant to be ranked.
	Applicant workflow	state Under Review by HR	
Uncategoriz		lates experience related to th	Click to submit a custom ranking
		lates experience related to th	

Editing Posting Posting Details		Click Save or Next to move to the next tab.			applicar	Save <pre> Prev Next > applicants based upon job-related didates in an applicant pool. Ranking</pre>		
Position Funding Infor	criteria are not presented	criteria are not presented to the applicant.						
Supplemental Questions		Adding New Ranking Criteria: Click on the button labeled "Add a Criterion". A dialog box will appear where you can add an existing criterion by checking the box in the "Add" column or submit a new one for approval.					ng criterion by	
Applicant Documents	0							
References/Letters of	Submitting New Ranking Criteria: To submit a new ranking criterion for review and approval, click on the button labeled "Add a Crite eferences/Letters of the Available Evaluative Criteria box opens, click on the "Add a new one" link in the bottom right hand corner.						riterion". Whe	
		Included Evaluative Criteria						
Search Committee	Included Evaluative Cr	iteria						Add a Criterio
Search Committee Ranking Criteria		iteria Description		Weight	Workflow State	Status		Add a Criterio
Ranking Criteria			niversity	Weight	Workflow State Under Review by HR		0	Add a Criterio
Ranking Criteria Posting Documents	Category	Description Teaching experience in a u	niversity experience related to the job:	Weight		active	8	Add a Criterio
Ranking Criteria	Category Uncategorized	Description Teaching experience in a u	experience related to the job:	Weight	Under Review by HR	active active		Add a Criterio
Ranking Criteria Posting Documents	Category Uncategorized Uncategorized	Description Teaching experience in a u Please rate the candidates	experience related to the job:	Weight	Under Review by HR Under Review by HR	active active		Add a Criterio

<u>Create New Post Doctoral Posting from an Existing Posting – Posting</u> <u>Documents Tab</u>

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

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

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

Editing Posting	Posting Documents	Save << Prev Next
Posting Details	To add a document to the posting, hover over the blue Action text link to the right of the document	t name.
Position Funding Infor	Documents can be uploaded by browsing for the document or a document can be written or previous	
Supplemental Questions	supported as attachment include .doc, .docx, .pdf, .rtf the theta tiff, tiff incoming incomparises converted to .pdf for security.	
Applicant Documents	PDF conversion must be completed for the docume Click "Actions", then sel	-
References/Letters of	Document Type Name Status (Actions) Create New, or Choose	Existing in order
Search Committee	Marketing Plan Actions to upload an attachmen	it.
Ranking Criteria	Print Ad Text Upload New	
Posting Documents	Create New Choose Existing	Save <> Prev Next
Summary	Complete this page by clic	king

<u>Create New Post Doctoral Posting from an Existing Posting – Summary</u> <u>Tab</u>

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

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

Posting	Postings / Post Doctoral / Post Doctoral Research Associate (TLB40) (Draft) / Summary						
		earch Associate (TLB40) Sreated by: Linc Butter Swner, Linc Butter	Take Action On Posting • * See how Posting looks to Applicant				
ſ	Summary History Settings	Hiring Proposals Associated Position Description					
	you are ready to submit your posting. To edit the posting, click on the Edit	ing carefully before continuing. viriate Workflow Action by hovering over the orange "Take Action on this Posting" button. You may add a Comment to the posting and also add this posting to your Wate a, click on the Submit button on the popup box. Link next to the Section Name in the Summary Section. This will take you directly to the Posting Page to Edit. If a section has an orange icon with an exclamation poin moving to the next step in the workflow. Click "Edit" to make edits to a tab. are incorrect, please make the appropriate Classification selection using the Classification Tab on the left side menu while modifying the Position.					
В	lue Circle Check	Post Doc Research Associate 81069					
	Classification Type Minimum Experience/Education	Post Doctoral					

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

Position Funding Information Edit	Click "Edit" to make edits to a tab.	
Budget Advisory Approval		l
	ons that are funded in whole or in part by general state fun nittee's review process, state below what mission specific,	
Mission Specific, Essential and/or Key Objectives not Met without position		

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

	People Admin
ART STATE UNIVERSITY Watch List	APPLICANT TRACKING
Home Postings Hiring Proposals My Profile Help	
Linc Butler, you have 0 messages. Supervisor	C logout
Postings / Post Doctoral / Post Doctoral Research Associate (TLB40) (Draft) / Summary	
 Posting: Post Doctoral Research (Post Doctoral) Edit Current Status: Draft Position Type: Post Doctoral Section/Unit: VC for Human Resources Summary History Settings Hiring Pr)))
Please review the details of the posting carefully before continuing.	
To take the action, select the appropriate Workflow Action by hovering over the orange "Take Action on this Posting" button. You may add a Comment to and also add this posting to your Watch List . in the popup box that appears. When you are ready to submit your posting, click on the Submit button on th box.	
To edit the posting, click on the Edit link next to the Section Name in the Summary Section. This will take you directly to the Posting Page to Edit. If a san orange icon with an exclamation point, you will need to review this section and make necessary corrections before moving to the next step in the work	

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

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

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

"Fund" is required and All required fields must be set before transitioning.		8
NORTH CAROLINA A&T STATE UNIVERSITY	Watch List APPLICANT TRACKING	
Red bar indicating the required fields that need to be completed before submitting the request to the next step in the workflow.	Linc Butler, you have 0 messages. Supervisor 💌 C	logout
Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

Home Postings Hiring Proposals My Profile Help	Watch List APPLICANT TRACKING
Green confirmation bar indicating the Pending	
Green confirmation bar indicating the Pending	
	s. Supervisor 🔽 C log
Request was successfully transitioned and	
added to your Watch List.	

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

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

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

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

NORTH CAROLINA A&T STATE UNIVERSITY						Inbox Watch List	PeopleAdmin APPLICANT TRACKING
	Home	Postings	Hiring Proposals	My Profile	Help		
					Linc Butler, you have 0 messages.	Supervisor	▼ Ċ
stings / Post Doctoral / Post Doctoral Resea	rch Associate (TLB40) (Draft) / S	ummary					
Posting: Post Doctoral (Post Doctoral) Edit Current Status: Draft Position Type: Post Doctoral Section/Unit: VC for Human Resources Summary History Settin	Created by: Linc Butler Owner: Linc Butler		sition Description		Take Action On WorkFLOW ACT Keep working Canceled (mov Send to Depar Department He	ons on this Posting ve to Canceled tment Head (n	j)
Please review the details of t		ntinuina.					
					s Posting" button. You may add a your posting, click on the Submit		
To edit the posting, click on the							

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

5) Click "Submit"



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

Create New Post Doctoral Posting from a Position Description

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

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

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



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

NORTH CAROLINA A&T STATE UNIVERSITY						Wa		eAdmin CANT TRACKING
ings / Post Doctoral / Create from Po Post Doctoral Position I			Home Postings Hiring I		Active user t Supervisor.	ype is	Supervisor	• ¢
Open Saved Search + Sec Add Column Department	AD Administration		Search Hide search options	position	are customi attributes ar r later use.	-		
							Action	s dro
	• •					L	down	menu
List of current , position descri	• •	ctive user ty					down	menu
Dosition descri	ptions by a	ctive user ty				L	down	menu
Ad hoc with Ad hoc with ad Search: "Post Doc	Post Doctoral Position De	ctive user ty		Position/Classification Title	Department	Supervisor	down	
Dosition descri	Post Doctoral Position De	ctive user ty sc © ons" (2 Items Found)	pe.	Position/Classification Title Post Doc Research Associate	Department Bioenergy Center	Supervisor Human Resources Consultant (Amy Braun)		Menu (Actions)

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



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

Create New Posting button to begin updating posting information:

Postings / Post Doctoral / New Posting New Posting · Required Information		Create new posting button.	Create New Posting Cancel
Position Title	Post Doctoral Research Associate (TLB40)	,	
Organizational Unit Division/School/College *	VC for Human Resources	Confir	m Organizational Unit
Department *	VC for Human Resources	inform	-
Section/Unit *	VC for Human Resources		
Online Applications Z Accept online applications?			
Special offline application instructions	Inclue	de special	
	offlin instru	e application uctions if	Create new posting button.
	neces	ssary.	Create New Posting Cancel

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

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

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

Tab list	Home P	Postings Hiring Proposals	My Profile	Help		
Tab list Linc Butler, you have 0 messages. Supervisor Image: Control of the state of	C logout					
Postings / I st Doctoral / Post Doctoral Rese	Int Linc Butler, you have 0 messages. Supervisor ♥ al / Post Doctoral Research Associate (11.E40) (0raft) / Edit: Posting Details Save and Next buttons. Image: Next>> ang infor al Questions Save and Next buttons. Image: Next>> al Questions Save and Next button or select the page in the left hand navigation menu. al Questions To create a Posting, first complete the information on this screen, then click the Next button or select the page in the left hand navigation menu. summary Page by clicking on the Next button until you reach the Posting to Human Resources, you must go to the Posting Summary Page by clicking on the Next button until you reach the Posting Summary Page for the left mittee Image by clicking on the Next button until you reach the Posting Summary Page for the left mittee Classification Information teria Image by clicking the Position. Postion/Classification Post Doc Research Associate Title Post Doc Research Associate Job Code 81069					
	Linc Butter, you have 0 messages Supervisor © logot ctoral Research Associate (1LB40) (Draft) / Edit: Posting Details Save and Next buttons. © message Next> Posting Details Save and Next buttons. © message Next> Proceed through all sections completing all necessary information. To submit the Posting to Human Resources, you must page to the Posting Summary Page or select Posting Summary Page to policiking on the Next button until you reach the Posting Summary Page or select Posting Summary Page from the left navigation menu. Once a summary page appears, hover your mouse over the orange Action button for a list of possible approval step options. • Required Information Het Posting. Destification Information Post Doc Research Associate Title Post Doc Research Associate Job Code 81069 Clessification Type Post Doctoral Minimum Ninimum					
Editing Posting	Posting Details		Sav	e and Next button	ttons. Save Next>>> he page in the left hand navigation menu. asources, you must go to the Posting posting Summary Page from the left a list of possible approval step options.	
Posting Details	ABC Check appelling		547		3.	e left hand navigation menu. must go to the Posting ary Page from the left ible approval step options.
Position Funding Infor						
Supplemental Questions	Proceed through all sections	completing all necessary information	tion. To submi	t the Posting to Human Resource	s, you must go to th	e Posting
Applicant Documents						
References	* Required Information					Save Next >> d navigation menu. to the Posting from the left oval step options.
Search Committee	Classification Information	Linc Butler, you have 0 messages: Supervisor © logot \$40) (Draft) / Edit: Posting Details etails Save and Next buttons. Save Next>>> Saling ♥ Save and Next button or select the page in the left hand navigation menu. Save and Next button or select the page in the left hand navigation menu. gip all sections completing all necessary information. To submit the Posting to Human Resources, you must go to the Posting ge by clicking on the Next button until you reach the Posting Summary Page or select Posting Summary Page from the left nu. Once a summary page appears, hover your mouse over the orange Action button for a list of possible approval step options. mation If the details below are incorrect, please make the appropriate Classification selection using the "Classification' Tab on the uwhile modifying the Position. Classification reduction Post Doc Research Associate b Code 81069 ication Type Post Doctoral				
Ranking Criteria	HELP TEXT: If the details b	pelow are incorrect, please mail	e the appropr	iate Classification selection usi	ng the "Classificati	on' Tab on the
Posting Documents	left side menu while modifyi	ing the Position.				
Tab list Line B Postings / Int Doctoral / Post Doctoral Research Associate (TLB40) (Draft) / Edit: Posting Details Save and Editing Posting Posting Details Save and Posting Details Check spelling Image: Check spelling Image: Check spelling Posting Details Posting Details To create a Posting, first complete the information on this screen, then click the Next by Proceed through all sections completing all necessary information. To submit the Posti Summary Page by clicking on the Next button until you reach the Posting Summary Page by clicking on the Next button until you reach the Posting Summary Page by clicking on the Next button until you reach the Posting Summary Page by clicking on the Next button until you reach the Posting Summary Page by clicking on the Next button until you reach the Posting Summary Page by clicking on the Next button until you reach the Posting Summary Page by clicking on the Next button until you reach the Posting Summary Page by clicking on the Next button until you reach the Posting Summary Page by clicking on the Next button until you reach the Posting Summary Page by clicking on the Next button until you reach the Posting Summary Page by clicking on the Next button until you reach the Posting Summary Page by clicking on the Next button until you reach the Posting Summary Page by clicking on the Next button until you reach the Posting Summary Page by clicking on the Next button until you reach the Posting Summary Page Posting Documents Posting Documents Summary Summary Post Doc Research Associate Job Code 81069 <						
	Job Code	81069			the page in the left hand navigation menu. tesources, you must go to the Posting tosting Summary Page from the left or a list of possible approval step options.	
Tab list Linc Butler, you have 0 messages. Supervisor Postings / bit Doctoral / Post Doctoral Research Associate (ILB40) (Draft) / Edit: Posting Details Built Doctoral / Post Doctoral Research Associate (ILB40) (Draft) / Edit: Posting Details Posting Details Posting Details Save and Next buttons. © Position Funding Infor © Check spelling © To create a Posting, first complete the information on this screen, then click the Next button or select the page in the left hand © Applicant Documents © Check spelling © To create a Posting on the Next button until you reach the Posting of Human Resources, you must go to submit the Posting of Human Resources, you must go to submary Page by clicking on the Next button until you reach the Posting Summary Page or select Posting Summary Page by clicking on the Next button until you reach the Posting Summary Page or select Posting Summary Page to select Information References Classification Information © Posting Documents Classification Information Blue Check Circle Post Doc Research Associate Job Code 81069 Classification Type Post Doctoral Minimum Post Doctoral						

<u>Create New Post Doctoral Posting from a Position Description – Posting</u> <u>Details Tab</u>

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

	Home Postings	Hiring Proposals	My Profile	Help	
				Linc Butler, you have 0 messages.	Supervisor C logo
Postings / Post Doctoral / Post Doctoral Re	esearch Associate (TLB40) (Draft) / Edit: Posting	Details			
	Is / Post Doctoral / Post Doctoral Research Associate (TLB40) (Draft) / Edit: Posting Details Iditing Posting Posting Details Position Funding Infor Supplemental Questions Applicant Documents References Search Committee Ranking Criteria				
Editing Posting	Posting Details		Save a	and Next buttons.	Save Next >>
Posting Details					
Position Funding Infor					
Supplemental Questions	Proceed through all sections complete	ting all necessary informat	tion. To submit	the Posting to Human Resource	es, you must go to the Posting
Applicant Documents					
References	* Required Information				
Search Committee	Classification Information				
Ranking Criteria	HELP TEXT: If the details below a	re incorrect, please mak	e the appropri	iate Classification selection usi	ing the "Classification' Tab on the
Posting Documents					5
Summary		oc Research Associate		lds from the oppr	avad position
	Job Code 81069			elds from the appr	•
	Classification Type Post Do	octoral			opied in to your new
	Minimum Experience/Education		ро	osting.	

Position Overview			
Primary Purpose of Position Primary Function of Organizational Unit	Test	Position Overview and Continue to enter post any empty fields as ne	ing information into
Position Information			
* Position Title	Post Doctoral Research Associate (TLB40)		
* Working Title		This field is required.	
Position Number	999999		Dequired fields will be
* JCAT	12345		Required fields will be highlighted in RED .
Approved Salary	JCAT 12345		
* Salary Range	Enter salary to be advertised amount or a c	This field is required.	ith education and experience"
* FLSA	Exempt		
* Appointment Type	Time Limited - Full-time		
* If Time Limited, Appointment Length	08/08/2014 Please indicate budget end date. If funded	from more than one fund indicate ear	liest end date. This field cannot be left blank.
FTE			

You can indicate other users you would like to have **Supervisor** and / or **Applicant Reviewer** access to the posting by searching for their name in the Supervisor and Applicant Reviewer fields. Indicate the proposed **Open Date** and **Date Desired for Closing or Initial Review (minimum 30 days)**, which will define the number of days applicants can view and apply for the posting. The minimum allowable posting period for

Post Doctoral positions is thirty (30) calendar days, however, a Post Doctoral posting can be posted as open until filled. Select the appropriate **Fast Find** category for the posting to ensure it is included in the correct pre-defined search when an applicant clicks on the corresponding Fast Find button through the applicant portal. Choices are Administrators and Research, Faculty, Post Doctoral, Temporary Staff, and Staff:



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

	Advertising Summary		*		adve	ude any special ertising request rmation.	
		Please list additional external advertising sources if different than s Standard sources include: NC Employment Security Commission &			0	7	
*	Pass Message	Thank you for your interest in this position. The screening and selection process is currently underway and will continue until a successful candidate is chosen. Should review of your qualifications result in a decision to pursue your candidacy, you will be contacted.	*		Templa	te applicant e-mail itions.	
	Fail Message	Thank you for your interest in this position. Based on your responses to the questions on the employment application, you do not meet the minimum qualifications for this position. Please do not let this discourage you from applying for other positions that interest you.	*				
		Save	an	d Next	buttons.	Save Neet >>	

<u>Create New Post Doctoral Posting from a Position Description – Position</u> <u>Funding Information Tab</u>

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

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

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

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

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

Funding Source Details			
Indicate the funding source must equal the requested s		Details Entry" to enter budget and other required codes. Select "SAVE" after each	n entry. Please note that the annual amount budgeted
		nding Source Details Entry" and "Save" until all sources are entered. Each time you	add an additional entry, you will need to scroll down
State Appropriated * Funding / Non-State Appropriated Funding	State Appropriated Funding	Funding information	
If non-state, select source of funding	Please select	will be copied in from	
lf other, designate source		the approved position	
* Budget Code	16070 (State)	• • •	
* Fund	111111 Format: 6 digit number #######	can edit as necessary.	
• Org	11111 Format: 5 digit number ######		
* Account	11111 Format: 5 digit number ######		IMPORANT NOTE:
* Program	111 Format: 3 digit number ###		Remember to click "Save" after each
Date Funds End			
* Annual Amount	State Appropriated 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 dow saved entry to enter a new funding source. store and the Appropriated Funding Image: State Appropriated Funding with the approved position description, which you can edit as necessary. und 11111 Format: 5 digit number ##### unt 11111 Format: 3 digit number ##### unt 11111 Format: 3 digit number ##### unt 11111 format: 3 digit number ##### unt 1111 gram 1111 gram 1111 gram 1111 gram 1111 gram 1111 format: 3 digit number ##### 1111 gram 1111 gram 1111 gram 1111 gram 1111 indits End		
* Percentage of FTE	1.0	, and the second s	Inding
Remove Entry? Add Funding Source Details Entry	ntry	source, continue to click here until all	
		funding sources are entered.	Save << Prev Next>>

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

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

Editing Posting	Supplemental Questions			Save <> Prev Next >		
Posting Details		outton labeled "Add a	a Question". A pop up section will appear where	you can add an existing		
Position Funding Infor	question or create a new one.					
Supplemental Questions	Adding Existing Posting Questions: There are using the key word search or filter by guestion	for approved posting questions to add to the job	being posted. You can filter			
Applicant Documents	Assign Points or Disgualifying Responses: Click on the guestion that has been added and a dropdown menu will appear where points and					
References	disqualifying responses can be associated to			ppear where points and		
Search Committee			e posting, you will see a column of checkboxes t	to the left of each question;		
Ranking Criteria	checking these boxes will make a question re	quired.		_		
Posting Documents	Included Supplemental Questions		Click to add supplemental	Add a question		
Summary	Position Required Category	Question	Click to add supplemental	Status		
	-		questions.			

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

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

I		Question				×
ļ	Cateç	gory: Any Category	Veyword:			Filter supplemental questions by keyword or category.
l			How did you hear about this employ	ment opp	ortunity?	
IS		Experience	tistical record keeping			
		Education	Do you have a high school diploma	or equival	ent?	
L	Experience Do you have HR experience?					
L	Education Do you have a High School diploma?				V	
	Education Do you have a Master's Degree?					
		Education	Do you have a Master's Degree?			
		Experience	How many years of Accounting expo	erience do	you have in a higher edu	cation setting?
		Education	Do you have a High School diploma	1?	Click to submit a cu	ustom supplemental
L					question for review	v and approval.
	Dipla	aying all 10				
C	lick ch	eck box to a	dd an 🛛 🗖		Can't find the one ye	ou want? Add a new one
e	xisting	g supplement	al question.	Click Su finishe	ubmit when d.	Submit Cancel

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

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

Position	Required	Category	Question			Status	
1		Uncategorized	How did you hear about th	is employment opportunity?		active	
2		Experience	Do you have at least one y keeping experience?	rear of responsible payroll or financial and	statistical record	active	×
3		Education	Do you have a High Scho		ר	active	×
		Experience	How many years of Accou	Assign points to answers.	ucation setting?	active	×
Click t			Possible Answers: Predef	· · · · · · · · · · · · · · · · · · ·	s Disqualifying		
Click to make qu required.		ake questions	1. 0 years 2. 1-3 years 3. 4-5 years 4. 5+ years				
oordo	r question			Click to assign disqualifying			

<u>Create New Post Doctoral Posting from a Position Description –</u> <u>Applicant Documents Tab</u>

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

Editing Posting Posting Details		ncluded to make ding a document c	optional.	Click <u>both</u> Included <u>and</u> Required to make uploading a document required
Position Funding Infor		to make the document(s) man	· · · •	
Supplemental Questions	Order	Name	Included?	Required?
Applicant Documents	1	Resume		
References				
Search Committee	2	Cover Letter		
Ranking Criteria]		_	_
Posting Documents	3	Curriculum Vitae		
Summary	4	Teaching Philosophy		
	5	Letter Of Reference 1		
	6	Letter Of Reference 2		
	7	Letter Of Reference 3		

<u>Create New Post Doctoral Posting from a Position Description –</u> <u>References / Letters of Recommendation Tab</u>

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

ostings / Post Doctoral / Post Doctoral Re	search Associate (TLB40) (Draft) / Edit: References	
Editing Posting	References	Save << Prev Next >
Posting Details	Check spelling	
 Position Funding Infor Supplemental Questions 	Accept References: Please indicate whether or not you wish to require applicants to submit refer	ences with their application.
Applicant Documents	Minimum Requests: Please indicate the minimum number of references you would like applicant	
References	Maximum Requests: Please indicate the maximum number of references you would like applicant	nts to submit.
Search Committee	Cutoff Date: Please indicate the date by which reference information must be submitted.	
Ranking Criteria	* Required Information	
Posting Documents	References	
Summary	Accept References	
eference	Minimum Requests	mmandad range is 2 to 5
nformation may	Maximum Requests	mmended range is 3 to 5.
ot be submitted	Cutoff Date	
fter this date.	,	Save <> Prev Next

<u>Create New Post Doctoral Posting from a Position Description – Search</u> <u>Committee Tab</u>

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

In the **Search Committee** tab, you can assign search committee members who will have access to review application information for a specific posting. Search committee members can view applications, applicant documents, and evaluate / rank applicants based upon ranking criteria you establish as part of the posting. Requests to add search committee members will be reviewed and approved by the Division of human Resources (DHR) once the posting request is routed to DHR for approval. Upon DHR approving a search committee member's access, the search committee member will receive an e-mail notification with instructions on how to access the online posting and related application information:

Editing Posting	Search Committee Save <- Prev Next >
Posting Details	Search Committees are advisory in nature and serve the purpose of recruiting a qualified applicant pool, reviewing their credentials, and
Position Funding Infor	recommending acceptable candidates to the hiring manager. Search Committees can consist of University employees both internal and external
Supplemental Questions	to the hiring unit, as well as individuals external to the University who represent key stakeholders.
Applicant Documents	Search Committee Members
References/Letters of	No Search Committee Members have been assigned to this Posting yet.
Search Committee	Search
Ranking Criteria	Search
Posting Documents	Find a User to assign as a Search Committee Member.
Summary	
	First Name
	Last Name
	Email Address To search for a pre-approved search
	Search committee member, enter the name and click the Search button.

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

Search Committee Memb	pers		
No Search Committee Members	s have been a	Click the check box to assign the	
Search		search committee member as the committee chair.	
Find a User to assign as a Sear	ch Committee	e Memer.	
Name Email Address	Add Memb	er 🕂	
Lonnie Crotts emailaddress@zed.z	ed Add Mem	iber 🔲 Make Member The Committee Chair	
First Name Lonnie			
Last Name Crotts		e Add Member button to add	
Email Address	the sea searche	rch committee member you ed for.	
Search			

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

oose of serving as a Search Committee Member.	
a new Search Committee Member.	
To create an account for a new search committee member, complete	<< Prev Next >>

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

Mat	tching User						
Username	ambraun						
First Name	Amy						
Last Name	Braun	Click the Add User button to add the new					
Email Destanced Crow	emailaddress@zed.zed						
	atotus Associational and						
Add User		approved by DHR.					
Clear Matching U	leore	approved by DRK.					
Clear Matching C	13613						
New Search C	committee Member						
Request that some	eone be granted access to th	ne system for the purpose of serving as a Search Committee Membe	r				
	0						
Required fields are	e indicated with an asterisk (*).					
Account Informa	ation						
Please enter the	following information to cre	eate an account for a new Search Committee Member.					
* First Nam							
* Last Nam	e Braun						
* Email	ambraun@ncat.edu						
* Usernam	e ambraun						
Submit							
			Save	<< Prev	Next >>		

<u>Create New Post Doctoral Posting from a Position Description – Ranking</u> <u>Criteria Tab</u>

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

Editing Posting	Ranking Criter	ria		Save << Prev Next
 Posting Details Position Funding Infor 	experience and edu		nittees during the applicant review process to rank a ol can be helpful in identifying the most qualified can	
Supplemental Questions			abeled "Add a Criterion". A dialog box will appear wh	nere you can add an existing criterion b
Applicant Decumenta	checking the box in	the "Add" column or submit a n	ew one for approval.	
Applicant Documents	0.1 W. N. D			
 Applicant Documents References/Letters of 			ranking criterion for review and approval, click on th n the "Add a new one" link in the bottom right hand o	
		ative Criteria box opens, click of		
 References/Letters of 	the Available Evalua	ative Criteria box opens, click of		Corner.
 References/Letters of Search Committee 	the Available Evalua	ative Criteria box opens, click or ve Criteria	n the "Ădd a new one" link in the bottom right hand o	Corner.

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

Category: Any Add Category	Keyword: Description		Search for ranking criteria b keyword or category.
Uncategoriz	ed Rank Experience - 5 is Possible Answers: 1. 1 2. 2 3. 3 4. 4 5. 5	Indicate the appl	licant workflow state oplicant to be ranked.
	Applicant workflow s	Under Review by HR	
		ates experience related to th	Click to submit a custom ranking criterion for review and approval.

 Posting Details Position Funding Infor 	Ranking Criteria can be used used experience and education factors. criteria are not presented to the ap	This optional to the next tab.	xt to move	applicants	s based up n an applic		related I. Ranking
Supplemental Questions		k on the button labeled "Add a Criterion". A d mn or submit a new one for approval.	lialog box will appe	ar where you o	can add ar	n existin	ng criterion by
Applicant Documents		To submit a new ranking criterion for review a	and approval, click	on the button	labeled "A	dd a Cr	iterion" Whe
References/Letters of		ox opens, click on the "Add a new one" link in			labeleu A		Iteriori . Wilei
-							
	Included Evaluative Criteria						Add a Criterio
	Included Evaluative Criteria Category Description	on	Weight Workf	low State	Status		Add a Criterio
 Search Committee Ranking Criteria 	Category Description	on experience in a university		low State Review by HR	Status active	0	Add a Criterio
 Search Committee Ranking Criteria Posting Documents 	Category Descriptio Uncategorized Teaching of		Under			0	Add a Criterio
 Search Committee 	Category Descriptic Uncategorized Teaching of Uncategorized Please rat	experience in a university	Under Under	Review by HR	active		Add a Criterio

<u>Create New Post Doctoral Posting from a Position Description – Posting</u> <u>Documents Tab</u>

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

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

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

Editing Posting	Posting Documents	Save <> Prev Next >
Posting Details	To add a document to the posting, hover over the blue Action text link to the right of the d	document name.
Position Funding Infor	Documents can be uploaded by browsing for the document or a document can be written	
Supplemental Questions	supported as attachment include .doc, .docx, .pdf, .rtftty_tyt_tiff_tif_ipeg_ipg_ipg_ipg_ipg_ipg_ipg_ipg_ipg_ipg_ip	
Applicant Documents	PDF conversion must be completed for the docume Click "Actions", the	en select Upload New,
References/Letters of	Document Type Name Status (Actions) Create New, or Cho	oose Existing in order
Search Committee	Marketing Plan Actions to upload an attack	hment.
Ranking Criteria	Print Ad Text Upload New	
Posting Documents	Create New Choose Existing	Save <> Prev Next >
Summary	Complete this page	by clicking

<u>Create New Post Doctoral Posting from a Position Description –</u> <u>Summary Tab</u>

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

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

Postings / Post Doctoral / Post Doctoral Res	search Associate (TLB40) (Draft) / Summary					
Posting: Post Doctoral (Post Doctoral) Edit Current Status: Draft Position Type: Post Doctoral Section/Unit: VC for Human Resources	al Research Associate (TLB40) Created by: Linc Butter Owner: Linc Butter	Take Action On Posting ▼ ★ See how Posting looks to Applicant ➡ Print Preview (Applicant View) ➡ Print Preview				
Summary History Set	Summary History Settings Hiring Proposals Associated Position Description					
To take the action, select th you are ready to submit you To edit the posting, click on	Click "Edit" to make edits to a tab	ye to Edit. If a section has an orange icon with an exclamation point, you will need to review this section and				
Blue Circle Cheo	Post Doc Research Associate Post Doc Research Associate 81069	Tett side menu while modifying the Position.				
Classification Ty Minimum Experience/E						

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

Position Funding Information Edit	Click "Edit" to make edits to a tab.	
Budget Advisory Approval		
	sitions that are funded in whole or in part by general state fun mmittee's review process, state below what mission specific,	
Mission Specific, Essential and/or Key Objectives not Met without position		

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

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

ART STATE UNIVERSITY		Inbox Watch List	PeopleAdmin
	Home Postings Hiring Proposals My Profile	Help	
		Linc Butler, you have 0 messages. Supervisor	logout
Postings / Post Doctoral / Post Doctoral Research Associate (TLB4 Posting: Post Doctoral Research A (Post Doctoral) Edit Current Status: Draft Position Type: Post Doctoral Section/Unit: VC for Human Resources Summary History Settings Hiring Pr	Olick on "Take Action On Pending Request", then select approver to move the request to the next step in the approval workflow.	Canceled (move to Canceled	j)
and also add this posting to your Watch List. i box. To edit the posting, click on the Edit link next t	ly before continuing. flow Action by hovering over the orange "Take Action on this in the popup box that appears. When you are ready to submit you be the Section Name in the Summary Section. This will take you will need to review this section and make necessary correction	our posting, click on the Submit button on th ou directly to the Posting Page to Edit . If a	section has

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



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

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

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

NORTH CAROLINA A&T STATE UNIVERSITY	Watch List APPLICANT TRACKING
Home Postings Hiring Proposals	My Profile Help
	Linc Butler, you have 0 messages. Supervisor 💌 C logo
Green confirmation bar indicating the Pending	
Request was successfully transitioned and	
added to your Watch List.	

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

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

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

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

NORTH CAROLINA A&T STATE UNIVERSITY					Inbox Watch List	PeopleAdmin APPLICANT TRACKING
	Home Postings	Hiring Proposals	My Profile	Help	Hutch Eist	
				Linc Butler, you have 0 messages.	Supervisor	r C
stings / Post Doctoral / Post Doctoral Researc	h Associate (TLB40) (Draft) / Summary					
Posting: Post Doctoral I (Post Doctoral) Edit Current Status: Draft Position Type: Post Doctoral Section/Unit: VC for Human Resources	Research Associate (TLB4(Created by: Linc Butler Owner: Linc Butler))		Take Action On I WORKFLOW ACTI Keep working Canceled (mov Send to Depart Department He	ONS on this Posting re to Canceled tment Head (n	d)
Summary History Setting	Hiring Proposals Associated F	Position Description				
Please review the details of the	posting carefully before continuing.					
	ppropriate Workflow Action by hover ar Watch List. in the popup box that a					
	Edit link next to the Section Name in ation point, you will need to review this					

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

	L
ary	Take Action X
or (TLI	Keep working on this Posting Comments (optional)
	Enter comments if desired.
utler	-
	Add this posting to your watch list?
Submit	when complete
iore cont	inuina

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

Applicant Review

IMPORTANT NOTE: Prior to beginning applicant review, you must switch your user type to **Applicant Reviewer**. If you do not have the Applicant Reviewer user type in your drop down menu, contact a <u>Recruitment Coordinator</u>. To view applicants who have applied to a posting, go to the **Postings** tab and click on the position type in the drop down list that matches the posting you wish to view: **SHRA**, **EHRA**, **or Post Doctoral**. Since the **Applicant Review** process is identical regardless of position type, we will be using an **SHRA** posting for the purpose of this User Guide. The only notable difference in how applications are routed is:

- Applications for SHRA postings route to DHR first for initial screening to ensure State minimum education and experience requirements are met prior to being routed to the hiring
- Applications for EHRA and Post Doctoral postinggeroute directly to the hiring manager and are not pre-screened by DHR.

North Carolina A&T State University				Inbox Watch List	PeopleAdmin Applicant tracking
click SH	ostings tab, RA to view / pending SHF	SPA EPA Post Doctoral	Proposals My Profile Help Active user type is Applicant Reviewer.	Applicant	Reviewer 💽 C logout
Displaying items for group "A	ed your attention)	tion Management S	ystem	Shortcuts	
Job Title	Туре	Current State	Owner		
				My Links Useful Links Training Videos (Go here for helpful vid the use of PA7.)	deos for staff trainin1987

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

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

Applicant Review – Postings View

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

NORTH CAROLINA A&T STATE UNIVERSITY							leAdmin Cant tracking
^{tings / SPA} SPA Postings		Home	Postings Hiring Proposals My Prof	Active user Applicant f		Applicant Reviewer	C C
Onen Saved Search T Search:]	Search Mo	re search options	arches are c	ustomizable	by	
List of current / SHRA postings b	by active			osition attrib ved for later	utes and can use.	ı be	Actions
SHRA postings b Save Search: "Closed" (2) Kerns	by active	Position Number	sa	ved for later			
SHRA postings b Sat Search. "Closed" (2) Kins Working Title	by active	Position Number TLB11			use.	Last Updated	Actions (Actions) Actions
SHRA postings b Sat Search "Closed" (2) Kins Working Title	Posting Number		Department	ved for later	Workflow State		(Actions)
SHRA postings b Save Search "Closed" (2000 Working Title Employee Relations Counselor (TLB13)	Posting Number SPA048	TLB11	Department Employee Relations	Active Applications	Workflow State	Last Updated August 08, 2013 at 01:37 pm	(Actions) Actions •
SHRA postings b Save Search "Closed" (2000 Working Title Employee Relations Counselor (TLB13)	Posting Number SPA48 SPA45	TLB11 TLB13	Department Employee Relations Employee Relations	Active Applications	Workflow State Closed Closed	Last Updated August 08, 2013 at 01:37 pm August 08, 2013 at 10:30 am	(Actions) Actions▼ Actions▼
SHRA postings b Sat Search: Closed" (2) Lens Vorking Till Employee Relations Counselor (TLB1) Employee Relations Counselor (TLB1) Human Resources Specialis Administrative Support Assoc	Posting Number SPA048 SPA045 SPA045 SPA012	TLB11 TLB13 000066	Department Employee Relations Employee Relations Student & Foreign National Employment	Active Applications	• USE. Workflow State Closed Closed Closed	Last Updated August 08, 2013 at 01:37 pm August 08, 2013 at 10:30 am August 08, 2013 at 10:52 am	(Actions) Actions • Actions • Actions •
SHRA postings b Sav Search Closed" (24 Can Working Tile Employee Relations Counselor (TLB1) Employee Relations Counselor (TLB1) Human Resources Specialis Administrative Support Assoc	Posting Number SPA048 SPA048 SPA012 SPA012 SPA027	TLB11 TLB13 000066 000051	Department Employee Relations Employee Relations Student & Foreign National Employment Classification & Compensation	Active Applications	Workflow State Closed Closed Closed Closed	Last Updated August 08, 2013 at 01.37 pm August 08, 2013 at 10.30 am August 08, 2013 at 09.20 am August 08, 2013 at 09.10 am	(Actions) Actions v Actions v Actions v
SHRA postings b Sav Search "Closed" (210000 Working Tall Employee Relations Counselor (TLB13) Human Resources Specials Administrate Support Assoc Recruitment Assistant - 1	Posting Number SPA48 SPA45 SPA45 SPA027 SPA04	TLB11 TLB13 000066 000051 008	Department Employee Relations Employee Relations Student & Foreign National Employment Classification & Compensation Recruitment and Retention	Active Applications	Workflow State Closed Closed Closed Closed Closed	Last Updated August 08, 2013 at 01:37 pm August 08, 2013 at 01:30 am August 08, 2013 at 09:52 am August 08, 2013 at 09:51 am August 07, 2013 at 05:06 pm	(Actions) Actions v Actions v Actions v Actions v
SHRA postings b Save Search "Closed" (2004) Working Tile Employee Relations Counselor (TLB13) Human Resources Specialist Administrative Support Assoc Recutiment Aussistant - 1 Human Resources Specialist	Posting Number SPA048 SPA045 SPA05 SPA012 SPA027 SPA044 SPA041	TLB11 TLB13 000066 000051 008 LC0040	Sa Department Employee Relations Employee Relations Student & Foreign National Employment Classification & Compensation Recruitment and Relention Recruitment and Relention	Active Applications	Workflow State Closed Closed Closed Closed Closed Closed	Last Updated August 08, 2013 at 0137 pm August 08, 2013 at 1030 am August 08, 2013 at 0952 am August 08, 2013 at 00910 am August 07, 2013 at 6056 pm August 06, 2013 at 0145 pm	(Actions) Actions ▼ Actions ▼ Actions ▼ Actions ▼ Actions ▼
SHRA postings b Sature Search "Closed" (210000 Working Till Employee Relations Counselor (TLB11) Human Resources Specialist Administrative Support Assoc Recruitment Assistant - 1 Human Resources Specialist Employee Relations Counselor (TLB11) Employee Relations Counselor (TLB10)	Posting Number SPA048 SPA048 SPA042 SPA012 SPA012 SPA027 SPA044 SPA041 SPA039	TLB11 TLB13 000066 000051 008 LC00040 TLB11	Sa Department Employee Relations Employee Relations Student & Foreign Mational Employment Classification & Compensation Recruitment and Relemition Recruitment and Relemition Employee Relations	Active Applications	Vorkflow State Closed Closed Closed Closed Closed Closed Closed Closed	Last Updated August 08, 2013 at 0137 pm August 08, 2013 at 1030 am August 08, 2013 at 1052 am August 08, 2013 at 0050 pm August 07, 2013 at 0050 pm August 05, 2013 at 1044 pm August 06, 2013 at 1042 am	(Actions) Actions ♥ Actions ♥ Actions ♥ Actions ♥ Actions ♥ Actions ♥
SHRA postings b Save Search Closed (2000) Working Title Employee Relations Counselor (TLB11) Human Resources Specialis Administrative Support Assoc Recruitment Assistant - 1 Human Resources Specialist Employee Relations Counselor (TLB11) Employee Relations Counselor (TLB11) Employee Relations Counselor (TLB11)	Posting Number SPA48 SPA48 SPA45 SPA45 SPA45 SPA45 SPA45 SPA45 SPA44 SPA44 SPA44 SPA44 SPA44 SPA44 SPA44 SPA44 SPA43 SPA437	TLB11 TLB13 000066 000051 008 LC0040 TLB11 TLB10	Sa Department Employee Relations Employee Relations Student & Foreign National Employment Classification & Compensation Recruitment and Retention Recruitment and Retention Employee Relations	Active Applications	Vorkflow State Closed Closed Closed Closed Closed Closed Closed Closed Closed Closed	Last Updated August 08, 2013 at 01:37 pm August 08, 2013 at 01:37 lm August 08, 2013 at 00:52 am August 08, 2013 at 00:510 am August 07, 2013 at 00:50 pm August 06, 2013 at 01:45 pm August 06, 2013 at 10:42 am August 05, 2013 at 02:58 pm	(Actions) Actions ▼ Actions ▼ Actions ▼ Actions ▼ Actions ▼ Actions ▼ Actions ▼

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

NORTH CAROLINA A&T STATE UNIVERSITY						Inbox Peop	eAdmin
A&T STATE UNIVERSITY						Watch List APPLI	CANT TRACKI
		Home	Postings Hiring Proposals My Profi	le Help			
					Linc Butler,	you have 0 messages. Applicant Reviewer	• • (
tings / SPA							
Cipen Saved Search + Search:			of active applicants lied to each posting		Current w each post	orkflow state o ing.	f
Ad hoc Search Closed	0			I			Actions
Saved Search: "Closed" (21 Items	Found)						Actions
Saved Search: "Closed" (21 Items Working Title	Found) Posting Number	Position Number	Department	Active Applications	Workflow State	Last Updated	
		Position Number TLB11	Department Employee Relations	Active Applications	Workflow State Closed	Last Updated August 08, 2013 at 01:37 pm	(Action
Working Title	Posting Number		•			•	(Action Actions
Working Title Employee Relations Counselor (TLB11) Employee Relations Counselor (TLB13) Human Resources Specialist	Posting Number SPA048 SPA045 SPA045 SPA012	TLB11	Employee Relations Employee Relations Student & Foreign National Employment	10	Closed	August 08, 2013 at 01:37 pm	(Action Actions Actions
Working Title Employee Relations Counselor (TLB11) Employee Relations Counselor (TLB13)	Posting Number SPA048 SPA045	TLB11 TLB13	Employee Relations Employee Relations	10 1	Closed Closed	August 08, 2013 at 01:37 pm August 08, 2013 at 10:30 am	(Actions Actions Actions
Working Title Employee Relations Counselor (TLB11) Employee Relations Counselor (TLB13) Human Resources Specialist	Posting Number SPA048 SPA045 SPA045 SPA012	TLB11 TLB13 000066	Employee Relations Employee Relations Student & Foreign National Employment	10 1 0	Closed Closed Closed	August 08, 2013 at 01:37 pm August 08, 2013 at 10:30 am August 08, 2013 at 09:52 am	Actions Actions Actions Actions Actions Actions

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

Ad hoc Search (2 Items Fo	und) Save this sea	irch?					Actions
Working Title	Posting Number	Position Number	Department	Active Applications	Workflow State	Last Updated	(Actions
Employee Relations Counselor (TLB11)	SPA039	TLB11	Employee Relations	1	Closed	August 06, 2013 at am	10:42 Actions
Employee Relations Counselor (TLB11)	SPA048	TLB11	Employee Relations	10	Closed	August 08, 2013 at pm GENE	
							Posting 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.

Postin (SPA) Current S Position T	I g: Employe d tatus: Closed ype: SPA nit: Employee Relat		UNSEIOR (TLB11 y: Linc Butler ecruitment				★ See how Posting Print Preview (App Print Preview		
	to view	icants by applicati		Search More search options	Search appl by keyword		View attac applicant c		ents.
Actir .pplic	ants	0							
	d Search: "Activ	ve Applicants'' (10 l	tems Found)						Actions
- First		ve Applicants" (10 h	Last	Are you a layoff candidate with the State of N.C. eligible for RIF priority reemployment consideration as described by CS 1262	Are you currently employed by the state of North Carolina?	Do you wish to claim veferance?	Are you a veteran or spouse of a disabled veteran?	Documents	Actions (Actions)
	d Search: "Activ Last Name Split	ve Applicants'' (10 l		Are you a layoff candidate with the State of N.C. eligible for RIF priority reemployment consideration as described by GS 128?	Are you currently employed by the state of North Carolina? No	Do you wish to claim veteran's preferance?	Are you a veteran or spouse of a disabled veteran?	Documents Resume	
First Name	Last Name	ve Applicants" (10) Workflow State (Internal) Under Review by	Last Updated August 08, 2013 at		by the state of North Carolina?				(Actions)
First Name	Last Name Split	ve Applicants" (10 l Workflow State (Internal) Under Review by Dept/Committee Under Review by	Last Updated August 08, 2013 at 01:32 pm August 08, 2013 at		by the state of North Carolina? No				(Actions) Actions▼
 First Name Lickety John 	Last Name Split Smith	Ver Applicants" (10 P Workflow State (Internal) Under Review by Dept/Committee Under Review by Dept/Committee Under Review by	Last Updated August 08, 2013 at 01:32 pm August 08, 2013 at 01:32 pm August 08, 2013 at		by the state of North Carolina? No No				(Actions) Actions • Actions •

When you click on the name of an applicant, you will be taken to the **Job Application** view, where you can view all submitted information the applicant has provided, including personal information, educational history, employment history, reference information, answers to supplemental questions, and attached applicant documents. You can also view the posting the applicant applied to, preview the application, and evaluate the applicant by clicking on the links located in the top right-hand corner just below the orange **Take Action On Job Application** button. :

Postings	1 1 Employee Relations Counselor (TLB1	1) (Closed) / Applicant Review / B	Bruce Campbell Under Review by Dept/Committee			Search Results: Previous Next
	Job application: Bruce Car Current Status: Under Review by Dept/Cor Application form: Application		Applicant name and workflow status.		Take Action on Job Application button	Take Action On Job Application ▼
		Created by: Bruce Campbell Owner: Applicant Reviewer		J		Evaluate Applicant
	Username: bcampbell Email: tblate@sediad Phone (Primary): 336-336 Phone (Secondary): 336-8356 Phone (Secondary): 336-8356 Phone (Secondary): 336-8356 Phone (Secondary): 336-8356 Section/Unit: Employee Relations Summary Recommendations (0 of 2) © Personal Information) History Reports				Click to View Posting Applied To, Preview Application, or Evaluate Applicant.
	Contact Information			Scr	oll to view all	
	First Name Middle Name (enter NMN if no	Bruce			blication information	
	middle name) Last Name	Campbell				•
	Suffix					
	Last 4 Digits of Social Security Number	5555				
	Address1	107 Elm St.				
	Address2					

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

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:

				Linc Butler, you have 0 messages.	Applicant Reviewer	▼ ¢ lo
Posting	s / / Employee Relations Counselor (T	LB11) (Closed) / Applicant Review / B	ruce Campbell Under Review by Dept/Committee		Search Resul	ts: Previous Nex
	Job application: Bruce C Current Status: Under Review by Dept Application form: Application Full name: Bruce Campbell Address: 107 Elm St. Greensboro , NC United States of America Username: bcampbell Email: tbutter@zed.zed Phone (Primary): 336-336-3336	•	Change the workflow state of an applicant by selecting the most appropriate action in this list.	Take Action On J WORKFLOW ACTIO Keep working o application Not Selected fon Select to Intervi Interview)	n this Job r Interview (move to r Interview)	
	Phone (Secondary): 336-285-2222 Position Type: SPA Section/Unit: Employee Relations					

If you change an applicant's workflow state to **"Not Selected for Interview (move to Not Selected for Interview)"**, you will be <u>required</u> to select the most appropriate non-selection reason for that applicant. Once an applicant's workflow status is changed to **"Not Selected for Interview (move to Not Selected for Interview)"**, the applicant is moved to an inactive status and their name will be removed from the applicant list on the **Applicants** tab:

			Line Butler, you have o messages. Applica
Take Action	Revi	ake Action 🗙	
Not Selected for Interview (move to Not Selected for Interview)	Not	t Selected for Interview (move to t Selected for Interview) ason (required)	Take Action On Job Applic
	Ple	ase select	Preview Application
Reason (required)	iewei Av. Av. Ba Exi Exi Ed Re Re Re	perience - Sufficient Experience but less th ucation - Does not meet educational requir ucation - Could perform duties only with ex	work history r competency requirements of the position. an selected candidate. ements of the position. Attensive training and orientation period. insufficient education and/or work experien- unacceptable work history. job duties

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"**.

	plicants" (10 Items Found)						Actions drop down menu.			GENERAL	Actions
V	First Name	Last Name	Workflow State (Internal)	Last Updated	Are you a layoff candidate with the State of N.C. eligible for RIF priority reemployment consideration as described by GS 126?	Are you currently en the state of Carolina?	ployed by	wish to claim veteran's preferance?	a veteran or of a disabled veteran?	Evaluate Applicants Download Applicant Evaluations	
/	Lickety	Split	Under Review by Dept/Committee	August 08, 2013 at 01:32 pm		No				Review Screening C Answers Download Screening Question Answers	
7	John	Smith	Under Review by Dept/Committee	August 08, 2013 at 01:32 pm		No	Click N	Nove in	1	Export results BULK Move in Workflow	
/	Gabbie	Union	Under Review by Dept/Committee	August 08, 2013 at 01:32 pm			Workf			Download Application PDF Create Document Pl	
/	Lola	Fairweather	Under Review by Dept/Committee	August 08, 2013 at 01:32 pm		No				Applicant	
1	Bruce	Campbell	Under Review by Dept/Committee	August 08, 2013 at 01:32 pm		No		No	No	Resume	Actions
7	Beyonce Knowles	Knowles	Under Review by Dept/Committee	August 08, 2013 at 01:32 pm		Yes					Actions

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

Editing: Workflow States for a	Applicants		
	Change for all applicants	Select a worknow state	appropriato ow state.
Applicant		Interview	Reason
Lickety Split	Under Review by Dept/Committee	Select a workflow state	
John Smith	Under Review by Dept/Committee	Select a workflow state	
Gabbie Union	Under Review by Dept/Committee	Select a workflow state	
Lola Fairweather	Under Review by Dept/Committee	Select a workflow state	
Bruce Campbell	Under Review by Dept/Committee	Select a workflow state	
Beyonce Knowles Knowles	Under Review by Dept/Committee	Select a workflow state	
Katherine Jackson	Under Review by Dept/Committee	Select a workflow state	
Diana Ross	Under Review by Dept/Committee	Select a workflow state	
Save changes Or Cancel			

If you change the applicant group's workflow state to **"Not Selected for Interview (move to Not Selected for Interview)"**, you will then be <u>required</u> to select the most appropriate non-selection reason for the applicant group. Once an applicant's workflow status is changed to **"Not Selected for Interview (move to Not Selected for Interview)"**, the applicant is moved to an inactive status and their name will be removed from the applicant list on the **Applicants** tab:

	rkflow States for	8 Applicants	Select the appropriate non-selection reason for the applicant group.			
Change f	for all applicants	Not Selected for Interview	Please select Please select Availability - Unable to contact.			
Applicant	Current State	New State	Availability - Onable to contact. Availability - Withdrew from consideration. Availability - Accepted other employment.			
Lickety Split	Under Review by Dept/Committee	Not Selected for Interview	Background Check - Candidate did not pass criminal background check process. Experience - Application shows unacceptable work history. Experience - Does not meet experience and/or competency requirements of the position.			
John Smith	Under Review by Dept/Committee	Not Selected for Interview	Experience - Sufficient Experience but less than selected candidate. Education - Does not meet educational requirements of the position. Education - Could perform duties only with extensive training and orientation period. References - Reference information indicates insufficient education and/or work experience.			
Gabbie Union	Under Review by Dept/Committee	Not Selected for Interview	References - Reference information indicates insufficient education and/or work experience. References - Reference information indicates uncertainteen education and/or work experience. References - Unable to contact. References - References not compatible with job duties			
Lola Fairweather	Under Review by Dept/Committee	Not Selected for Interview	Priority Selection - Selected candidate with layoff priority.			
Bruce Campbell	Under Review by Dept/Committee	Not Selected for Interview	Please select			
Beyonce Knowles Knowles	Under Review by Dept/Committee	Not Selected for Interview	Please select			

Change for	all applicants Not Selected		or all applicants in the group.	
Applicant	Current State	New State	Reason	
Lickety Split	Under Review by Dept/Committee	Not Selected for Intervie	V Experience - Sufficient Experience but less than selected candidate.	V
John Smith	Under Review by Dept/Committee	Not Selected for Intervie	V Experience - Sufficient Experience but less than selected candidate.	
Gabbie Union	Under Review by Dept/Committee	Not Selected for Intervie	V Experience - Sufficient Experience but less than selected candidate.	T
Lola Fairweather	Under Review by Dept/Committee	Not Selected for Interview	V Experience - Sufficient Experience but less than selected candidate.	▼
Bruce Campbell	Under Review by Dept/Committee	Not Selected for Intervie	v Experience - Sufficient Experience but less than selected candidate.	T
Beyonce Knowles Knowles	Under Review by Dept/Committee	Not Selected for Intervie	V Experience - Sufficient Experience but less than selected candidate.	▼
Katherine Jackson	Under Review by Dept/Committee	Not Selected for Interview	V Experience - Sufficient Experience but less than selected candidate.	•
Diana Ross	Under Review by Dept/Committee	Not Selected for Interview	Experience - Sufficient Experience but less than selected candidate.	•

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

	Editing: Workflow S	states for 8	Applicants			
	Change for all applicants		Not Selected for In	terview 💌 Experience -	Sufficient Experience but less than selected candidate.	
	Applicant	Current St	ate	New State	Reason	
	Lickety Split	Under Revi	ew by	Not Selected for Interview	Experience - Sufficient Experience but less than selected candidate.	▼
ir	lick to change ndividual workf tates.		v by tee v by tee v by tee v by tee v by tee	Interview Select a workflow state Not Selected for Interview Interview Not Selected for Interview Not Selected for Interview Interview Interview	Experience - Sufficient Experience but less than selected candidate. Experience - Sufficient Experience but less than selected candidate. Experience - Sufficient Experience but less than selected candidate.	¥ ¥
	Diana Ross	Under Revi Dept/Comn		Not Selected for Interview	Experience - Sufficient Experience but less than selected candidate.	V
	Save changes		Click to Sav	ve Changes.		

Applicant Review – Routing your Selected Candidate for Approval

Once you have completed interviews, checked references, and identified a selected candidate, you can then route your selected candidate through the candidate approval workflow within your School, College, or Division to the EEO Approval workflow state. You must first change the workflow state of all nonselected applicants from the workflow state of "Interview" to the workflow state of "Interviewed, Not Hired (move to Interviewed, Not Hired)". To do this, hover your cursor over the Take Action On Job Application button located in the top right-hand corner of the non-selected applicant's Job Application view and select "Interviewed, Not Hired (move to Interviewed, Not Hired)". You will then be required to select the most appropriate non-selection reason for that applicant. Once an applicant's workflow status is changed to "Not Selected for Interview (move to Not Selected for Interview)", the applicant is moved to an inactive status and their name will be removed from the applicant list on the Applicants tab: 203

Click name to view application.										
🗆 I t Name	Last Name	Workflow State (Internal)	Last Updated Are you a layoff candidate with the State of N.C. eligible for RIF priority reemployment consideration as described by GS 126?	Are you currently employed by the state of North Carolina?	Do you wish to claim veteran's preferance?	Are you a veteran or spouse of a disabled veteran?	Documents	(Actions)		
I John	Smith	Interview	Remaining	No				Actionsv		
Bruce	Campbell	Interview	Augus applicants are in pm the workflow	No	No	No	Resume	Actions ▼		
Katherine	Jackson	Interview	state of Interview.	No				Actions •		



	reason is	Interviewed, Not Hired)	
Reason (required)	required.	Reason (required)	🟦 View Posting Applied To
Please select	Cancel	Please select Please select Declined Offer - Other employment. Declined Offer - Salary. Interview - Interview showed inconsistency Interview - Interview showed lack of effect Interview - Interview showed lack of suffic Interview - Interview showed lack of under Interview - Interview showed lack of under Interview - No show. Priority Selection - Selected candidate with	ive communication skills. ient directly related experience and/or education. rstanding of scope of position's duties.

You can then route the selected candidate to the next step in the candidate approval workflow by hovering your cursor over the **Take Action On Job Application** button located in the top right-hand corner of the selected candidate's Job Application view and selecting the appropriate next step. In this example, the next step in the workflow is **Send to Dean / Vice Chancellor.** You will then be required to enter comments describing why the selected candidate was the most qualified candidate in the applicant pool:



vi	Take Action	×	Revi	Take Action
Ì	Send to Dean/Vice Chanc to Dean/Vice Chancellor)	-		Send to Dean/Vice Chancellor (move to Dean/Vice Chancellor) Reason (required)
	Reason (required)	Selection	pbe	Enter Comments
	Please select	reasons are required.	er (Explanation:
ver			1	Ţ
L	Submit	Cancel		Submit Cancel

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

Posting	gs / / Employee Relations Counselor (1	LB11) (Closed) / Applicant Review / Bruce	Campbell Dean/Vice Chancellor		
	Job application: Bruce C Current Status: Dean/Vice Chancellor Application form: Application Full name: Bruce Campbell Address: 107 Elm St. Greensboro , NC United States of America Username: bcampbell Email: tlbutler@zed.zed Phone (Primary): 336-336-3336 Phone (Secondary): 336-285-2222 Position Type: SPA Section/Unit: Employee Relations	Campbell (SPA) Created by: Bruce Campbell Owner: Dean/Vice Chancellor	_	Take Action On Job Application WORKFLOW ACTIONS Keep working on this Job application Return to Interview (move to Interviewed, Not Hired (move to Interviewed, Not Hired) Send to EEO Review (move to EEO Review)	



Hiring Proposal

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

Postings / / Employe	ee Relations Counselor (TLI	B11) (Closed) / Applicant Review / Bruce	e Campbell Recommend for Hire		
Current Status	cation: Bruce Ca s: Recommend for Hire rm: Application	ampbell (SPA)	_	*	View Posting Applied To
Full name: Brue	ce Campbell	Created by: Bruce Campbell			
Address: 107 Elm St.		Owner: Applicant Reviewer			
Greensboro , I United States					our rinning ropodu
Username: bca					
Email: tlbutler(Phone (Primary	@zed.zed y): 336-336-3336				
Phone (Second	dary): 336-285-2222				
Position Type: Section/Unit: E	SPA mployee Relations				

Then select the position description you would like to hire the selected candidate into from the list displayed on the Selected Position Description page. You can search for the desired position description by keyword or position attributes including but limited to position title, position number, and position status:

 elected Position Description Accounting Manager 	'n							
Position Descriptions Open Saved Search · Search: SPA Position Descriptions" (32 Items Found) Search for the position you wish to hire the selected candidate into by keyword.								
Saved Search: "SPA Pos	ition Descriptions" (32 It	ems Found)	← Pr		ate into by ke	yword.		
Saved Search: "SPA Pos Working Position Title	ition Descriptions" (32 It	ems Found) Employee First Name	← Pr			supervisor	Status	(Actions
				evious 1 2 Next→	-		Status Active	(Actions
Working Position Title	Position Number	Employee First Name	Employee Last Name	evious 1 2 Next → Position/Classification Title	Department	Supervisor		•
Working Position Title Administrative Support Spec	Position Number 000018	Employee First Name Belinda	Employee Last Name Macklin	evious 1 2 Next → Position/Classification Title Administrative Support Spec	Department HR Systems	Supervisor Asst VC-Human Resources (Linc Butler)	Active	Actions Actions
Working Position Title Administrative Support Spec Human Resources Specialist	Position Number 000018 000025	Employee First Name Belinda Ester	Employee Last Name Macklin Jones	evious 1 2 Next → Position/Classification Title Administrative Support Spec Human Resources Specialist	Department HR Systems Benefits	Supervisor Asst VC-Human Resources (Linc Butler) Human Resources Consultant (Nanta Cole)	Active Active	Actions
Working Position Title Administrative Support Spec Human Resources Specialist Human Resources Consultant	Position Number 000018 000025 000033	Employee First Name Belinda Ester Nanita	Employee Last Name Macklin Jones Cole	evious 1 (2) Next → Position/Classification Title Administrative Support Spec Human Resources Specialist Human Resources Consultant	Department HR Systems Benefits Benefits	Supervisor Asst VC-Human Resources (Linc Butler) Human Resources Consultant (Nanta Cole) Asst VC-Human Resources (Linc Butler)	Active Active Active	Actions Actions Actions

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

Postings / / Applicant Review / Bruce Campbell (Recommend for Hire) / New Hiring Proposal									
Selected Position Description									
Accounting Manager									
Position Description	s								
First click here. Search: TLB11 More search options Ad hoc Search SPA Position Descriptions									
Working Position Title	Position Number	Employee First Name	Employee	e Position/Classifi	cation Title	Department	Supervisor	Status	(Actions)
Employee Relations Counselor (TLB11)	TLB11	Then click he	re.	Human Resource	s Specialist	Employee Relations	Asst VC-Human Resources (Linc Butler)	Active	Actions
Select Position Description			с.						

Hiring Proposal – Hiring Proposal Tab

You will then be taken to the **Edit Hiring Proposal** view and can begin completing all required fields on the **Hiring Proposal** Tab. Information from the selected candidate's application, the posting, and the position description will be copied into the **Hiring Proposal** tab. Once all required fields are complete, click **Save** or **Next**:

Editing Hiring Proposal	Hiring Proposal		Sa	ve and Next b	outtons.		Savo Mostaa
	ming Proposal				-		Save Next >>
Hiring Proposal Hiring Proposal Summary	Check spelling						
Thing Toposal Summary	* Required Information						
	Candidate Information						•
	First Name	Bruce		The Selecte	d Candida	to's	
	Middle Name	Ashley					
	Last Name	Campbell		application		UII	
	Primary Phone	336-336-3336		will be copi	eu m.		
	Email	tlbutler@zed.zed					-
	Social Security Number	5555					
	Date Of Birth	09/10/1971					
Position Information							
Positon Title	Employee Relations Cou	unselor (TLB11)	Positio	n description		٦	
Posting Number	SPA048			ation will be o	copied in.		
Classification Type	SPA						
Approved Competency Level	Journey						
Primary Purpose of Position	Test						
Approved Salary	\$45,000						
Has the University's EEO Policy been followed in the recommendation of applicants for this position and documentary evidence to support this decision been filed with the Division of Human Resources?	Yes No This field is required.		Require	ed field.			
Is this position assigned to the Department of Athletics or involved or associated with athletics, including but not limited to, responsibility for admission, certification of academic standing, evaluation of academic performance and administration of financial aid for student athletes?	No						

Funding Source Detail									
Indicate the funding source(s) for this position. Click on "Add Funding Source Details Entry" to enter budget and other required codes. Select "SAVE" after each entry. Please note that the annual amount budgeted must equal the requested salary.									
	an one funding source, continue to select "Add saved entry to enter a new funding source.	Funding Source Details Entry" and "Save" until all sources are	e entered. Each time you add an additional entry, you will need to						
State Appropriated * Funding / Non-State Appropriated Funding	State Appropriated Funding	Funding Source information							
If non-state, select source of funding:	Please select	will be copied in from the Position description and can							
lf other, designate source		be edited.							
Is this position partially or fully funded on ARRA stimulus monies?	No 💌	L							
* 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 Ent	ny								

H	liring Proposal Information			
*	Reason For Selection of Candidate		This field is re	Include detailed, job-related selection reasons describing why the selected candidate was the most qualified candidate in the applicant pool.
	Start Date		_	
	Actual Starting Salary			
*	Is Background Check Required?	This field is required.]	
*	Is Background Check Complete?	This field is required.		Ensure all other required fields are complete, then click Save or Next.
*	Please Provide Any Background Check Detail		▲ This field is rec	
	Hiring Proposal Number			
*	Have references been checked?	Image: Second state No This field is required. Second state		
*	Is Nepotism Certificate Required? If yes, please attach.	Ses ● No This field is required.		
				Save Next >>

Hiring Proposal – Hiring Proposal Summary Tab

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

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

SPA / / Bruce Campbell (Recommend for Hire) / Hiring Proposal / Summary							
Hiring Proposal: Bruce Current Status: Draft Position Type: SPA Section/Unit: Employee Relations Applicant: Emroloyee Relations Counselor (TLB1) Summary History Settint	Created by: Linc Butler Owner: Linc Butler	Take Action On Hiring Proposal + WORK-LOWACTIONS Keep working on this Hiring Proposal Send to Department Head (move to Department Head)					
Hiring Proposal Edit Candidate Information	Click "Edit" to make edits to a ta	ab.					
	Bruce						
Blue Circle Check	Ashley						
Last Name	Campbell						
Primary Phone	336-336-						
Email	tlbutler@zed.zed						
Social Security Numb	5555 5555						
Date Of Birth	09/10/1971						

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

Position Funding Information Edit	Click "Edit" to make edits to a tab.	
Budget Advisory Approval		
	A positions that are funded in whole or in part by general state f ie Committee's review process, state below what mission specif	
Mission Specific, Essential and/or Key Objectives not Met without position		

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

SPA /	PA / / Bruce Campbell (Recommend for Hire) / Hiring Proposal / Summary Hiring Proposal: Bruce Campbell (SPA) E Current Status: Draft Position Type: SPA Section/Unit: Employee Relations Applicant: Bruce Campbell Posting: Employee Relations Counselor (TLB11)		Click on "Take Action On Hiring Proposal", then select routing action to move the request to the next step in the approval workflow.	Take Action On Hiring Proposal - WORKFLOWACTIONS Keep working on this Hiring Proposal Send to Department Head (move to Department Head)
	Summary History Settings Hiring Proposal Edit Candidate Information			209

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



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

"Reason For Selection of Candidate" is required and All required fields must be set before transitioni	ing.	8
Age State University	Watch List AF	PPLICANT TRACKING
Home Postings Hiri	ing Proposals My Profile Help	
Red bar indicating the required fields that	Linc Butler, you have 0 messages. Supervisor	C logout
need to be completed before submitting the request to the next step in the workflow.	Take Action On Hiring Proposal +	

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

1 Hiring Proposal was successfully transitioned		8
NORTH CAROLINA ALT STATE UNIVERSITY	Watch List	APPLICANT TRACKING
Home Postings Hiring Proposals My Profile Help		
	Linc Butler, you have 0 messages. Supervisor	C logout
Green confirmation bar indicating the Pending Request was successfully transitioned and added to your Watch List.	A Print Preview	
Applicant Bruce Campbell Posting: Employee Relations Counselor (TLB11)		

The next level approver (the Department Head in this example) will receive the pending Hiring Proposal request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable). Once the Hiring Proposal has been approved at all levels within your Division, School, or College, the next step in the approval workflow is to route the Hiring Proposal to Recruitment:

NORTH CAROLINA ART STATE UNIVERSITY					Inbox PeopleAd Watch List APPLICANT	IMIN I TRACKING 🔻
	Home Postings	Hiring Proposals	My Profile	Help		
				Linc Butler, you have 0 messages.	Dean/Vice Chancellor	C logout
SPA / / Bruce Campbell (Recommend for Hire) Hiring Proposal: Bruce Current Status: Dean/Vice Chancellor Position Type: SPA Section/Unit: Employee Relations Applicant: Bruce Campbell Posting: Employee Relations Counselor (TLB11) Summary History Setting Hiring Proposal Edit	Campbell (SPA) Edit Created by: Linc Butler Owner: Dean/Vice Chancellor			Take Action On H WORKFLOW ACTO Keep working o Proposal Send to Recruit (move to Make	n this Hiring ment to Make Offer	

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

	Take Action		
Edi cell	Send to Recruitment to Make Offer (move to Make Offer)	viev	nments are optional and can be ved by the next level approver ne History tab.
	Add this hiring proposal to your watch list?		Adding the action to your Watch List allows you to easily track and monitor the action's progress.

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

🚯 "Reason For Selection of Candidate" is required and All required fields must be set before transitioning.					
(Watch List)	APPLICANT TRACKING				
ing Proposals My Profile Help					
Linc Butler, you have 0 messages. Supervisor	C logout				
Take Action On Hiring Proposal +					
	Watch List				

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

Hiring Proposal was successfully transitioned		8
NORTH CAROLINA A&T STATE UNIVERSITY	Watch List	APPLICANT TRACKING
Home Postings Hiring Proposals My Profile Help		
	Linc Butler, you have 0 messages. Superviso	logout
Green confirmation bar indicating the Pending Request was successfully transitioned and added to your Watch List.	A Print Preview	
Applicant: Bruce Campbell Posting: Employee Relations Counselor (TLB1)		

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

Hiring Proposal - Saving to Return to a Pending Request Later

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

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



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

Take Action	×				
Keep working on this Hiring Proposal					
Comments (optional)	Enter comments if desired.				
Add this hiring proposal	to your watch list?				
Submit when complete.					
	Comments (optional)				

The **Hiring Proposal** can be located when you log into the Applicant Tracking module again as the same **User Type** you used to begin the action.