



Northeastern PeopleAdmin

Position Management, Requisitions,
Postings and Applicant Tracking System

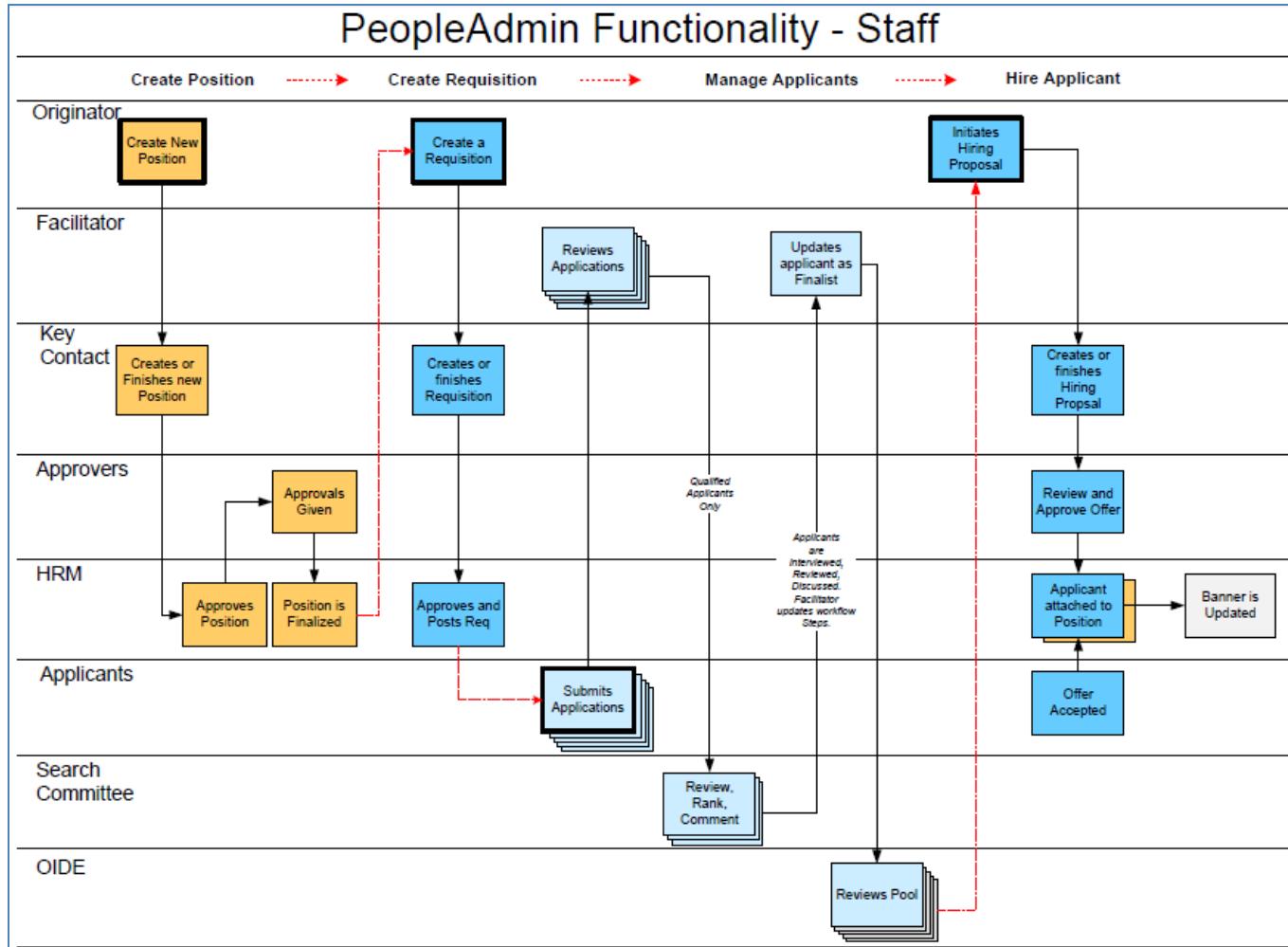
End User Guide

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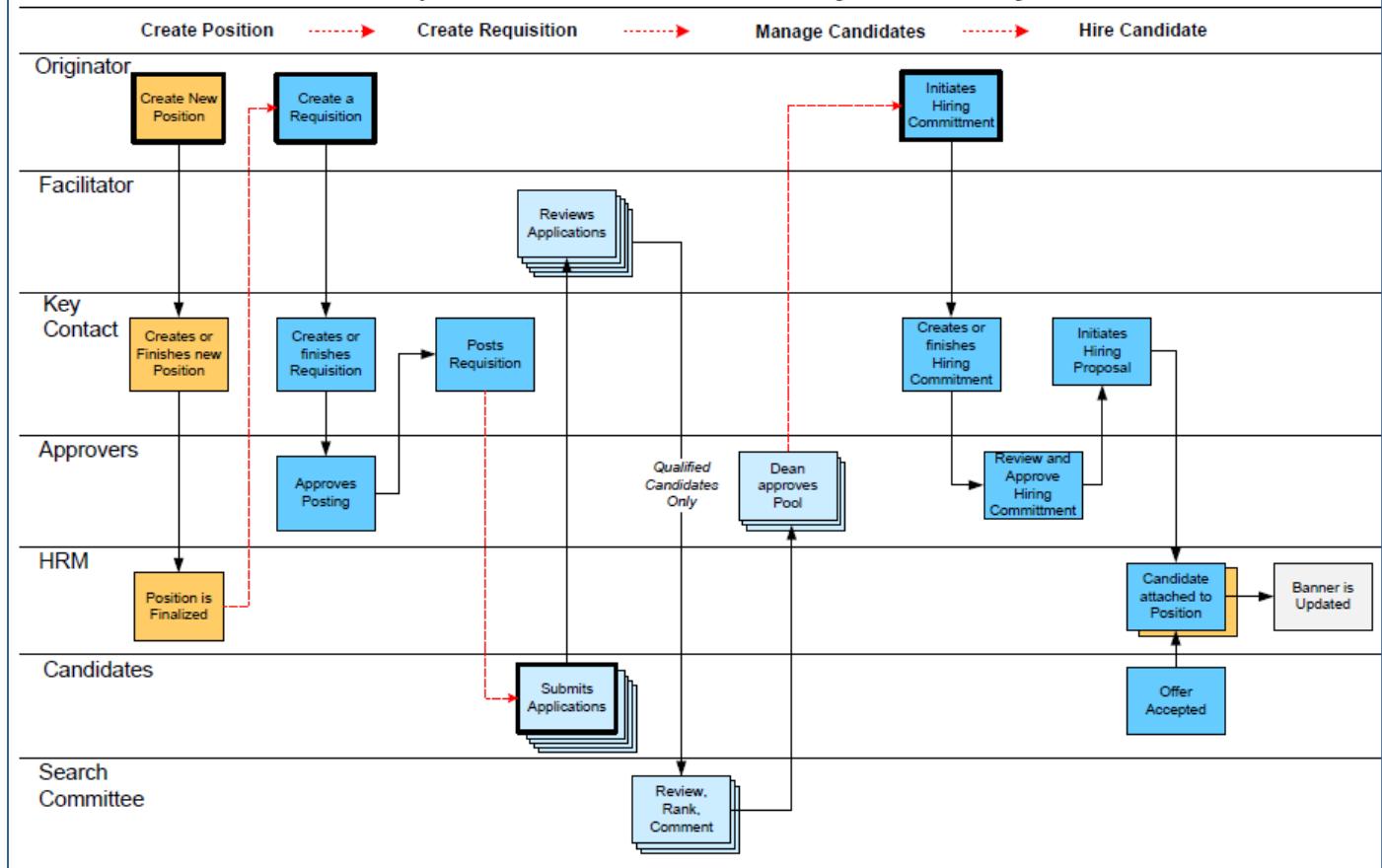
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High Level Process Overviews



PeopleAdmin Functionality - Faculty



Navigation in PeopleAdmin

Browser Note: PeopleAdmin has been tested on many browsers. You may experience slightly different behaviors between browsers and you can use the browser that you prefer.

Home Page Content

1. **Product Module** – Press this button to toggle between Position Management and Applicant Tracking. When you are in the Position Management Module, the header will be orange; and in the Applicant Tracking module, the header will be blue
2. **Role Selector** – Use the drop down to change your role. Then press the Refresh button.  You will know that you have successfully changed roles when you see a green bar with a ‘success’ message. Click the x icon to close this green bar
3. **Inbox** – Stores actions that reach you as part of the Workflow. Opening the Inbox using this icon will show an expanded view of the information in the Inbox. You can also see your Inbox as a window within the Home Page.
 - In eRecruit, this was called a Worklist. Items in your inbox require an action on your part; it is likely to be an action requiring your approval.
 - Inbox is organized in tabs (Requisitions, Hiring Proposals, Actions and Special Handling Lists)
 - You can easily access the specific item directly via the inbox, review, and select the next step in the workflow; without navigating elsewhere in PeopleAdmin to locate your action items.
 - You will also receive an email in your regular NEU Outlook program to alert you that something new is in your PeopleAdmin Inbox
4. **Watch List** – Stores Positions, Requisitions and Hiring Action items that you choose to ‘watch’. Opening the Watch List using this icon will show an expanded view of the information in the Inbox. You can also see your Watch List as a window within the Home Page.
 - For example, when you create a Requisition and send it to the next step in the Workflow, at that time you would want to elect to include this Requisition in your Watch List. That way you can monitor the subsequent approvals and actions.
5. **Messages** – Only used if you run reports in PeopleAdmin.
6. **Shortcuts** (Window content managed by System Admin)
7. **My Links** (Window content managed by System Admin)

Product Module:
(Position Mgmt or Applicant Tracking)

Inbox | **PeopleAdmin** | POSITION MANAGEMENT ▾

Watch List

Home | Positions | Position Classes | My Profile | Help

Jill Smith, you have 6 messages. Key Contact logout

Messages: Relevant only to Reports that have been run

Role Selector

Refresh Role

Welcome to your Online Recruitment System

Alerts: (1 alert from the administrator)

Alerts: Notices posted by the Administrator

Inbox: Actions that reach you as part of the Workflow.

Inbox: (4 items need your attention)

Displaying items for group "Key Contact".

Requisitions (0) | Hiring Proposals (2) | Actions (2) | Special Handling Lists (0)

Job Title	Type	Current State	Owner

Watch List: You choose what you want to 'Watch'.

Watch List: (32 items)

Requisitions (13) | Hiring Proposals (0) | Actions (19)

Job Title	Type	Current State	State Owner
Sr. Academic Coordinator	Staff	HR Employment	HR Employment
Associate Professor	Full-Time Faculty	Posted	Key Contact
Test_Distinguished Prof & Chair	Full-Time Faculty	Posted	Key Contact
Test_PT Lecturer	Part-Time Faculty	Posted	Key Contact
Lecturer	Part-Time Faculty	Posted	Key Contact

Shortcuts

- Create New Staff Requisition
- Create New Full-Time Faculty Requisition
- Create New Part-Time Faculty Requisition

My Links

Useful Links

- Training Videos**
(Go here for helpful videos for staff training on the use of PA7.)
- Your Applicant Portal**
(How Applicants access your PeopleAdmin system)
- PeopleAdmin MOPAC - Customer Portal Login**
(best practice library, customer support portal, customer community)

PeopleAdmin | Talent Management Made Easy | Copyright 2011 All Rights Reserved. | Help

Position Management

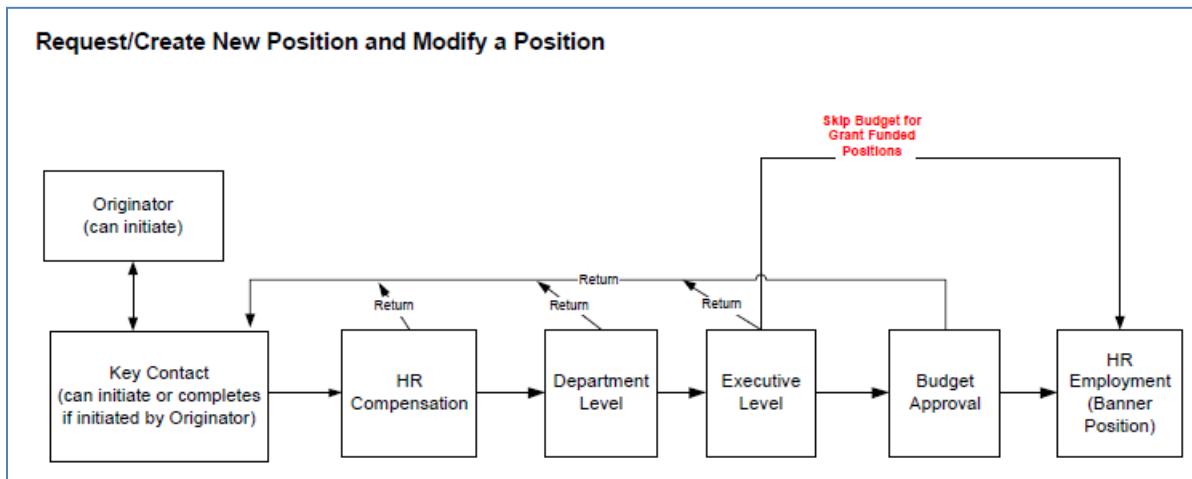
Staff

The four (4) forms used in the past (Position Management Activity form (PMA), HR/Comp Memo, HR/Comp Evaluation Memo, the Job Scope Description (JSD) and the Position Content Document (PCD) have been replaced with a **single online form found in PeopleAdmin**.

Create a New Staff Position

A new Position can be initiated by an Originator or a Key Contact. If you create a Position in the role of an Originator, the Position will go to the Key Contact next, and then the Key Contact will send it to HR Compensation (HRC). HRC will review and make any appropriate adjustments to the attributes of the Position before forwarding it to the next step in the Workflow. The users in the subsequent workflow steps cannot edit the Position; these users must send it ‘backward’ to the Key Contact.

The Key Contact will receive an email when HRC sends it ‘forward’ to the next step in the workflow. Each user in the workflow steps will receive an email when the action has been forwarded to them. The initiator will receive an email at the end of the process when the action has been Approved.



Steps to Create a Staff Position

1. Select the Product Module of Position Management
2. Select the Role of Originator or Key Contact
3. Select the Positions tab, and choose Staff.
 - Staff = View the Positions Library, and Create Positions.
 - ✓ You must go to the Library to initiate a 'modify transaction' or look at existing Positions in your Division.
 - Staff Actions = List of transactions that you have created.
 - ✓ You must go to Actions to determine the status of an existing transaction.
 - Faculty choices – see Faculty section.



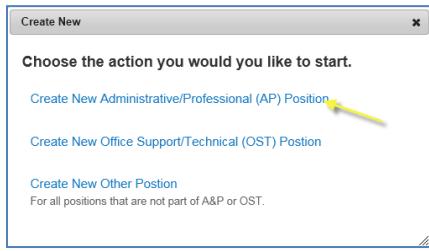
4. The Positions Library appears next. Press the Create New Position button

The screenshot shows the Staff Positions library page with the following elements:

- Header: Positions / Staff, Home, Positions (highlighted with a yellow box and arrow), Position Classes, My Profile, Help.
- User info: Jill Smith, you have 0 messages, Key Contact, logout.
- Title: Staff Positions.
- Search bar: Open Saved Search ▾, Search: [text input], Search, More search options.
- Search results: Ad hoc Search (18 Items Found), Save this search?.
- Table header: Position Number, Position Title, Department, Employee Last Name, Employee First Name, (Actions).
- Table data:

Position Number	Position Title	Department	Employee Last Name	Employee First Name	(Actions)
2011005PD	Academic Coordinator	Accounting Group (119200)			Actions ▾
2011006PD	Administrative Assistant	Accounting Group (119200)			Actions ▾
2011004PD	Administrative Assistant - CBA	Accounting Group (119200)			Actions ▾
- Text overlay: Below are the Positions in the Library.
- Buttons: Create New Position (highlighted with a yellow box and arrow).

5. A window appears next with 3 choices. In this example we will select Administrative/Professional Position. The choice you make here determines which Form you will be using. This is a comprehensive form combining the Job Description, the PMA, and the HR Comp Memos.



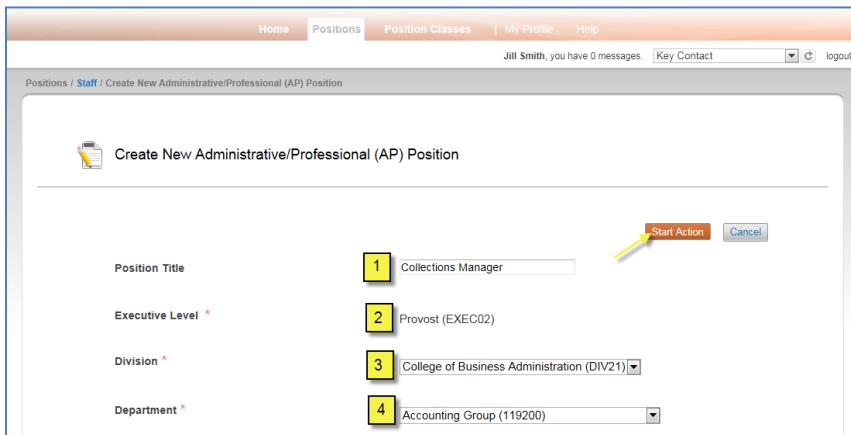
Choices in the Create New window:

- **Create new Administrative/Professional Position** = Form contains fields relevant to A/P Positions
- **Create new Office Support/Technical position** = Form contains fields relevant to OST Positions
- **Create New Other Position** = this is a shorter form with fields relevant to positions in areas such as Public Safety or Research Scientists.

6. The first 4 fields you will see are:

- 1) Position Title
- 2) Executive Level (defaults based on the user's system security)
- 3) Division: (defaults based on the user's system security)
- 4) Department: Select the Department in which this Position will reside. This field only relate to the system security of the end users who will participate in the Position Creation process. (Later, you will designate the Funding and Posting information for this Position.)

Press Start Action to continue. Start Action



The screenshot shows a web-based application interface for creating a new administrative/professional position. At the top, there is a navigation bar with links for Home, Positions, Position Classes, My Profile, Help, and a user profile for Jill Smith. Below the navigation bar, the URL is shown as Positions / Staff / Create New Administrative/Professional (AP) Position. The main content area is titled "Create New Administrative/Professional (AP) Position". It contains four input fields, each with a yellow numbered callout indicating its sequence: 1) Position Title (input field contains "Collections Manager"), 2) Executive Level (input field contains "Provost (EXEC02)", with a dropdown arrow), 3) Division (input field contains "College of Business Administration (DIV21)", with a dropdown arrow), and 4) Department (input field contains "Accounting Group (119200)", with a dropdown arrow). At the bottom right of the form, there are two buttons: "Start Action" (highlighted with a yellow arrow) and "Cancel".

Note: You may choose to instead 'clone' an existing position. (All of the attributes associated with this selected Position will carry over to this new Position.) Leave Org fields blank and:

- 1) Select a Position from the Library shown on the page
- 2) Press Start Action.

The screenshot shows a software interface for managing positions. At the top, there is a form with fields: 'Position Title' (empty), 'Executive Level *' (set to 'Provost (EXEC02)'), 'Division *' (empty dropdown), and 'Department *' (dropdown set to 'Please Select...'). In the top right corner, there are buttons labeled 'Start Action' (highlighted with a yellow box) and 'Cancel'. Below the form, a section titled 'Clone an existing Position?' is visible, with a link 'Filter these results'. A modal window titled 'Positions' is open, showing a list of items under a heading 'Saved Search: "Positions" (18 Items Found)'. The list includes columns: Position Number, Position Title, Department, Employee Last Name, Employee First Name, and Actions. One item is highlighted with a yellow box: '1 22PD Budget Manager Accounting Group (119200) Rodriguez Betty Actions▼'. The entire interface has a clean, modern design with a light gray background and blue/gray UI elements.

7. The next page will ask you to select a Class Title. (If you choose to clone a Position, go to step 7a on the next page). If you are unsure of the Class, you may skip this step and HR Comp will fill it in for you.
- If you know which Class to select, select the Class and Press Next. To skip this step, just Press Next.

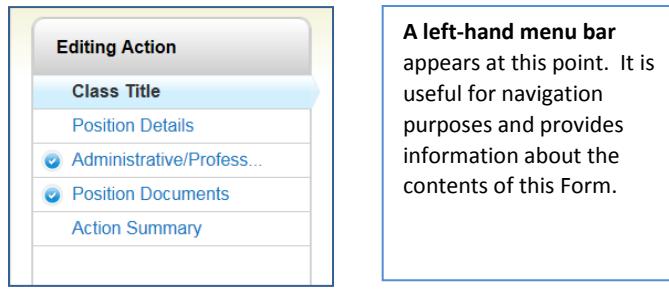
The screenshot shows a software interface for selecting a class title. At the top, there is a navigation bar with tabs: Home, Positions, Position Classes (highlighted with a blue background), My Profile, and Help. The user is logged in as 'Jill Smith'. Below the navigation, a breadcrumb trail shows the current location: Actions / ... / Create New Administrative/Professional (AP) Position / Manager of Collections / Edit. On the left, a sidebar menu titled 'Editing Action' is open, showing options: Class Title (selected and highlighted with a blue background), Position Details, Administrative/Profess..., Position Documents, and Action Summary. On the right, there is a 'Class Title' input field and a 'Position Classes - Filter these results' section. A modal window titled 'Position Classes' is open, showing a list of items under a heading 'Saved Search: "Position Classes" (120 Items Found)'. The list includes columns: Position Class Code, Position Class Title, FT/PT Indicator, Exempt Indicator, Benefits Eligible, and Actions. Three items are listed: AP01 (Academic Administration 7, Full Time, Exempt, Yes, Actions▼), AP02 (Academic Advisement 7, Full Time, Exempt, Yes, Actions▼), and AP03 (Accounting Admin 7, Full Time, Exempt, Yes, Actions▼). A yellow circle highlights the 'AP01' row. A yellow arrow points from the 'Next >>' button at the bottom right of the main screen towards the 'Save' button in the 'Position Classes' modal. The overall layout is professional and user-friendly.

To view the attributes of a Class, go to the Actions column and select View Position Class. You may also click on the Position Class Code / Title.

Position Class Code	Position Class Title	FT/PT Indicator	Exempt Indicator	Benefits Eligible	(Actions)
AP01	Academic Administration 7	Full Time	Exempt	Yes	Actions▼
AP02	Academic Advisement 7	Full Time	Exempt	Yes	Actions▼
AP03	Accounting Admin 7	Full Time	Exempt	Yes	GENERAL
AP04	Accounts Payable Admin 7	Full Time	Exempt	Yes	View Position Class

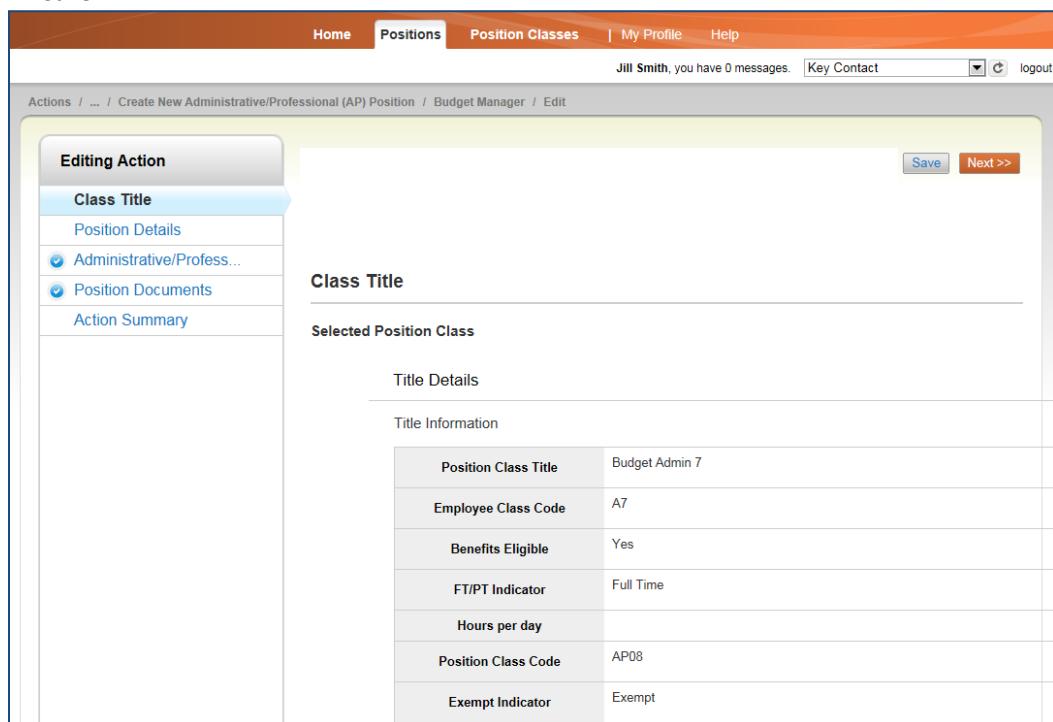
Note: Pressing 'View Position Class' may result in a window that warns you that you will lose unsaved data. Press cancel, Save the Position  and go to Actions > View Position Class again.

Note about the Staff Positions section:



The screenshot shows a sidebar titled "Editing Action" with the following items listed vertically: Class Title, Position Details, **Administrative/Profess...**, Position Documents, and Action Summary. To the right of the sidebar, a blue-bordered box contains the text: "A left-hand menu bar appears at this point. It is useful for navigation purposes and provides information about the contents of this Form."

7a. If you choose to clone a position, the Class Title Page will be filled in to show the attributes of the Cloned position. To change the Class code, select the Class code from the list that shows on the page, and press .



The screenshot shows the "Editing Action" menu on the left with the "Class Title" item selected. The main area displays the "Selected Position Class" details under "Title Details". The "Title Information" table includes the following rows:

Position Class Title	Budget Admin 7
Employee Class Code	A7
Benefits Eligible	Yes
FT/PT Indicator	Full Time
Hours per day	
Position Class Code	AP08
Exempt Indicator	Exempt

The remaining steps in Cloning a Position are the same as the steps described in this section. However you will notice that many of the fields have already been filled in. You may edit, add or delete the field values directly on the form.

8. The Position Details page is the start of the Positions Form. Note: you will have an **Action Number** assigned to this Position. You will need this Action Number when you create a Requisition, to validate that you have an approved Position action.

➤ Fields with an * are required.

The screenshot shows a web-based application interface for creating a new administrative/professional position. The top navigation bar includes links for Home, Positions, Position Classes, My Profile, and Help. The user is identified as Jill Smith. The main content area is titled "Position Details". On the left, a sidebar titled "Editing Action" lists several sections: Class Title, **Position Details**, Administrative/Profess..., Position Documents, and Action Summary. The "Position Details" section is currently selected and highlighted with a blue background. In the main panel, there is a "Job Evaluation" section containing an "Action Number" field with the value "201265PA", which is circled in yellow. Below this, there is a "Reason for request (e.g. department restructuring/reorganizing, new programs/services being offered)" field, which also has a yellow circle around its label. At the bottom right of the main panel, there are "Save", "<< Prev", and "Next >>" buttons.

Position Details Form	
Field	Notation about the Field
Action Only (not in library) section (The fields in this section are tied to this action only, not written to the Position Library and not viewable to the applicant or to the employee.)	
Action Number	System auto-assigned. The Action number will be needed later for subsequent Requisition.
Type of Request	Help HR Comp determine the approval group required.
Reason for Request	Required. Information for HR/Comp
New Responsibilities added or removed New/different skill or competency requirements Other changes / add'l information Other positions that have similar responsibilities Expected outcomes	Information you enter here will be used by HR/Comp in the Job Evaluation process.
HR Comp Representative	Select the primary staff member in HR/Comp who will work on this Position
HR Compensation Comments	Do not fill in – for HR/Comp use.
Funding Type	Select one of the valid values: New Funding or Reallocated
Reallocated from a discontinued position?	<p>Answer this question if the answer to the Funding type (above) is 'Reallocated'. Possible values are Yes or No.</p> <ul style="list-style-type: none"> • If you select No, it means that the position is NOT reallocated from a discontinued position, then the position is reallocated from a non-salary source. Please provide the Non-Salary Source in the field below. • If you select Yes, please provide the Discontinued Position # and Position Title below.

Discontinued Position Number	Fill these in this question if the answer to the Reallocated from a discontinued position question (above) is Yes.
Discontinued Position Title	
Non-Salary Source	Fill these in this question if the answer to the Reallocated from a discontinued position question (above) is No.
Minimum Expected Salary	This information will be compared to the salary field in the subsequent Hiring Proposal
Maximum Expected Salary	
Position Information Section (These fields are required for Banner)	
Position Title	Can be edited
Position Number	System will auto-assign when the Position is approved.
Grade	Proposed Grade. Select one, HR/Comp will verify.
Reports To	Enter the name of the individual or the Position # to which this position will report.
Job Code	If you know this, enter the values and HR/Comp will verify. You may skip these fields.
Census Code	
Fiscal Year	Select the fiscal year in which you will start using this position.
Position Status	Select Active
Position Type	Select Single or Pooled. Pooled would be selected if the position is meant to have more than one employee hired into it.
Position Funding Information Section	
Index lookup link	Links to the Banner Finance Help page, if you need to look this up.
Add Position Funding Information Entry	Opens a view to 3 fields for Index, Account and percent. If percent is less than 100% please press the Entry button again to submit additional entries until all entries sum up to 100%. This will not be validated by the system please take care to ensure the total is 100%.
Additional Posting Information Section (these fields will carry over to the Requisition)	
Position Summary	Enter summary information here, or copy and paste from existing Job Description.
Qualifications	Enter qualification information here, or copy and paste from existing Job Description.

9. Press next to continue [Next >>](#)

10. The Administrative/Professional section of the form appears next.

The screenshot shows a software application window titled "Administrative/Professional". At the top, there's a navigation bar with links for Home, Positions (which is selected), Position Classes, My Profile, and Help. Below the navigation bar, a user profile for "Jill Smith" is shown, indicating 0 messages, with options to Key Contact and logout. The main content area has a title "Editing Action" and a sidebar with checkboxes for Class Title, Position Details, and Adminstrative/Profess... (with "Administrative/Profess..." being the selected item). Other items in the sidebar include Position Documents and Action Summary. The main panel is titled "Administrative/Professional" and contains sections for "Key Responsibilities & Accountabilities" (with a "Check spelling" dropdown) and "Financial Measures/Customer Service Aspects". A note below these sections states: "This section helps to provide perspective on the financial and customer service responsibilities that apply to this job. Please provide relevant data to the extent that it is available." A large text input field labeled "Annual Operating Budget that the job..." is present. At the bottom right of the main panel are buttons for Save, << Prev, and Next >>.

Administrative/Professional Form	
Field	Notation about the Field
Key Responsibilities and Accountabilities section	
Add Key Responsibilities & Accountabilities Entry	Opens a view to 2 fields for Responsibility and percent. If percent is less than 100% please press the Entry button again to submit additional entries until all entries sum up to 100%. This will not be validated by the system please take care to ensure the total is 100%.
Financial Measures / Customer Service Aspects	
Annual Operating Budget the Job Manages	Enter a dollar amount here, and any supporting details and information
Other Relevant Quantitative Information	Describe other monetary factors such as fundraising, financial aid, tuition revenues, etc)
Customer Service	Describe service level factors such as student contact, internal and/or external contact.
Supervision	
Number of Professional and Administrative (exempt) employees reporting directly to this job	Enter a headcount number in these fields, and any supporting details and information
Number of Office/Support and technical Staff (nonexempt) employees reporting directly to this job	
Number of Co-op student employees reporting directly to this job	
Number of Other student employees reporting directly to this job	
Number of employees reporting indirectly to this job	

11. Press next to continue [Next >>](#)

12. Position Documents: Here, you may upload one supporting document, such as an Org Chart. Press the Actions link and select one of the 3 choices:

- ✓ Upload new: Browse for the document to upload.
- ✓ Create New: Open a content window and you can enter, or copy/paste material as a new document.
- ✓ Choose existing: This is an option if you have previously uploaded documents to PeopleAdmin.

The screenshot shows a web-based application interface for managing position documents. At the top, there's a navigation bar with tabs: Home, Positions, Position Classes (which is the active tab), My Profile, and Help. Below the navigation is a user status bar showing "Jill Smith, you have 0 messages." and links for Key Contact, logout, and a search icon. The main content area has a breadcrumb trail: Actions / ... / Modify Administrative/Professional (AP) Position / Admissions Assistant II / Edit. The left sidebar, titled "Editing Action", contains several options with radio buttons: Class Title, Employee, Position Details, Administrative/Profess..., Position Documents (which is selected and highlighted in blue), and Action Summary. The main right-hand panel is titled "Position Documents". It includes a note: "PDF conversion must be completed for the document to be valid when applicable." Below this is a table with columns: Document Type, Name, Status, and (Actions). The table shows two entries: "Miscellaneous" (Approved Comp Memo, Approved PMA). An "Actions" dropdown menu is open over the second row, listing three options: Upload New, Create New, and Choose Existing. At the bottom of the panel are "Save", "<< Prev", and "Next >>" buttons.

13. Press next to continue [Next >>](#)

14. The Summary page appears next. Here, you can review all the entries you have made, and edit the information before submission. Press the Edit link in any section to make changes.

➤ Note the following 5 features of this page:

- 1) Current Status: This reflects the stage in the Workflow. This value changes along the steps in the workflow.
- 2) Owner: This also reflects the stage in the Workflow. This value changes along the steps in the workflow.
- 3) History tab: View the changes and workflow steps that have transpired during the life of the Position.
- 4) Settings tab: View the Position's Org Security fields, and make any edits on this page.
- 5) Position Class Code: Based on the code you selected earlier, the Class attributes are now displayed.

The screenshot shows the 'Create New Administrative/Professional (AP) Position' page. At the top, there are tabs for Home, Positions, Position Classes, My Profile, and Help. Below that, a navigation bar shows 'Jill Smith, you have 0 messages.' and a 'Logout' link. The main content area has a title 'Create New Administrative/Professional (AP) Position' and a sub-title 'Position: Manager of Collections (Staff) [Edit](#)'. On the left, there's a sidebar with 'Current Status: Draft' (labeled 1), 'Position Type: Staff', 'Department: Accounting Group', 'Created by: Jill Smith', and 'Owner: Jill Smith' (labeled 2). Below the sidebar are three tabs: 'Summary' (labeled 3), 'History' (labeled 4), and 'Settings'. Under 'Summary', there's a section for 'Class Title' with a checked checkbox and an 'Edit' link. A table follows, with columns for 'Position Class Title' (Academic Advisement 7), 'Employee Class Code' (A7), 'Benefits Eligible' (Yes), 'FT/PT Indicator' (Full Time), 'Hours per day' (empty), 'Position Class Code' (AP02) (labeled 5), and 'Exempt Indicator' (Exempt). At the bottom, there are 'Details' and 'Edit' links.

15. Press the Take Action on Action button

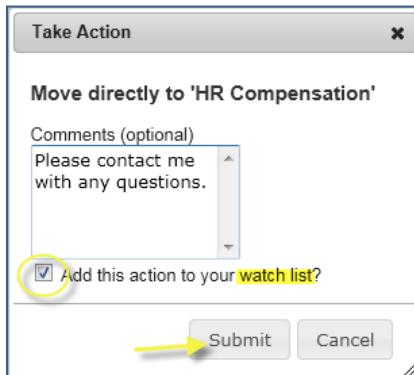


The **Take Action** selection will move this Position action to the next step in the Workflow (see the Flow Charts). Four choices are:

- **Keep working on this Action:** This saves the form and allows you to go back in later and continue working on it before taking action.
- **Cancel Action:** This equals 'Disapproval' and the Position will not be able to be re-activated later.
- **HR Comp:** This moves the action 'forward' in the workflow.
- **Originator:** This moves the action 'backward' in the workflow.

16. Select HR Compensation

17. The Take Action window appears next.



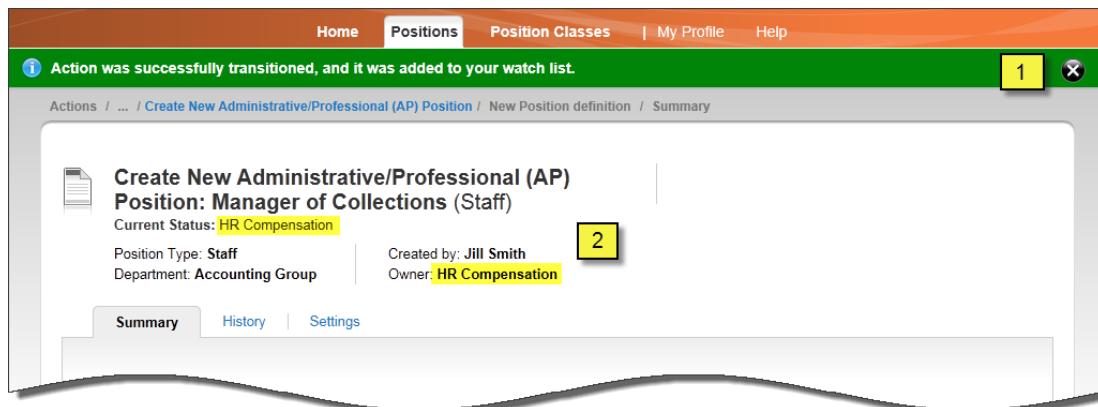
The Take Action window:

- You can enter a **comment** which would appear in the transition email to HR/Comp. (Comments do not get stored in the Position library).
- The checkbox for "**Add this action to your watch list?**" is defaulted as checked. You can monitor the subsequent activity of this action using your Watch List.

18. Press Submit

19. The next page shows the results of your submission:

- 1) Green bar with the 'success' message appears next (press the x icon to close the green bar). If this bar is red you will see an error message, typically indicative of a missed required field. You can go back in and edit the form and re-submit.
- 2) Status and Owner indicators now show **HR Compensation**. You now cannot edit the Position Action.



20. Check your Watch List: Press the Watch List button

Requisitions
There are not any requisitions in your watch list.

Hiring Proposals
There are not any hiring proposals in your watch list.

Actions

Job Title	Type	Current State	State Owner	Creator	Actions
Manager of Collections	Staff	HR Compensation	HR Compensation	Jill Smith	Actions

Note: On the Watch list, you can now monitor the current state owner. You will now know whom to call with any questions on the Position Action's status.

In the event this Position action is sent BACK to you, an email will come to your NEU email, and the Action will appear in your PeopleAdmin Inbox window. To make the requested edits Navigate to the Position.

- 1) Select the Product Module of Position Management
- 2) Select the Role of Originator or Key Contact
- 3) Within the Inbox window, press the Actions tab.
- 4) Click on the Position title.

Welcome to your Online Recruitment System

Inbox (5 items need your attention)
Displaying items for group "Key Contact".

Title	Type	Current State	State Owner
/hr/actions/15	Tenure Track Hiring Proposal	Key Contact	Key Contact
Sr Academic Coordinator	Create New Administrative/Professional (AP) Position	Key Contact	Key Contact
Manager of Collections	Create New Administrative/Professional (AP) Position	Key Contact	Key Contact

Shortcuts
Create New Staff Requisition
Create New Full-Time Faculty Requisition
Create New Part-Time Faculty Requisition

My Links
Training Videos
(Go here for helpful videos for staff training)

Useful Links

Then, Press the Edit link on the Position Action and make your edits; resubmit to HR/Comp.

Modify a Staff Position

In the event anything needs to be changed in a Position **which is in the Library**, whether or not there are any employees seated in the position, you will follow the steps below to make the change. You must have the role of Originator, Key Contact or HR/Compensation to edit a Position. **See examples below:**

Ex: Position information that needs to be changed	Position is Vacant or Filled	Employee Impact?	Banner Impact?	Workflow
A. Part of the Job Description, such as Responsibilities.	Vacant or Filled	No	No	Originator > Key Contact > HR Compensation. HR Compensation is final Approval.
B. Fields in the Banner portion such as Grade or Title, intend to post this position.	Vacant	No	Yes	Full workflow (see process flow chart)
C. Fields in the Banner portion such as Grade or Title, intend to make a change to an employee.	Filled	Yes	Yes	Full workflow (see process flow chart). Then, to make the change to the employee's job record, submit an HR Action Form.

Steps to Modify a Staff Position

1. Select the Product Module of Position Management
2. Select the Role of Originator or Key Contact
3. Select the Positions tab, and choose Staff



4. Select the Position

➤ In this example, we will modify the Title and Grade of the Academic Coordinator Position.

The screenshot shows the 'Staff Positions' list page. At the top, there are search fields for 'Open Saved Search', 'Search' (with a placeholder 'Search:'), and 'More search options'. Below these are tabs for 'Ad hoc Search' and 'Positions'. A saved search titled 'Saved Search: "Positions" (18 Items Found)' is listed. The main table lists 18 positions, each with columns for Position Number, Position Title, Department, Employee Last Name, Employee First Name, and Actions. The last row, which contains the 'Academic Coordinator' position, is highlighted with a yellow box labeled '4' and has a yellow circle around its 'Actions' column.

Position Number	Position Title	Department	Employee Last Name	Employee First Name	Actions
504520	Dean of Bouve College	Accounting Group (119200)			Actions ▾
504521	Post Doctoral Research Ass	Accounting Group (119200)			Actions ▾
2011001PD	New OST position	Accounting Group (119200)			Actions ▾
2011004PD	Administrative Assistant - CBA	Accounting Group (119200)			Actions ▾
2011005PD	Academic Coordinator	Accounting Group (119200)			Actions ▾

5. Select an Action from the list on the following page. (Note: if you do NOT see these list items, it means that the Position is currently being modified, and you may not modify it until that action is completed). (We will select **Modify Administrative/ Professional (A/P) position.**)

The screenshot shows the 'Position: Academic Coordinator (Staff)' page. At the top, there are tabs for Home, Positions (which is selected), Position Classes, My Profile, and Help. Below the tabs, it says 'Jill Smith, you have 0 messages.' and includes links for Key Contact, logout, and a search bar. The main content area displays the position details: Position Type: Staff, Current Status: Active, Department: Accounting Group. To the right, a list of actions is shown, with the fifth item, 'Modify Administrative/Professional (A/P) Position', highlighted by a yellow box and connected by a yellow curved arrow to a callout box containing the same text.

Action List Item	Impact of this Choice
<i>Administrative/Professional (A/P):</i>	
★ Modify Administrative/Professional (A/P) Position	This form is unique to the 'Administrative/ Professional (A/P)' Positions. Changes made on this form will follow the Workflow steps previously described in this section.
★ Approval to Post Existing Administrative/Professional (A/P) Position without Changes	No changes will be made to this A/P position; it should be posted as-is. There is only one approval step in the Workflow.
<i>Office Support / Technical (OST):</i>	
★ Modify Office Support / Technical (OST) Position	This form is unique to the 'Office Support / Technical (OST)' Positions. Changes made on this form will follow the Workflow steps previously described in this section.
★ Approval to Post Existing Modify Office Support / Technical (OST) Position without Changes	No changes will be made to this OST position; it should be posted as-is. There is only one approval step in the Workflow.
<i>Other (use this to create to Research Scientist Grades 10-13 Positions)</i>	
★ Modify Other Position	This form is unique to the 'Other' Positions. Changes made on this form will follow the Workflow steps previously described in this section.
★ Approval to Post Existing Other Position without Changes	No changes will be made to this 'Other' position; it should be posted as-is. There is only one approval step in the Workflow.

Select **Modify Administrative/ Professional (A/P) position.**

6. On the next page Press Start. Once this action has started, it will be locked from other updates until the action has been completed

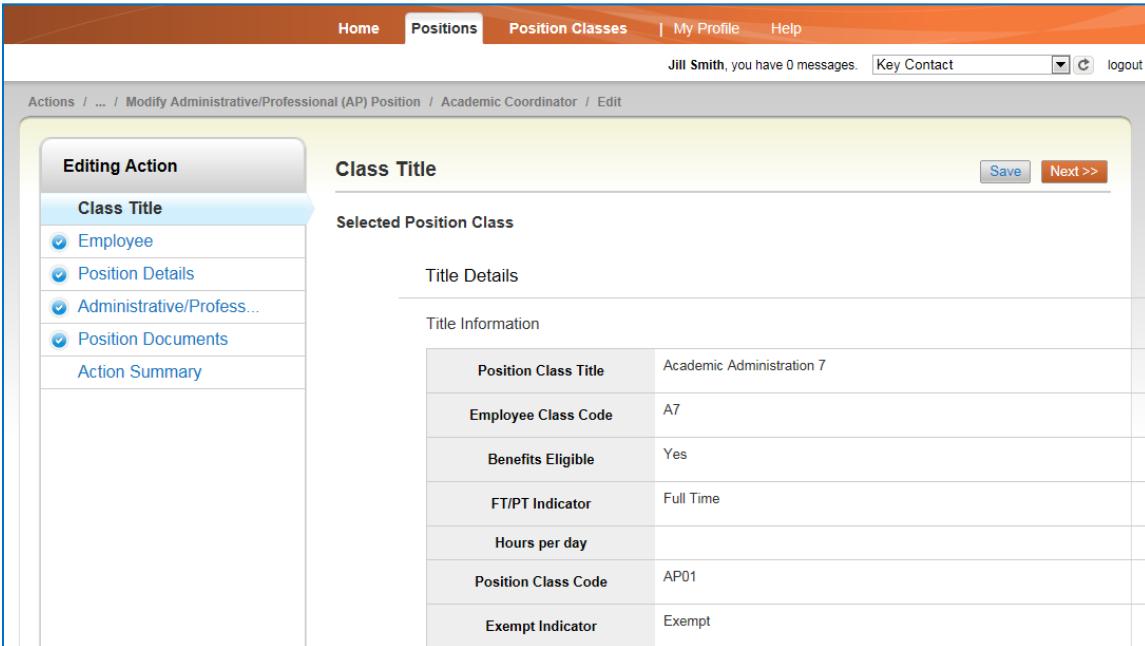


Start Modify Administrative/Professional (AP) Position Action on Academic Coordinator?

Once it has been started, this action will lock the position from other updates until the action has completed.

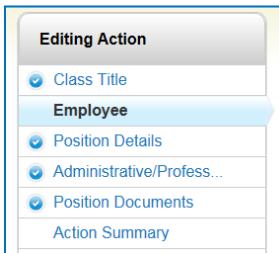
Start **6**

The next page opens up the Position form.



Class Title	
Selected Position Class	Save Next >>
Title Details	
Title Information	
Position Class Title	Academic Administration 7
Employee Class Code	A7
Benefits Eligible	Yes
FT/PT Indicator	Full Time
Hours per day	
Position Class Code	AP01
Exempt Indicator	Exempt

Note about the Editing Action Menu Tabs:



The Employee tab shows you the employee that is associated with this position as a result of actions within PeopleAdmin.
This may not reflect current information in Banner.
 Therefore, Banner should be considered the system of record for any employee data.

7. To change the Title and Grade, go to the **Position Details** tab and scroll to the Position Information section. Change the title, and use the drop-down to select the new grade.

Editing Action	
<input checked="" type="checkbox"/>	Class Title
<input checked="" type="checkbox"/>	Employee
<input checked="" type="checkbox"/>	Position Details 7
<input checked="" type="checkbox"/>	Administrative/Profess...
<input checked="" type="checkbox"/>	Position Documents
Action Summary	

Before	After
<div style="background-color: #d9e1f2; padding: 5px;"> Position Information (Required for Banner) </div> <div style="margin-top: 10px;"> <p>Position Title → Academic Coordinator</p> <p>Non-salary source</p> <p>Position Number 2011005PD</p> <p>Grade → 9</p> <p>Reports To Lauren Haas, Director</p> <p>Job Code 676767 Must be 6 digits</p> <p>Census Code 203 Must be 3 digits</p> <p>Fiscal Year 2012</p> <p>Position Status Active</p> <p>Position Type Single</p> </div>	<div style="background-color: #d9e1f2; padding: 5px;"> Position Information (Required for Banner) </div> <div style="margin-top: 10px;"> <p>Position Title Senior Academic Coordinator</p> <p>Non-salary source</p> <p>Position Number 2011005PD</p> <p>Grade → 10</p> <p>Reports To Lauren Haas, Director</p> <p>Job Code 676767 Must be 6 digits</p> <p>Census Code 203 Must be 3 digits</p> <p>Fiscal Year 2012</p> <p>Position Status Active</p> <p>Position Type Single</p> </div>

8. Scroll to the top of the page and press Save
 9. Select the Action Summary tab.

Editing Action

<input checked="" type="checkbox"/> Class Title	
<input checked="" type="checkbox"/> Employee	
<input checked="" type="checkbox"/> Position Details 8	Save << Prev Next >>
<input checked="" type="checkbox"/> Administrative/Profess...	
<input checked="" type="checkbox"/> Position Documents	
Action Summary 9	

Position Details

ABC [Check spelling](#) ▾

* Required Information

Job Evaluation

Action Number

2012105PA

Reason for request /

Reorganization

On the Action Summary page, scroll to the Position Information section, and note that the current value and changes values are shown.

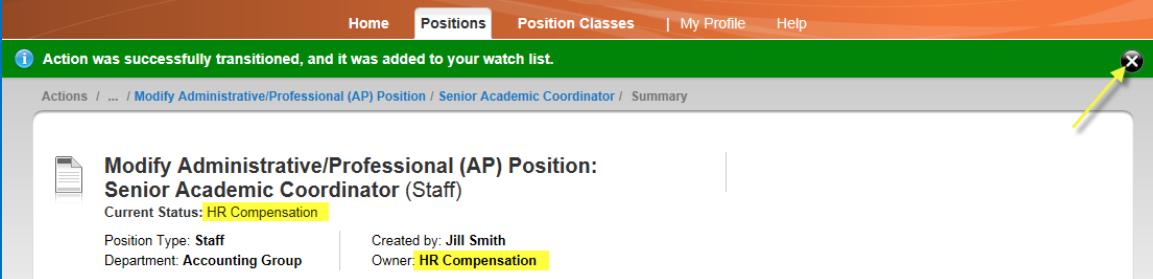
Position Information (Required for Banner)	
Position Title	Senior Academic Coordinator Currently: Academic Coordinator
Non-salary source	
Position Number	2011005PD
Grade	10 Currently: 9
Reports To	Lauren Haas, Director
Job Code	676767
Census Code	203
Fiscal Year	2012
Position Status	Active
Position Type	Single

10. Scroll back to the top of the page and press **Take Action On Action ▾**
- Select HR Compensation.
 - Add a note (if applicable) in the Take Action window and press Submit.

The next page shows the results of your submission:

A green bar with the 'success' message appears next (press the x icon  to close the green bar). If this bar is red you will see an error message, typically indicative of a missed required field. You can go back in and edit the form and re-submit.

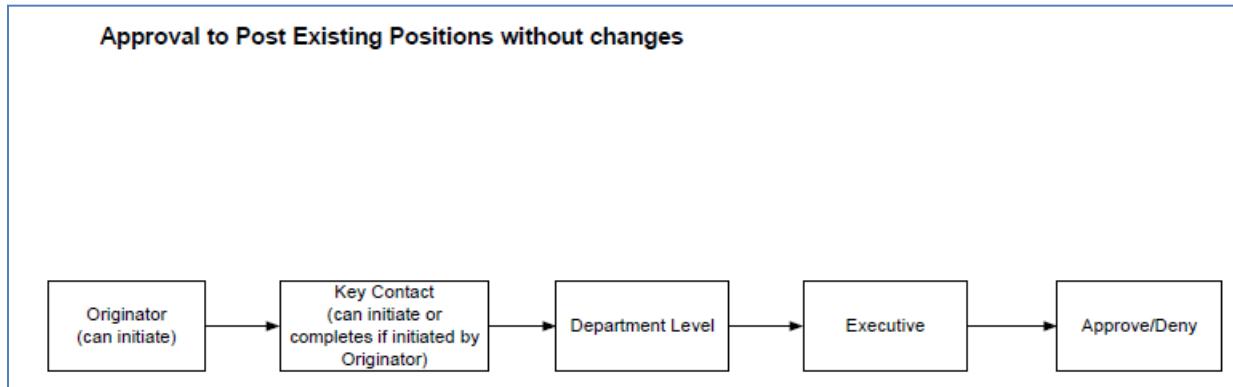
Status and Owner indicators now show **HR Compensation**. You cannot edit the Position Action.



The screenshot shows a web-based application interface for managing positions. At the top, there is a navigation bar with links for Home, Positions (which is the active tab), Position Classes, My Profile, and Help. Below the navigation bar, a green success message box displays the text: "Action was successfully transitioned, and it was added to your watch list." An arrow points from the text "press the x icon" in the previous instruction to the close button in the top right corner of this message box. The main content area is titled "Modify Administrative/Professional (AP) Position: Senior Academic Coordinator (Staff)". It shows the current status as "HR Compensation". On the left, there are fields for Position Type (Staff) and Department (Accounting Group). On the right, it shows the creator as Jill Smith and the owner as HR Compensation. The URL in the browser's address bar indicates the user is on the "Summary" page of a "Senior Academic Coordinator (Staff)" position.

Post an Existing Staff Position With no Changes

You may choose to post a position as-is, with no changes. The approval path for this type of action is much more simplified. Typically, this is a result of a recent vacancy.



Steps to Post a Position with no Changes

1. Select the Product Module of Position Management
2. Select the Role of Originator or Key Contact
3. Select the Positions tab, and choose Staff



4. Select the Position by clicking on the Position Number or the Position Title.
- In this example, we will post a Research Scientist Position.

5. Select 'Approval to Post Existing Administrative/ Professional (AP) position without changes'.

6. On the next page Press 



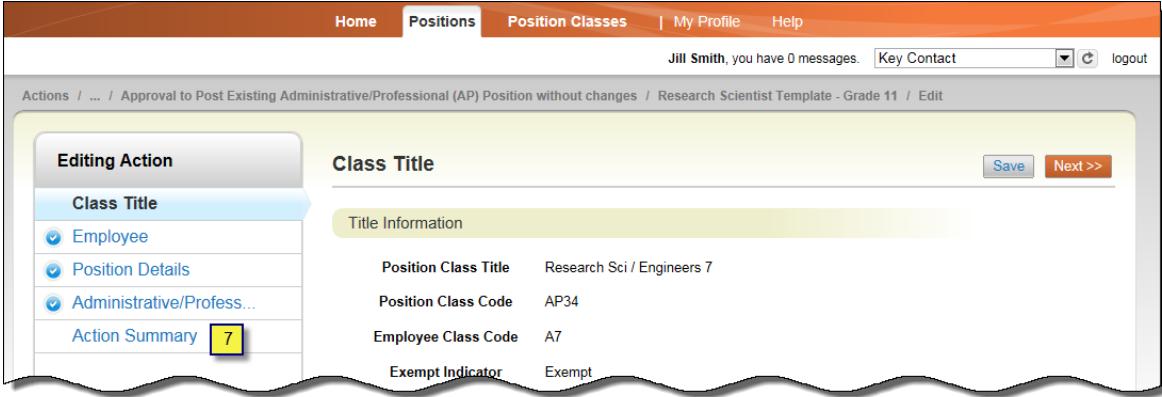
Start Approval to Post Existing Administrative/Professional (AP) Position without changes Action on Research Scientist Template - Grade 11?

Once it has been started, this action will lock the position from other updates until the action has completed.

On the next page you can view the attributes of the Position by clicking on the left hand tabs.

7. Press Action Summary.



Editing Action

Class Title

Employee

Position Details

Administrative/Profess...

Action Summary 

Class Title

Title Information

Position Class Title: Research Sci / Engineers 7

Position Class Code: AP34

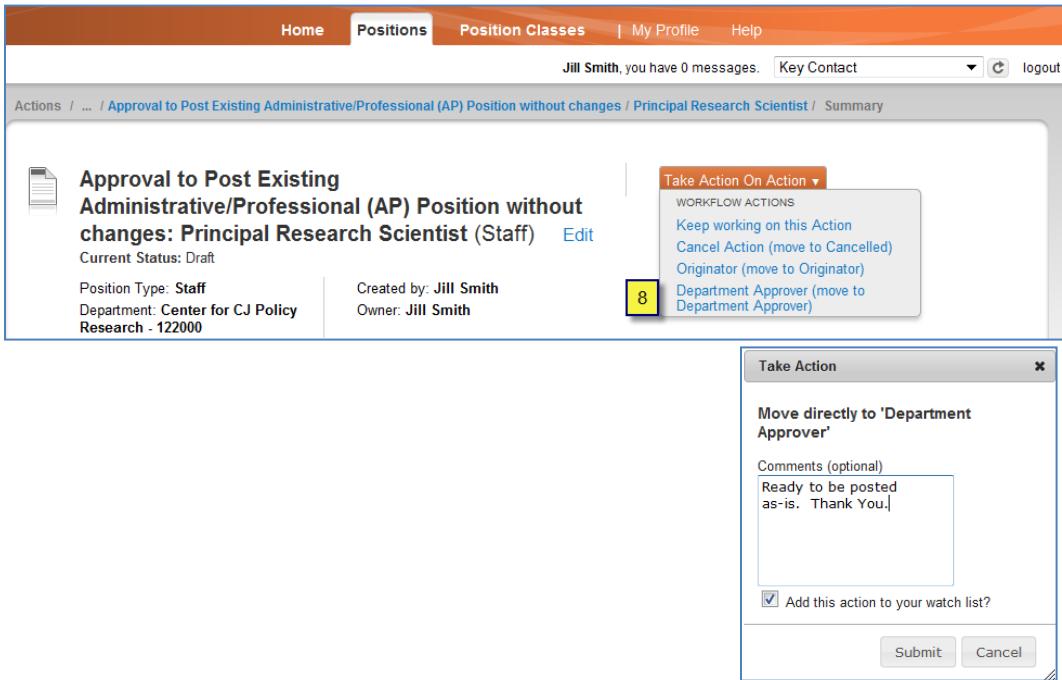
Employee Class Code: A7

Exempt Indicator: Exempt

8. Press 

- Select Department Approver
- Add a note in the Take Action window and press Submit.



Approval to Post Existing Administrative/Professional (AP) Position without changes: Principal Research Scientist (Staff) 

Current Status: Draft

Position Type: Staff
Department: Center for CJ Policy Research - 122000

Created by: Jill Smith
Owner: Jill Smith

Take Action On Action ▾

WORKFLOW ACTIONS

Keep working on this Action
Cancel Action (move to Cancelled)
Originator (move to Originator)
Department Approver (move to Department Approver)

Take Action

Move directly to 'Department Approver'

Comments (optional)
Ready to be posted as-is. Thank You.

Add this action to your watch list?

Submit Cancel

The next page shows the results of your submission:

A green bar with the 'success' message appears next (press the x icon to close the green bar). If this bar is red you will see an error message, typically indicative of a missed required field. You can go back in and edit the form and re-submit.

Status and Owner indicators now show Department Approver. You now cannot edit the Position Action.

Action was successfully transitioned, and it was added to your watch list.

Watch List POSITION MANAGEMENT

Home Positions Position Classes | My Profile Help

Jill Smith, you have 0 messages. Key Contact logout

Actions / ... / Approval to Post Existing Administrative/Professional (AP) Position without changes / Principal Research Scientist / Summary

**Approval to Post Existing
Administrative/Professional (AP) Position without
changes: Principal Research Scientist (Staff)**

Current Status: **Department Approver**

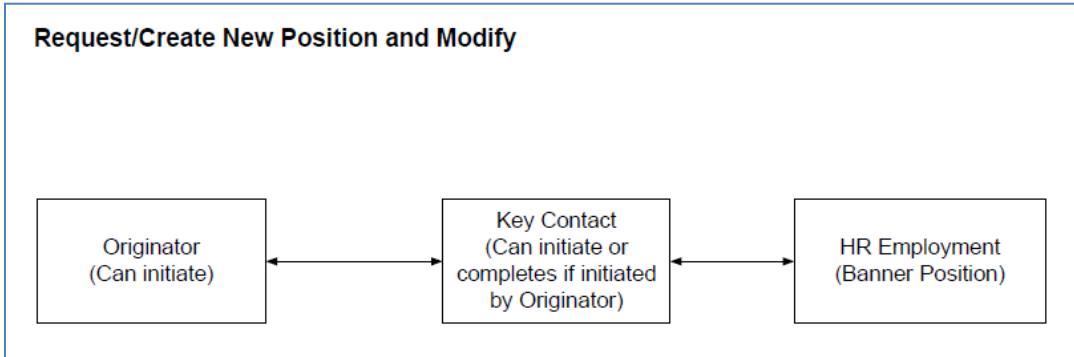
Position Type: Staff Created by: Jill Smith
Department: Center for CJ Policy
Research - 122000 Owner: **Department Approver**

Faculty

The Position Management Activity Form (PMA) has been replaced with an online form found in PeopleAdmin.

Create New Full-Time or Part-Time Faculty Position

- A position is not required to be in existence prior to creating and posting a faculty requisition. However, since a Faculty position will be required in order to hire a Faculty candidate, positions should be requested and approved as early in the process as possible.
- A new Position can be initiated by an Originator or a Key Contact. If you create a Position in the role of an Originator, the Position will go to the Key Contact next, and then the Key Contact will send it to HR Employment. HR Employment will send it back to the Key Contact if adjustments are needed or create the Position in Banner.
- Each user in the workflow steps will receive an email when the action has been forwarded to them. The initiator will receive an email at the end of the process when the action has been Approved.



Steps to Create a new Full Time or Part Time Faculty Position

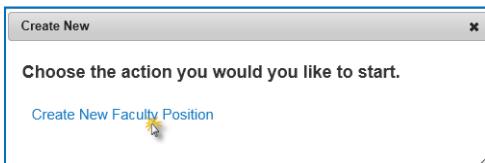
1. Go to Positions Module
2. Change role to an Originator or a Key Contact.
3. From the Positions tab, select Full-Time faculty
 - a. Full-Time Faculty = View the Positions Library, and Create Positions.
 - i. You must go to the Library to initiate a transaction or look at existing Positions.
 - b. Full-Time Faculty Actions = Listing of transactions that you have created.
 - i. You must go to Actions to determine the status of an existing transaction



4. The Positions Library appears next. Press the Create New Position button

The screenshot shows the 'Full-Time Faculty Positions' library. At the top, there's a navigation bar with tabs: 'Home', 'Positions' (selected), 'Position Classes', and links for 'My Profile' and 'Help'. Below the navigation bar, it says 'Jill Smith, you have 0 messages.' and 'Key Contact'. The main content area has a header 'Full-Time Faculty Positions'. Below the header are search and filter options: 'Open Saved Search', 'Search' input field, 'Search' button, and 'More search options'. There's also an 'Ad hoc Search' section with a 'Faculty Default Position Se...' button. A yellow box labeled 'Create New Position' points to the orange 'Create New Position' button in the top right. Another yellow box labeled 'Below are the Positions in the Library' points to the list of positions below. A yellow box labeled 'Saved Search: "Faculty Default Position Search" (1 Item Found)' points to the saved search results. The list of positions includes columns for 'Position Title', 'Position Number', 'Department', and '(Actions)'. One item in the list is 'Professor - American History' with 'CAS Graduate (128200)' in the Department column and an '(Actions)' button.

5. In the next window, click on Create New Faculty Position.



6. On the next page, The first 4 fields you will see are:

- 1) Position Title
- 2) Executive Level (defaults based on the user's system security)
- 3) Division: (defaults based on the user's system security)
- 4) Department: Select the Department in which this Position will reside. This field only relate to the system security of the end users who will participate in the Position Creation process. (Later, you will designate the Funding and Posting Org information for this Position.)

Press Start Action to continue. Start Action

The screenshot shows a web-based application interface for creating a new faculty position. At the top, there is a navigation bar with tabs: Home, Positions (which is the active tab), Position Classes, My Profile, and Help. The status bar indicates "Jill Smith, you have 0 messages." and includes links for Key Contact, logout, and other user options. Below the navigation, the URL "Positions / Full-Time Faculty / Create New Faculty Position" is visible. The main content area is titled "Create New Faculty Position" and contains four input fields, each with a yellow numbered callout indicating its corresponding step from the instructions above:

- Position Title:** Callout 1, value: Professor - European History.
- Executive Level:** Callout 2, value: Provost (EXEC02).
- Division:** Callout 3, value: College of Arts and Sciences (DIV24).
- Department:** Callout 4, value: CAS Graduate (128200).

At the bottom right of the form are two buttons: "Start Action" (highlighted with a yellow arrow) and "Cancel".

Note: You may choose to instead 'clone' an existing position. (All of the attributes associated with this selected Position will carry over to this new Position.) Leave Org fields blank and:

- 1) Select a Position from the Library shown on the page
- 2) Press Start Action.

 Create New Faculty Position

Position Title

Executive Level * Provost (EXEC02)

Division *

Department *

Clone an existing Position?

Filter these results

Faculty Default Position Se... 

Saved Search: "Faculty Default Position Search" (1 Item Found)

Position Title	Position Number	Department	(Actions)
Professor - American History	1	CAS Graduate (128200)	Actions▼

7. The next page will ask you to select a Class Title. (If you chose to clone a Position, go to step 7a on the next page). The attributes of the Class are Benefit Eligible, FT/PT, Hours and Exempt Indicator and these values will carry over to the new Position. If you are unsure of the Class, you may skip this step and HR Comp will fill it in for you.

➤ If you know which Class to select, select the Class and Press Next. To skip this step, just Press Next.

Editing Action

Position Class

Position

Action Summary

Position Class

Position Classes - Filter these results

Position Class Code	Position Class Title	FT/PT Indicator	Exempt Indicator	Benefits Eligible	(Actions)
FAC01	Department Chairs	Full Time	Exempt	Yes	Actions▼
FAC02	Faculty Tenured/Tenure Track	Full Time	Exempt	Yes	Actions▼
FAC03	Faculty Non-Tenure Track	Full Time	Exempt	Yes	Actions▼
FAC06	Faculty Research Only	Full Time	Exempt	Yes	Actions▼
FAC07	Faculty Teaching Only	Full Time	Exempt	Yes	Actions▼
FAC08	Visiting Faculty Non-Tenure Track	Full Time	Exempt	Yes	Actions▼
FAC09	Visiting Faculty Tenured/Tenure Track	Full Time	Exempt	Yes	Actions▼
FAC10	Faculty and Director	Full Time	Exempt	Yes	Actions▼
FAC11	Faculty/School Dean/Assoc Dean	Full Time	Exempt	Yes	Actions▼

Save **Next >>**

Note: To view the attributes of a Class, go to the Actions column and select View Position Class.

<input checked="" type="radio"/> FAC07	Faculty Teaching Only	Full Time	Exempt	Yes	Actions▼
<input type="radio"/> FAC08	Visiting Faculty Non-Tenure Track	Full Time	Exempt	Yes	Actions▼
<input type="radio"/> FAC09	Visiting Faculty Tenured/Tenure Track	Full Time	Exempt	Yes	Actions▼

Note: Pressing View Position Class may result in a window that warns you that you will lose unsaved data.

Press cancel, Save the Position **Save** and go to Actions > View Position Class again.

Note about the Full-Time Faculty Positions section:

Editing Action

Position Class

Position

Action Summary

A left-hand menu bar appears at this point. It is useful for navigation purposes and provides information about the contents of this Form.

7a. If you had Cloned a position, the Class Title Page will be filled in to show the attributes of the Cloned position. To change the Class code, select the Class code from the list that shows on the page, and press Save.

The screenshot shows a web-based application interface for managing position classes. At the top, there's a navigation bar with links for Home, Positions (which is the active tab), Position Classes, My Profile, and Help. A user profile for Jill Smith is shown, indicating 0 messages, with links for Key Contact, logout, and a search bar. Below the navigation is a breadcrumb trail: Actions / ... / Create New Faculty Position / Professor - American History / Edit. The main content area has a title "Position Class" and a sub-section "Selected Position Class". On the left, a sidebar titled "Editing Action" shows "Position Class" selected, with "Position" checked and "Action Summary" listed. The main form contains a section "Title Details" under "Title Information". A table lists various attributes with their current values:

Position Class Title	Faculty Teaching Only
Employee Class Code	FB
Benefits Eligible	Yes
FT/PT Indicator	Full Time
Hours per day	7
Position Class Code	FAC07
Exempt Indicator	Exempt

At the top right of the main form, there are "Save" and "Next >>" buttons.

The remaining steps in Cloning a Position are the same as the steps described in this section. However you will notice that many of the fields have already been filled in. You may edit, add or delete the field values directly on the form.

8. The Position Details page is the start of the Positions Form.
 ➤ Fields with an * are required.

The screenshot shows a web-based application interface for creating a new faculty position. The top navigation bar includes links for Home, Positions, Position Classes, My Profile, and Help. A user profile for Jill Smith is shown, along with links for Key Contact, logout, and a message center indicating 0 messages. The main content area is titled "Position Details Form". On the left, a sidebar titled "Editing Action" lists "Position Class" (selected), "Position", and "Action Summary". The main form area has a title "Position" with buttons for Save, << Prev, and Next >>. It includes a "Check spelling" link and a note "Action Only (not in library)". Below this are fields for "Action Number" (containing "2012011FT", which is circled in yellow), "Funding Type" (set to "New Funding"), and "Reallocated from a discontinued position?".

Position Details Form	
Field	Notation about the Field
Action Only section (The fields in this section are tied to this action only, not written to the Position Library and not viewable to the applicant or to the employee.)	
Action Number	System auto-assigned.
Funding Type	Select one of the valid values: New Funding or Reallocated
Reallocated from a discontinued position?	<p>Answer this question if the answer to the Funding type (above) is 'Reallocated'. Possible values are Yes or No.</p> <ul style="list-style-type: none"> If you select No, it means that the position is NOT reallocated from a discontinued position, than the position is reallocated from a non-salary source. Please provide the Non-Salary Source in the field below. If you select Yes, please provide the Discontinued Position # and Position Title below.
Discontinued Position Number	Fill these in this question if the answer to the Reallocated from a discontinued position question (above) is Yes.
Discontinued Position Title	
Non Salary Source	Fill these in this question if the answer to the Reallocated from a discontinued position question (above) is No. If the position is NOT reallocated from a discontinued position, then the position is reallocated from a non-salary source.
Position Information Section (These fields are required for Banner)	
Position Title	Can be edited
Position Number	System will auto-assign
Grade	Select 'FAC'
Reports To	Enter the name of the individual or the Position # to which this position will report.
Job Code	If you know this, enter the values and HR/Comp will verify. You may skip these fields.
Census Code	
Fiscal Year	Select the fiscal year in which you will start using this position.
Position Type	Select Single or Pooled. Pooled would be selected if the position is meant to have more than one employee hired into it.
Position Status	Select Active

Position Funding Information Section

Banner Finance Help link	Links to the Banner Finance Help page to look up Index numbers.
Add Position Funding Entry	Opens a view to 3 fields for Index, Account and percent. If percent is less than 100%, please press the Entry button again to submit additional entries until all entries sum up to 100%. This will not be validated by the system, please take care to ensure the total is 100%.

9. Press next to continue [Next >>](#)

10. The Summary page appears next. Here, you can review all the entries you have made, and edit the information before submission. Press the Edit link to make changes.

➤ Note the following 5 features of this page:

- 1) Current Status: This reflects the stage in the Workflow. This value changes along the steps in the workflow.
- 2) Owner: This also reflects the stage in the Workflow. This value changes along the steps in the workflow.
- 3) History tab: View the changes and workflow steps that have transpired during the life of the Position.
- 4) Settings tab: View the Position's Org Security fields, and make any edits on this page.
- 5) Position Class Code: Based on the code you selected earlier, the Class attributes are now displayed on this page.

The screenshot shows the 'Create New Faculty Position' interface. At the top, there are tabs for Home, Positions (which is selected), Position Classes, My Profile, and Help. Below the tabs, it says 'Jill Smith, you have 0 messages.' and has links for Key Contact, logout, Actions, Create New Faculty Position, New Position definition, and Summary. The main title is 'Create New Faculty Position: Professor - European History (Full-Time Faculty) [Edit](#)'. A note says 'Current Status: Draft'. To the right, it shows 'Created by: Jill Smith' and 'Owner: Jill Smith'. Below this, there are three tabs: Summary (selected), History, and Settings. The 'Summary' tab has a 'Position Class' section with a checked checkbox and an 'Edit' link. The 'History' and 'Settings' tabs are also visible. The 'Title Information' section contains the following table:

Position Class Title	Faculty Teaching Only
Employee Class Code	FB
Benefits Eligible	Yes
FT/PT Indicator	Full Time
Hours per day	7
Position Class Code	FAC07
Exempt Indicator	Exempt

11. Press the Take Action on Action button

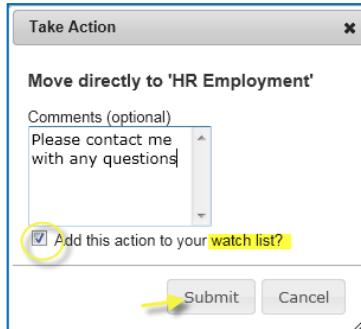


The **Take Action** selection will move this Position action to the next step in the Workflow (see the Flow Charts). Four choices are:

- **Keep working on this Action:** The saves the form and allows you to go back in later and continue working on it before taking action.
- **Cancel Action:** This equals 'Disapproval' and the Position will not be able to be re-activated later.
- **HR Employment:** This moves the action 'forward' in the workflow.
- **Originator:** This moves the action 'backward' in the workflow.

12. Select HR Employment

13. The Take Action window appears next.



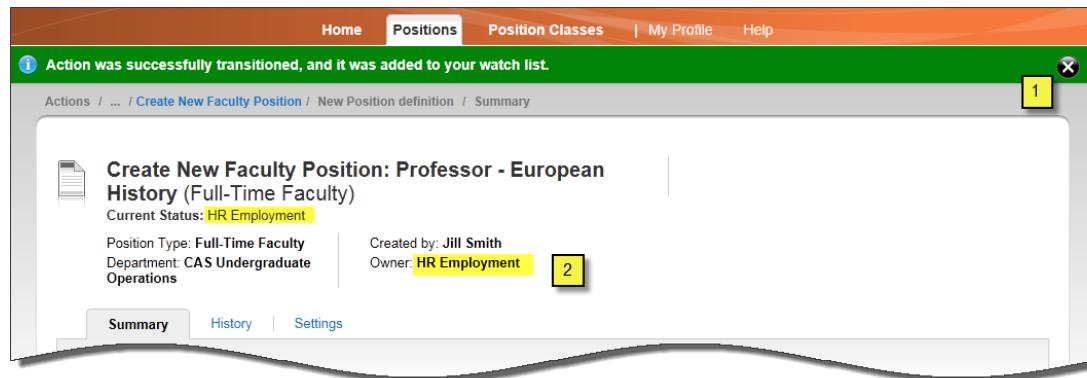
The Take Action window:

- You can enter a **comment** which would appear in the transition email to HR/Employment. (Comments do not get stored in the Position library).
- The checkbox for "**Add this action to your watch list?**" is defaulted as checked. You can monitor the subsequent activity of this action using your Watch List.

14. Press Submit

15. The next page shows the results of your submission:

- 1) Green bar with the 'success' message appears next (press the x icon to close the green bar). If this bar is red you will see an error message, typically indicative of a missed required field. You can go back in and edit the form and re-submit.
- 2) Status and Owner indicators now show **HR Employment**. You now cannot edit the Position Action.

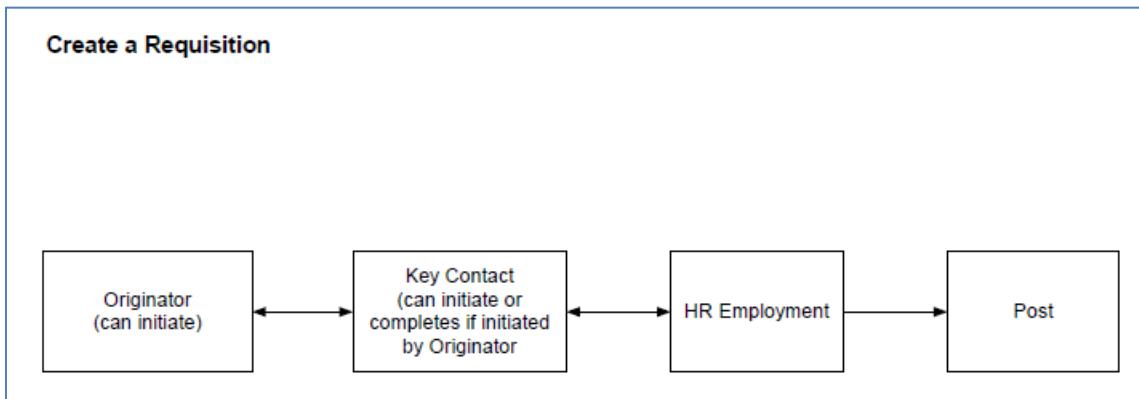


What happens next? HR/Employment will review and either send back for any corrective action or simply create the Position in Banner. This Position can be used to create the requisition or selected when you initiate the Hiring Proposal.

Requisitions and Postings

Staff

Create Staff Requisition



Steps to Create a Staff Requisition

1. Obtain the **Action #** of the approved Position on which the new Requisition will be based. It will appear in the email you received (notification that the Position is approved), or you may look it up in PeopleAdmin:

- 1) Go to Positions Module
- 2) Change role to Originator or a Key Contact.
- 3) From the Positions tab, select Staff Actions
- 4) Note the Action # on the list of Staff Actions, far left column.

The screenshot shows the PeopleAdmin interface with the 'POSITION MANAGEMENT' tab selected. In the top right, there are notifications for 'Inbox' (1), 'Watch List' (2), and 'Logout'. The main menu has tabs for 'Home', 'Positions' (selected), 'Position Classes', 'My Profile', and 'Help'. Under 'Positions', a dropdown menu shows 'Staff', 'Staff Actions' (selected), 'Full-Time Faculty', 'Full-Time Faculty Actions', 'Part-Time Faculty', and 'Part-Time Faculty Actions'. On the left, a sidebar for 'Actions / Staff' includes 'Staff Actions' with search and add column options. Below is a table titled 'Staff Position Actions' with one item found: 'Saved Search: "Staff Position Actions" (1 Item Found)'. The table columns are: Action Number, Position Number, Position Title, Action Name, Action Workflow State, Last Updated, and Actions. The first row shows: Action Number 4 (circled in yellow), Position Number 503635, Position Title Sr. Academic Coordinator, Action Name Modify Administrative/Professional (AP) Position: Sr. Academic Coordinator, Action Workflow State Position Updated, Last Updated November 12, 2011 at 11:26 am, and Actions (dropdown).

2. To Create a Requisition:

- 1) Switch to the Applicant Tracking module
- 2) Select your role.
- 3) Go to Requisitions – Staff

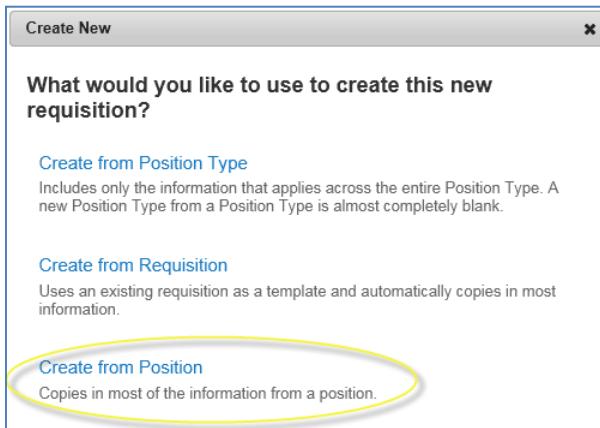
The screenshot shows the PeopleAdmin interface with the 'APPLICANT TRACKING' tab selected. In the top right, there are notifications for 'Inbox' (1), 'Watch List' (2), and 'Logout'. The main menu has tabs for 'Home', 'Requisitions' (selected), 'Hiring Proposals', 'My Profile', and 'Help'. Under 'Requisitions', a dropdown menu shows 'Staff' (selected), 'Full-Time Faculty', and 'Part-Time Faculty'. The main area displays a table with three columns: 'Action Number', 'Position Number', and 'Position Title'. The table shows one item: Action Number 4 (circled in yellow), Position Number 503635, and Position Title Sr. Academic Coordinator.

3. Press the Create New Requisition button

The screenshot shows the PeopleAdmin interface with the 'Requisitions' tab selected. In the top right, there are notifications for 'Inbox' (1), 'Watch List' (2), and 'Logout'. The main menu has tabs for 'Home', 'Requisitions' (selected), 'Hiring Proposals', 'My Profile', and 'Help'. Below the menu, a message says 'Jill Smith, you have 0 messages.' A 'Key Contact' dropdown and 'Logout' link are also present. At the bottom right, a large orange button with the text 'Create New Requisition' is highlighted with a yellow starburst effect.

The following three options are provided for you next.

- i. Create from Position Type – very rarely used.
- ii. Create from Requisition – used when another Requisition is attached to the Position to be filled.
- iii. **Create from Position** – this is recommended for most Requisitions



4. A listing of Positions will appear on the next page. This is your Positions Library.
 - Note: You can have only 1 open Requisition tied to a single Position at one time. If you plan on using a Requisition to hire more than one person, you will need to open a single Requisition, and then at the time of Hire, you would change the Position number that is defaulted, to another approved Position. The ratio of Positions to Employees is 1:1.
5. On the row of the Position on which the new Requisition will be based, click on View, and Select **Create From**.
 - Note: Using the View link, if you see options of 'Requisition Outstanding' or 'Action Outstanding' this will indicate that outstanding activities need to be completed before you can use this Position to create a Requisition.

Home Requisitions Hiring Proposals | My Profile Help

Jill Smith, you have 0 messages. Key Contact logout

Requisitions / Staff / Create from Position

Staff Positions

Open Saved Search ▾ Search: Hide search options

Add Column:

Ad hoc Search Staff Positions

Saved Search: "Staff Positions" (2932 Items Found)

« Previous 1 2 3 4 5 6 7 8 9 ... 39 40 Next »

Position Number	Position Title	Department	Employee Last Name	Employee First Name	(Actions)
502510	Program Manager-Pharm Ex Ed.	Pharmacy OEE - 116600 (116600)			Actions▼
503635	Sr. Academic Coordinator	CAS Undergraduate Operations - 128400 (128400)			Actions▼
501989	English SAT Instructor-Balfour	Balfour Academy - 132060 (132060)			Actions▼

6. The New Requisition Form appears next.

New Requisition Form	
Field	Notation about the Field
Posting Title	Defaults from the Position, you can change the Title here.
Organizational Unit Section	
Executive Level	Organization fields default from the Position.
Division	
Department	
Applicant Workflow Section	
Workflow State	Defaults to 'Facilitator Only Review' – this means that the Facilitator is the ONLY person who can currently see any applicants (internal or external) that have applied. The Facilitator MUST move the Applicant(s) to the State of 'Reviewed by Facilitator' in order for Search Committee members to see applicants.
References Section	
Accept References	DO NOT USE for Staff Req's. This is ONLY used for Faculty.
Online Applications Section	
Accept Online Applications?	Defaults as checked, which indicates you will accept online applicants through PeopleAdmin. You may uncheck this box if you intend to fill this Req with an applicant sourced from another method such as a Search Firm. By unchecking this box, applicants will see this posting but will not be able to apply online.
Special Offline Application Instructions	If you uncheck the above box, please enter instructions for applicants on how to apply, ie., "Thank you for your interest. Please call John Smith at the Recruitment Firm, 800-555-1212, to receive instructions on how to apply".

7. Next, press the **Create New Requisition** button.

8. The Posting Details page appears next.

The screenshot shows a software interface titled 'Editing Requisition'. On the left, a sidebar lists sections: 'Posting Details' (selected), 'Guest User', 'Supporting Documents', 'Applicant Documents', 'Posting Specific Appli...', 'Interview Team', 'Ranking Criteria', and 'Summary'. The main area is titled 'Posting Details' with a 'Save' button and a 'Next >' button. A message at the top says 'Requisition was successfully created.' Below it, a note says: '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 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.' A 'Check spelling' dropdown is also present.

Posting Details Form	
Field	Notation about the Field
Posting Detail Information section	
Position Action Number	Required field: Mentioned in Step 1 of this section.
Posting Title	Required field: This is the Title that will appear to applicants, in the posting. It is defaulted from the Position; you can change it here. (Changing it here will only impact the Posting, not the Req or the Position)
Division/College (Posting) Interdisciplinary Division/College	These fields will be displayed on the Posting
Full/Part Time Benefits Eligible Grade Hours per Day	Defaulted from Position; cannot edit
Hours per week	Multiply the value in Hours per day by 5 and enter the result in this field.
Location	This is where the job will be located. Select from the drop-down choices.
Requisition Number	Auto-assigned value.
Special Offline Application Instructions	The text will default in if you entered it on the first screen and will be visible to applicants on the posting. This is the field that is used only in the cases where another source will be used to receive applications. If this field is blank, and you intend on accepting online applicants, please do not enter any information or instructions in this field.
Position Summary Qualifications	Position Summary and Qualifications data will default from the Position if available. Otherwise, enter text in these fields. This information will be visible to applicants on the Posting.
Additional Information	Enter any additional information for applicants
Posting Date	Enter a date when you would like the posting to appear to applicants online. If you enter today's date, it will automatically be posted online as soon as it is approved. You may also enter a date in the future, and it will automatically be posted online on that date, after it is approved.
Close Date	You may enter a date here if you would like the posting to close on a particular date and be removed from the web site. Unless you have a Waiver, (see Posting Waiver Type field below) postings must stay open a minimum of 30 calendar days.

Open until Filled	Check this box if you left the Close date field blank.
Posting Waiver Type	Choices: No Waiver, Full waiver, Partial Waiver. A choice of No Waiver means this Req will be posted. To apply for a waiver, see Step 12.
Pass Message	The default text will appear to applicants once their application is submitted. Please do not edit this message.
Fail Message	The default text will appear to applicants if you choose to use Posting Specific Questions on this requisition. Please do not edit this message.
Quick Link	This link can be used to send to an applicant to apply when you have a full waiver or to send to a friend. Do not click on it now; as you will lose your data.
Minimum Expected Salary	This data has defaulted from the Position and will <u>not be visible</u> to applicants on the Posting.
Maximum Expected Salary	
JobElephant Posting Information section	
Send to JobElephant?	This box defaults as not checked. Check this box if you want Job Elephant to automatically post this Req on the following web sites: HERC.org, NEHERC.org, INSIDEHIGHRED.com, HIGHEREDJOBS.com and IMDIVERSITY.com
Notes for JobElephant	Indicate additional information and/or list additional web sites/publications/newsletters to which JobElephant should post.
Contact Information for JobElephant	Enter the name, phone # and email address of the person with whom JobElephant should be in contact, in regards to this posting.
Inside Higher Ed Category	Select a category from the drop-down values. If you leave these fields blank, JobElephant will select them for you.
HERC Category	
Additional Requisition Information section	
Requisition Facilitator	Select the individual(s) within your division who will be managing the Applicant Pool (i.e. moving an applicant(s) to different states). If you want to select someone outside your division, please contact HR Employment.
Hiring Manager	Enter the name of the person to whom this position would report. This is <u>not visible</u> to applicants on the posting.

9. Press **Next >>**

10. Guest User page: Press the Create Guest User Account to provide a view-only access to this requisition, i.e., a Search Firm. This individual will not be able to leave comments in the system or rank applicants.

- The Username and password are defaulted for you; please enter the email address.

11. Press **Next >>**

12. Supporting Documents Page: You may attach documents to this Posting (not visible to Applicants). Your choices in adding a document are:

- Upload New – browse to a file on your computer and upload.
- Create New – use the online content tool to create a document to be included with this Req.
- Choose Existing – if you have documents previously uploaded into this site, you can choose them here.

13. Press **Next >>**

14. Applicant Documents: On this page you will see a list of document names. A checkbox in the 'Included' column means that the document will be listed as Optional to the applicant. A checkbox in both the Included and Required columns means that the applicant will be asked to upload that document as a required part of the application; the applicant will not be able to complete their application unless that document is uploaded.

Order	Name	Included?	Required?
1	Resume	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Cover Letter	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	Transcripts	<input type="checkbox"/>	<input type="checkbox"/>
4	Letter Of Recommendation 1		

15. Press **Next >>**

16. Posting Specific Applicant Questions: In this section, you may set up questions and answer choices that applicants will fill in during the application process. Answers can have ratings associated with them which may help in evaluating an applicant pool. These are known as "knock out" questions.

- 1) Press Add a Question
- 2) A list of available questions will appear in a new window. Select a question, and the list of possible answers appears.
- 3) Press Submit.

Position	Required	Category	Question	Status
1	Add a question			

Available Supplemental Questions

Category: Any Keyword:

Add Category Question

Uncategorized How did you hear about this employment opportunity?

2

Can't find the one you want? [Add a new one](#)

3 Submit Cancel

- 4) If you would like to write and add a new question, press the **Add a new one** link. This new question will be automatically routed to Human Resources and upon their approval; this question will be displayed on the posting.
- 5) Fill in the fields indicated
- 6) Press Submit

Add a Question

Available Supplemental Questions

Category: Any Keyword:

Add Category Question

Uncategorized How did you hear about this employment opportunity?

Can't find the one you want? [Add a new one](#)

Submit Cancel

Add a Question

Questions defined here will be "pending" approval and will not be available for use in other areas of the system until they have been approved.

Name * 5

Category Experience

Question *

Possible Answers

Open Ended Answers

Predefined Answers

Empty answers will be excluded.
Click and drag possible answers to reorder them.

Possible Answer 1: Yes

Possible Answer 2: No, I cannot travel

Possible Answer 3: No, I can travel 25% of the time

Possible Answer 4: No, I can travel 10% of the time

Possible Answer 5:

6 Submit Cancel

- 7) Next, click on the question name.
- 8) Assign points to each answer
- 9) Choose answer that is automatically disqualifying. (On Step 8 of this section, you have access to a field which allows you to display a 'Fail' message to the applicant in the event this answer is chosen).

The screenshot shows a table titled 'Included Supplemental Questions'. The columns are: Position, Required, Category, Question, and Status. There are three rows:

Position	Required	Category	Question	Status
1	<input type="checkbox"/>	Uncategorized	How did you hear about this employment opportunity?	active <input checked="" type="checkbox"/>
2	<input type="checkbox"/>	Education	Do you have a Bachelor's degree	active <input checked="" type="checkbox"/>
3	<input type="checkbox"/>	Experience	Are you able to Travel for at least 50% of the time?	pending <input checked="" type="checkbox"/>

A yellow box highlights the number '7' next to the third row. Below the table, a section titled 'Possible Answers: Predefined Options' shows four options with their points and disqualification status:

Answer	Points	Disqualifying
1. Yes	8	<input type="checkbox"/>
2. No, I cannot travel	0	<input checked="" type="checkbox"/>
3. No, I can travel 25% of the time	50	<input type="checkbox"/>
4. No, I can travel 10% of the time	25	<input type="checkbox"/>

17. Press **Next >>**

18. Search Committee: You may select NEU staff members to serve on a Search Committee. These individuals will be able to rank applicants based on established Ranking Criteria.

- To search for an NEU employee,
 - 1) Enter the name
 - 2) Press Search
 - 3) Click the Add Member button from the list of search results.
 - To make a person the **Search Committee Chair**, check the box 'Make Member the Committee Chair'. **This person will be able to view all the comments from the Search Committee. Other Search Committee members can only view their own comments.**

The screenshot shows the 'Search Committee' page. At the top, there are tabs: Home, Requisitions, Hiring Proposals, My Profile, Help, and a user info bar for Jill Smith. The main area has tabs: Editing Requisition, Search Committee, Search Committee Members, and New Search Committee Member.

Editing Requisition tab is active, showing sections for Posting Details, Guest User, Supporting Documents, Applicant Documents, and Posting Specific Appl... (with a blue checkmark). The **Search Committee** tab is also active, showing a list of members and a search interface.

Search Committee Members section: No Search Committee Members have been assigned to this Requisition yet.

Search section: Find a User to assign as a Search Committee Member. It includes fields for Name (Jeffrey Wormuth), Email Address (emailaddress@zed.zed), Add Member button (highlighted with a yellow box labeled '3'), and a checkbox for 'Make Member The Committee Chair' (highlighted with a yellow box labeled '3').

New Search Committee Member section: Request that someone be granted access to the system for the purpose of serving as a Search Committee Member. It includes fields for First Name, Last Name (highlighted with a yellow box labeled '1'), Email Address, and a Search button (highlighted with a yellow box labeled '2'). A note says: 'Required fields are indicated with an asterisk (*).'

- New Search Committee Member: If you cannot find an individual in the Search above, and you would like them to be able to view and rank applicants, please complete the form below.

- Enter the name, email only and press submit.

New Search Committee Member

Request that someone be granted access to the system for the purpose of serving as a Search Committee Member.

Required fields are indicated with an asterisk (*).

Account Information

Please enter the following information to create an account for a new Search Committee Member.

* First Name	Mary
* Last Name	McDonald
* Email	mcdonald@zed.zed
* Username	

Submit 

Save **<< Prev** **Next >>**

19. Press **Next >>**

20. Ranking Criteria: In this section, you may set up evaluative questions for use by yourself and a Search Committee to assist with the selection decision.

- 1) Press Add a Criterion
- 2) Select a Question, if any are available.
- 3) Select the Applicant workflow state, at which time the Search Committee members will be able to enter their comments / answers.

The screenshot shows the 'Requisitions' tab selected in the top navigation bar. Below it, the 'Edit: Ranking Criteria' page is displayed. On the left, a sidebar lists various requisition details, with 'Ranking Criteria' currently selected. The main area shows a table of 'Included Evaluative Criteria' with columns for Category, Description, Weight, Workflow State, and Status. A red 'Add a Criterion' button is visible. A modal window titled 'Add a Ranking Criterion' is open, listing 'Available Evaluative Criteria'. One item, 'Comments only', is checked and highlighted with a yellow box. The number '2' is also highlighted with a yellow box next to it. At the bottom of the modal, there are 'Submit' and 'Cancel' buttons. Below the modal, the 'Applicant workflow state' dropdown is shown with the value 'Facilitator Only Review' highlighted with a yellow box. The number '3' is also highlighted with a yellow box next to it.

To add a new Question:

- If you would like to write and add a new question, press the **Add a new one** link. This new question will be automatically routed to Human Resources and upon their approval, this question will be available.
- Fill in the fields indicated
- Press Submit

Add a Ranking Criterion

Name *	Recommend for another position?
Label *	Misc
Category	Please select a category ▾
Description * If this applicant is not chosen for this position, what instead do you think would be a good fit for this applicant at NEU? Would you recommend hiring this applicant for another NEU position?	
Possible Answers <input checked="" type="radio"/> Open Ended Answers <input type="radio"/> Predefined Answers	
<input style="background-color: #e67e22; color: white; border-radius: 5px; padding: 5px; margin-right: 10px;" type="button" value="Submit"/> <input type="button" value="Cancel"/>	

- Press the question link and designate the workflow state at which time the search committee members will be able to enter their comments / answers.

Ranking Criteria

Included Evaluative Criteria					<input type="button" value="Save"/>	<input type="button" value="<< Prev"/>	<input type="button" value="Next >>"/>
Category	Description	Weight	Workflow State	Status	<input type="button" value="Add a Criterion"/>		
Uncategorized	Has applicant worked in a higher ed institution for a minimum of 2 years?		Facilitator Only Review	active	<input type="button" value="X"/>		
Uncategorized	Comments only		Interviewed by Facilitator	active	<input type="button" value="X"/>		
Uncategorized	If this applicant is not chosen for this position, what instead do you think would be a good fit for this applicant at NEU? Would you recommend hiring this applicant for another NEU position?		Interviewed by Facilitator	pending	<input type="button" value="X"/>		
Name: Recommend for another position? Label: Misc Workflow State : Interviewed by Facilitator					<input type="button" value="Save"/> <input type="button" value="<< Prev"/> <input type="button" value="Next >>"/>		

21. Press **Next >>**

Summary Page: Here you can review the entries you have made, and if you need to change anything, press Edit. You can also see an applicant's view of the posting by clicking on the link 'See how Requisition looks to an Applicant'.

- Tabs on this page:
 - History – This displays all the historical transaction (and comments) of the Requisition, as it moves through the Workflow.
 - Settings – This is where you can view the Organization fields (HR View)
 - Hiring Proposals – View all Hiring Proposals here.
 - Associated Position – This shows you detailed Position information.
 - Reports - Provides summary statistics on the applicant pool for EEO review.

The screenshot shows a web-based application interface for managing requisitions. At the top, there is a navigation bar with links for Home, Requisitions, Hiring Proposals, My Profile, and Help. A green banner at the top indicates that a requisition was successfully updated. Below the banner, the main content area shows a requisition for a 'Sr. Academic Coordinator (Staff)' with a current status of 'Draft'. The requisition details include position type ('Staff'), department ('CAS Undergraduate Operations - 128400'), and creation information ('Created by: Jill Smith', 'Owner: Jill Smith'). To the right of the details is a vertical toolbar with options: 'Take Action On Requisition' (with a dropdown arrow), 'See how Requisition looks to Applicant' (with a star icon), 'Print Preview (Applicant View)', and 'Print Preview'. Below the toolbar, there are tabs for 'Summary', 'History', 'Settings', 'Hiring Proposals', and 'Associated Position'. The 'Summary' tab is selected. A message box contains instructions for taking action on the requisition, mentioning 'Workflow Action', 'Section Name', and 'Posting Page'. Below the message box, there is a section titled 'Posting Details' with an 'Edit' link. Underneath this, there is a table for 'Posting Detail Information' with columns for 'Position Action Number' (2012180PA), 'Posting Title' (Sr. Academic Coordinator), and 'College' (College of Business Administration). A blue arrow points from the text 'Select HR Employment' in the following step description to the 'HR Employment (move to HR Employment)' option in the dropdown menu.

22. Press the 'Take Action on Requisition' button

Take Action On Requisition ▾

WORKFLOW ACTIONS

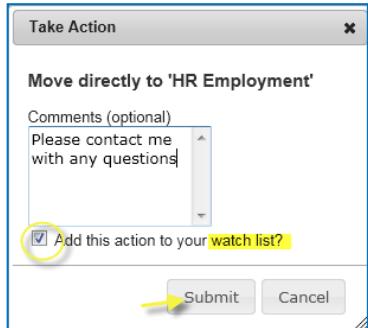
- [Keep working on this Requisition](#)
- [HR Employment \(move to HR Employment\)](#) ←
- [Originator \(move to Originator\)](#)
- [Canceled \(move to Canceled\)](#)

The **Take Action** selection will move this Requisition to the next step in the Workflow (see the Flow Charts). Four choices are:

- **Keep working on this Action:** The saves the form and allows you to go back in later and continue working on it before taking action.
- **HR Employment:** This moves the action 'forward' in the workflow.
- **Originator:** This moves the action 'backward' in the workflow.
- **Canceled:** This equals 'Disapproval' and the Req will not be able to be re-activated later.

23. Select HR Employment

24. The Take Action window appears next.



The Take Action window:

- You can enter a **comment** which would appear in the transition email to HR/Employment. (Comments do not get stored in the Req or Posting).
- The checkbox for “**Add this action to your watch list?**” is defaulted as checked. You can monitor the subsequent activity of this action using your Watch List.

25. The next page shows the results of your submission:

- Green bar with the ‘success’ message appears next (press the x icon to close the green bar). If this bar is red you will see an error message, typically indicative of a missed required field. You can go back in and edit the form and re-submit.
- Status and Owner indicators now show **HR Employment**. You now cannot edit the Requisition.

The screenshot shows a web interface for managing requisitions. The top navigation bar includes Home, Requisitions, Hiring Proposals, My Profile, and Help. A green success message at the top states: "Requisition was successfully transitioned, and it was added to your watch list." Below this, the main content area displays a requisition summary for "Sr. Academic Coordinator (Staff)". Key details shown include:
- Current Status: **HR Employment**
- Position Type: Staff
- Department: CAS Undergraduate Operations - 128400
- Created by: Jill Smith
- Owner: **HR Employment**
On the right side, there are links for "See how Requisition looks to Applicant", "Print Preview (Applicant View)", and "Print Preview".

Review / Edit / Approve Staff Posting

A Key Contact will review a Posting when an Originator has created one and has moved it along the workflow to the Key Contact. HR/Employment will review and approve a posting that has been moved along in the workflow from the Key Contact.

Steps to Review/Edit/Approve a Staff Posting

1. Go to Applicant Tracking Module
2. Change role to Key Contact.
3. From the Home page, go to the Inbox and click on the Requisition Title.

The screenshot shows the PeopleAdmin Applicant Tracking System interface. At the top, there's a blue header bar with the 'PeopleAdmin' logo and 'APPLICANT TRACKING' dropdown. Below the header, a navigation bar includes 'Home', 'Requisitions', 'Hiring Proposals', 'My Profile', and 'Help'. A message bar says 'Jill Smith, you have 0 messages.' and shows a 'Key Contact' link. On the left, a sidebar has 'Shortcuts' for creating new requisitions and 'My Links' for training videos, applicant portal, and customer login. The main content area is titled 'Welcome to your Online Recruitment System'. It features an 'Alerts' section with one message about a demo presentation. Below that is the 'Inbox' section, which displays 5 items for the 'Key Contact' group. The inbox table has columns for 'Job Title', 'Type', 'Current State', and 'Owner'. One item in the list is highlighted with a yellow box labeled '3'.

4. The Summary page appears next.
 - Tabs on this page:
 - History – This displays all the historical transaction (and comments) of the Requisition, as it moves through the Workflow.
 - Settings – This is where you can view the Organization fields
 - Applicants – Those who apply to this posting will be listed here.
 - Hiring Proposals – View all associated Hiring Proposals here.
 - Associated Position – This shows you detailed Position information.
 - Reports - Provides summary statistics on the applicant pool for EEO review.
5. To Review the Requisition, scroll the length of this summary page. You will see all sections and fields of the form here.
6. To Edit the Requisition, press any of the Edit links

Requisition: Staff Coordinator (Staff) [Edit](#) [6]

Current Status: Key Contact

Position Type: Staff
Department: Project Management - 173200

Created by: Jill Smith
Owner: Key Contact

[Take Action On Requisition](#) [5]

- ★ See how Requisition looks to Applicant
- [Print Preview \(Applicant View\)](#)
- [Print Preview](#)

[Summary](#) [History](#) | [Settings](#) | [Applicants](#) | [Reports](#) | [Hiring Proposals](#) | [Associated Position](#)

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 the posting 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 the popup 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 section has an orange icon with an exclamation point, you will need to review this section and make necessary corrections before moving to the next step in the workflow.

Posting Details [Edit](#) [6]

Posting Detail Information

Position Action Number	A1234568
Posting Title	Staff Coordinator
Posting Description	College of Computer and Inf...

7. Type your change in the field(s) as necessary.
8. Press Save
9. You can navigate to other fields in the Req by using the left hand menu items or by clicking the 'Next' button on each page. To finalize your edits, go to the Summary page.

The screenshot shows the 'Posting Details' screen in the PeopleAdmin application. The main area displays three required information fields: Position Action Number (A1234568), Posting Title (Staff Coordinator - CIS), and Division/College (Posting). At the top right, there are 'Save' and 'Next >' buttons, with 'Save' highlighted by a yellow box. A yellow arrow points to the 'Summary' link in the left sidebar, which is also highlighted by a yellow box.

10. To Approve this Requisition (move it forward in the next step of the workflow) press the 'Take Action on Requisition' button.

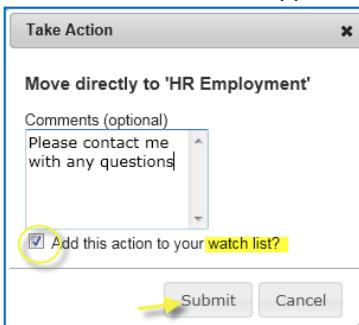


The **Take Action** selection will move this Requisition to the next step in the Workflow (see the Flow Charts). Four choices are:

- **Keep working on this Action:** The saves the form and allows you to go back in later and continue working on it before taking action.
- **HR Employment:** This moves the action 'forward' in the workflow.
- **Return to Originator:** This moves the action 'backward' in the workflow.
- **Canceled:** This equals 'Disapproval' and the Req will not be able to be re-activated later.

11. Select HR Employment

12. The Take Action window appears next.



The Take Action window:

- You can enter a **comment** which would appear in the transition email to HR/Employment. (Comments do not get stored in the Req or Posting).
- The checkbox for "**Add this action to your watch list?**" is defaulted as checked. You can monitor the subsequent activity of this action using your Watch List.

13. The next page shows the results of your submission:

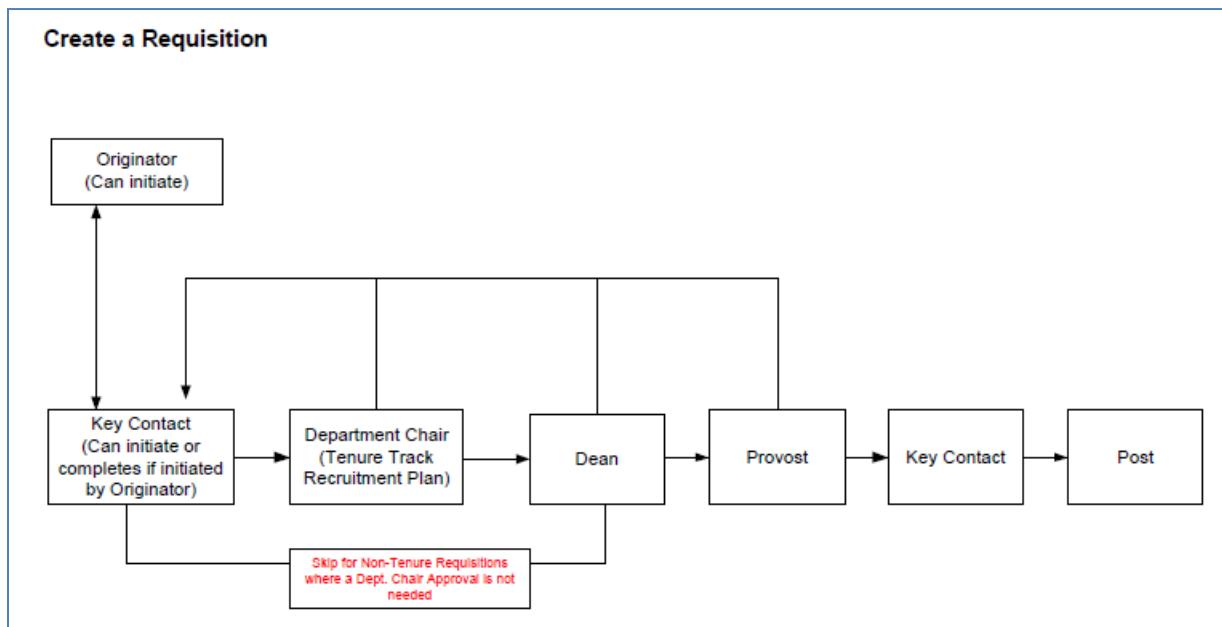
- Green bar with the 'success' message appears next (press the x icon  to close the green bar). If this bar is red you will see an error message, typically indicative of a missed required field. You can go back in and edit the form and re-submit.
- Status and Owner indicators now show **HR Employment**. You now cannot edit the Requisition.



The screenshot shows a web-based application interface for managing requisitions. At the top, a green header bar displays the message "Requisition was successfully transitioned". Below this, the main navigation menu includes "Home", "Requisitions" (which is currently selected), "Hiring Proposals", "My Profile", and "Help". The user's name, "Jill Smith", is shown along with a message about having 0 messages and options to set "Key Contact" or "logout". The main content area is titled "Requisition: Staff Coordinator - CIS (Staff)". It shows the "Current Status" as "HR Employment". Other details listed include "Position Type: Staff", "Department: Project Management - 173200", "Created by: Jill Smith", and "Owner: HR Employment". To the right of the main content, there are three links: "See how Requisition looks to Applicant" (with a star icon), "Print Preview (Applicant View)" (with a printer icon), and "Print Preview" (with a printer icon).

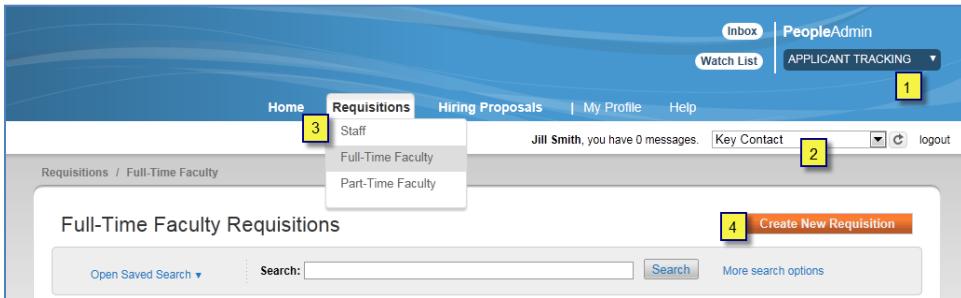
Faculty

Create a Full-Time Faculty Requisition (with a Recruitment Plan)



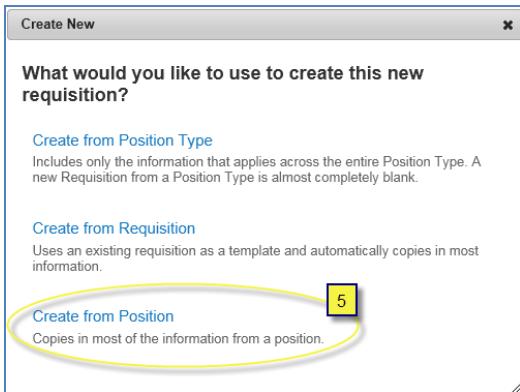
Steps to Create a Faculty Requisition

1. Go to Applicant Tracking Module
2. Change role to Originator or Key Contact.
3. Go to Requisitions > Full-Time Faculty
4. Press Create New Requisition



The following three options are provided for you next.

- Create from Position Type – used when the Position is not determined until the final candidate is selected.
- Create from Requisition – used when another Requisition is similar
- **Create from Position** – this is recommended for most Requisitions



5. Select Create from Position

A listing of Positions will appear on the next page. This is your Positions Library.

- i. Note: You can have only 1 open Requisition tied to a single Position at one time. If you plan on using a Requisition to hire more than one person, you would change the Position number that is defaulted on the Hiring Proposal, to another approved Position.
6. On the row of the Position on which the new Requisition will be based, click on View, and Select Create From.
 - i. Note: Using the Actions link, if you see options of 'Requisition Outstanding' or 'Action Outstanding' this will indicate that outstanding activities need to be completed before you can use this Position to create a Requisition.

The screenshot shows the 'Full-Time Faculty Positions' search results. At the top, there are search filters for 'Ad hoc Search' and 'Faculty Positions'. A saved search titled 'Faculty Positions' (1537 Items Found) is selected. The main table lists positions with columns for Position Title, Position Number, Department, and Actions. The 'Actions' column for the first row ('Professor') contains a dropdown menu with 'View' and 'Create From' options. The 'Create From' option is highlighted with a yellow circle and the number '6' above it. The 'Actions' menu for the second row ('Associate Professor') is also circled with a yellow circle.

Position Title	Position Number	Department	Actions
Distinguished Prof & Chair	500836	Pharmaceutical Sciences - 116300	Actions▼
Professors	500000	Finance Group - 119600	Actions▼
Professor	500001	Counseling and Applied Psychology - 117000	Actions▼
Professor	500004	Chemical Engineering - 123000	6 Actions▼
Associate Professor	500008	Jewish Studies - 130300	View Create From
Associate Professor	500013	Music - 127500	Actions▼

7. The New Requisition Form appears next.

New Requisition Form	
Field	Notation about the Field
Posting Title	Defaults from the Position, you can change the Title here.
Organizational Unit Section	
Executive Level	Organization fields default from the Position.
Division	
Department	
Applicant Workflow Section	
Workflow State	Defaults to 'Review by Facilitator' for all candidates.
References Section (see screen shot and additional information below)	
Accept References Checkbox	Defaults as not checked. You must check this box if you want Referees to be able to electronically submit recommendation letters.
Reference Notification	Please select 'Recommendation Requested'
Recommendation Workflow	Please select 'Recommendation Received'
Recommendation Document Type	Please select 'Recommendation Letter'
Online Applications Section	
Accept Online Applications?	Defaults as checked, which indicates you will accept online applicants through PeopleAdmin. You may uncheck this box if you intend to fill this Req with an applicant sourced from another method such as a Search Firm. By unchecking this box, applicants will see this posting but will not be able to apply online.
Special Offline Application Instructions	If you uncheck the above box, please enter instructions for applicants on how to apply, ie., "Thank you for your interest. Please call John Smith at the Recruitment Firm, 800-555-1212, to receive instructions on how to apply".

References: Checkbox Defaults as not checked. You must check this box if you want Referees to be able to electronically submit recommendation letters. You must select Workflow states in the drop down fields below in order for Referees to receive automatic notifications via email.

References	
<input checked="" type="checkbox"/> Accept references	
Reference Notification	Recommendation Requested
(Optional) Invite References to submit Recommendations when candidate reaches which workflow state?	
Recommendation Workflow	Recommendation Received
(Optional) When all Recommendations have been provided, move to which workflow state?	
Recommendation Document Type	Recommendation Letter
Require document upload when a reference provider submits a Recommendation?	

8. Next, press the **Create New Requisition** button.

9. The Posting Details page appears next.

Posting Details Form	
Field	Notation about the Field
NU Posting Detail Information section	
Posting Title	Required field: This is the Title that will appear to applicants, in the posting. It is defaulted from the Position; you can change it here. (Changing it here will only impact the Posting, not the Position)
Division/College (Posting)	These fields will display on the posting.
Interdisciplinary Division/College	
Full/Part Time	Defaulted from Position; you should not edit.
Benefits Eligible	
Tenure Status	Select: <ul style="list-style-type: none">• Tenure / Tenure Track, or• Non Tenure Track
Location	This is where the job will be located. Select from the drop-down choices.
Requisition Number	Auto-assigned value.
Special Offline Application Instructions	The text will default in if you entered it on the first screen and will be visible to applicants on the posting. This is the field that is used only in the cases where another source will be used to receive applications. If this field is blank, and you intend on accepting online applicants, please do not enter any information or instructions in this field.
Position Summary	Position Summary and Qualifications data will default from the Position if available. Otherwise, enter text in these fields. This information will be visible to applicants on the Posting.
Qualifications	
Additional Information	Enter any additional information for applicants
Posting Date	Enter a date when you would like the posting to appear to applicants online. If you enter today's date, it will automatically be posted online as soon as it is approved. You may also enter a date in the future, and it will automatically be posted online on that date, after it is approved.
Close Date	You may enter a date here if you would like the posting to close on a particular date. Unless you have a Waiver, (see Posting Waiver Type field below) postings must stay open a minimum of 30 calendar days.

Open until Filled	Check this box if you left the Close date field blank.
Requested Posting Waiver Type	Choices: No Waiver, Full waiver, Partial Waiver, Target of Opportunity. A choice of No Waiver means this Req will be posted.
Pass Message	The default text will appear to applicants once their application is submitted. Please do not edit this message.
Fail Message	The default text will appear to applicants if you choose to use Posting Specific Questions on this requisition. Please do not edit this message.
Quick Link	This link can be used to send to an applicant to apply when you have a full waiver or to send to a friend. Do not click on it now; as you will lose your data.
JobElephant Posting Information section	
Send to JobElephant?	This box defaults as not checked. Check the box if you want Job Elephant to automatically post this Req on the following web sites: HERC.org, NEHERC.org, INSIDEHIGHERED.com, HIGHEREDJOBS.com and IMDIVERSITY.com
Notes for JobElephant	Indicate additional information and/or list additional web sites / publications / newsletters / that JobElephant should post to.
Contact Information for JobElephant	Enter the name, phone # and email address of the person with whom JobElephant should be in contact, in regards to this posting.
Inside Higher Ed Category	Select a category from the drop-down values. If you leave these fields blank, JobElephant will select them for you.
HERC Category	
Additional Requisition Information section	
Requisition Facilitator	Select the individual(s) who will be managing the Applicant Pool (i.e. moving a candidate(s) to different states).
Hiring Manager	Enter the name of the person to whom this position would report. This is <u>not visible</u> to applicants on the posting.
Department Chair Approver	Select the individual who will be responsible for completing the Recruitment Plan (i.e., The actual Department Chair or the Search Committee Chair.) If you are creating a non-tenure faculty requisition, you may skip this field.
Additional Recruitment Plan (Tenure Track Only)	
Networks, Organizations and Caucuses	List networks, organizations and caucuses that are oriented to minorities, women and veterans or persons with disabilities to be notified of the position and indicate for each the type of contact to be made (phone, email, letter, combination)
Referrals	Please list the individuals or organizations to be contacted who could refer candidates. Please include the Contact Name and the Location/Institution of each.
Diversity	Please describe any steps you will take related to STRIDE or ADVANCE and to orient the Search Committee to their responsibilities to ensure diversity.
Discipline-Specific National Professional Journal Publication Name	For compliance requirements, a minimum of one discipline-specific, national professional print journal or electronic/web-based journal publication must be included. Please note if using an electronic or web-based national professional journal, the ad must be posted for at least 30 calendar days on the journal's website and documentation of the ad must include evidence of the start and end dates and the text of the actual ad placed from the journal's website.

10. Press **Next >>**

11. Guest User page: Press the Create Guest User Account to provide a view-only access to a non-NEU person, ie., a Search Firm. This individual will not be able to leave comments or rank candidates in the system.

The screenshot shows a web application interface for managing requisitions. At the top, a green banner displays the message "Requisition was successfully updated." Below the banner, the header includes links for Home, Requisitions, Hiring Proposals, My Profile, and Help. The user is logged in as Jill Smith. The main content area is titled "Guest User" and contains instructions about creating a guest user account. A button labeled "Create Guest User Account" is highlighted with a cursor. Navigation buttons "Save", "<< Prev", and "Next >>" are visible at the bottom right of the form.

12. The Username and password are defaulted for you; please enter the email address.

13. Press the Update Guest User Recipient List button

This screenshot continues from the previous one, showing the "Guest User" section. It includes a "Guest User Credentials" section where the username "gu0033" and password "c7f3ce" are entered. Below this is a "Email Addresses of Guest User Recipients" section containing the email address "marymcdonald@gmail.com". A button labeled "Update Guest User Recipient List" is located next to the input field. A yellow box labeled "12" is placed over the recipient list input field, and another yellow box labeled "13" is placed over the "Update Guest User Recipient List" button. A third yellow box labeled "14" is placed over the "Next >>" button at the top right of the form.

14. Press **Next >>**

15. Supporting Documents Page: You may attach documents to this Posting (not visible to Applicants). Your choices in adding a document are:

- Upload New – browse to a file on your computer and upload.
- Create New – use the online content tool to create a document to be included with this Req.
- Choose Existing – if you have documents previously uploaded into this site, you can choose them here.

Requisitions / Full-Time Faculty / Professor - Chemical Engineering (Draft) / Edit: Supporting Documents

Editing Requisition

- Posting Details
- Guest User
- Supporting Documents**
- Applicant Documents
- Posting Specific Appli...
- Search Committee
- Ranking Criteria
- Requested References
- Summary

Supporting Documents

To add a document to the posting, hover over the blue Action text link to the right of the document name.

Documents can be uploaded by browsing for the document or a document can be written or previously selected. Document types that are supported as attachment include .doc, .docx, .pdf, .rtf, .rtx, .txt, .tiff, .tif, .jpeg, .jpe, .jpg, .png, .xls and .xlsx. All documents uploaded will be converted to .pdf for security.

PDF conversion must be completed for the document to be valid when applicable.

Document Type	Name	Status	(Actions)
Miscellaneous			Actions▼
Waiver Approval			Actions▼

Save << Prev Next >>

16. Press **Next >>**

17. Applicant Documents: On this page you will see a list of document names. A checkbox in the 'Included' column means that the document will be listed as Optional to the applicant. A checkbox in both the Included and Required columns means that the applicant will be asked to upload that document as a required part of the application; the applicant will not be able to complete their application unless that document is uploaded.

The screenshot shows the 'Applicant Documents' section of the PeopleAdmin application. The left sidebar lists various sections: Posting Details, Guest User, Supporting Documents, **Applicant Documents**, Posting Specific Appli..., Search Committee, Ranking Criteria, Requested References, and Summary. The 'Applicant Documents' section is currently selected. The main area displays a table of documents with columns for Order, Name, Included?, and Required?. The table rows are:

Order	Name	Included?	Required?
1	Resume	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Cover Letter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	Transcripts	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	Letter Of Recommendation 1	<input type="checkbox"/>	<input type="checkbox"/>

At the top right of the main area are 'Save', '<< Prev', and 'Next >>' buttons. The top navigation bar includes Home, Requisitions, Hiring Proposals, My Profile, Help, and a user profile for Jill Smith.

18. Press **Next >>**

19. Posting Specific Applicant Questions: In this section, you may set up questions and answer choices that applicants will fill in during the application process. Answers can have ratings associated with them which may help in evaluating an applicant pool. These are known as “knock out” questions.

- Press Add a Question
- A list of available questions will appear in a new window. Select a question, and the list of possible answers appears.
- Press Submit.

The screenshot shows the 'Posting Specific Applicant Questions' screen in the PeopleAdmin software. On the left, there's a sidebar titled 'Editing Requisition' with several tabs: 'Posting Details', 'Guest User', 'Supporting Documents', 'Applicant Documents', 'Posting Specific Appli...', 'Search Committee', 'Ranking Criteria', 'Requested References', and 'Summary'. The 'Posting Specific Appli...' tab is currently selected and highlighted in blue. The main content area has a heading 'Posting Specific Applicant Questions' with buttons for 'Save', '<< Prev', and 'Next >>'. Below the heading, there are three paragraphs of instructions: 'Adding New Posting Questions', 'Adding Existing Posting Questions', and 'Assign Points or Disqualifying Responses'. At the bottom of this section is a table header for 'Included Supplemental Questions' with columns for Position, Required, Category, Question, and Status. To the right of the table is a large orange button labeled 'Add a question'. A yellow circle highlights this button. A curved arrow points from the 'Add a question' button down to the 'Add a Question' modal dialog.

Included Supplemental Questions

Position	Required	Category	Question	Status
----------	----------	----------	----------	--------

Add a Question

Available Supplemental Questions

Category: Any Keyword:

Add Category Question

Uncategorized How did you hear about this employment opportunity?

Displaying all 6 Can't find the one you want? Add a new one

Submit Cancel

- If you would like to write and add a new question, press the **Add a new one** link. This new question will be automatically routed to the Provost and upon approval this question will be displayed on the posting.

Add a Question

Available Supplemental Questions

Category: **Any** Keyword:

Add Category Question

Uncategorized How did you hear about this employment opportunity?

Displaying all 6

Can't find the one you want? **Add a new one**

Submit Cancel

- Fill in the fields indicated
- Press Submit

Add a Question

Questions defined here will be "pending" approval and will not be available for use in other areas of the system until they have been approved.

Name *

Category

Question *

Possible Answers

Open Ended Answers Predefined Answers

Empty answers will be excluded.
Click and drag possible answers to reorder them.

Possible Answer 1: Yes x

Possible Answer 2: No, I cannot travel x

Possible Answer 3: No, I can travel 25% of the time x

Possible Answer 4: No, I can travel 10% of the time x

Possible Answer 5: x

Possible Answer 6: x

Submit Cancel

- Next, click on the question name.

The screenshot shows a web-based application interface for managing job postings. At the top, there's a navigation bar with links for Home, Requisitions, Hiring Proposals, My Profile, and Help. The user is logged in as Jill Smith. Below the navigation, the page title is "Requisitions / Full-Time Faculty / Professor - Chemical Engineering (Draft) / Edit: Posting Specific Applicant Questions". On the left, a sidebar titled "Editing Requisition" lists various sections: Posting Details, Guest User, Supporting Documents, Applicant Documents, Posting Specific Appli..., Search Committee, Ranking Criteria, Requested References, and Summary. The main content area is titled "Posting Specific Applicant Questions". It contains several informational paragraphs and a table titled "Included Supplemental Questions". The table has columns for Position, Required, Category, Question, and Status. A row in the table corresponds to the question highlighted in the screenshot. At the bottom right of the main content area are "Save", "<< Prev", and "Next >>" buttons.

- Assign points to each answer
- Choose answer that is automatically disqualifying. (If you choose this, the text in the 'Fail Message' box in Step 9, will appear to the candidates who chooses this answer.)

This screenshot shows the same application interface as the previous one, but it focuses on the "Possible Answers: Predefined Options" section. This section is a table with columns for Answer, Points, and Disqualifying. The table contains four rows of answers. Row 1: "1. Yes" with points "100" and a checked "Disqualifying" box. Row 2: "2. No, I cannot travel" with points "0" and a checked "Disqualifying" box. Row 3: "3. No, I can travel 25% of the time" with points "50" and an unchecked "Disqualifying" box. Row 4: "4. No, I can travel 10% of the time" with points "25" and an unchecked "Disqualifying" box. The "Save", "<< Prev", and "Next >>" buttons are visible at the bottom right.

20. Press **Next >>**

21. Search Committee: You may select NEU staff members to serve on a Search Committee. These individuals will be able to rank applicants based on established Ranking Criteria.

- To search for an NEU employee,
- 4) Enter the name
- 5) Press Search
- 6) Click the Add Member button from the list of search results.
 - To make a person the **Search Committee Chair**, check the box 'Make Member the Committee Chair'. **This person will be able to view all the comments from the Search Committee. Other Search Committee members can only view their own comments.**

Requisitions / Staff / Database Administrator (Draft) / Edit: Search Committee

Editing Requisition

- Posting Details
- Guest User
- Supporting Documents
- Applicant Documents
- Posting Specific Appl...
- Search Committee**
- Ranking Criteria
- Summary

Search Committee

Search Committee Members

No Search Committee Members have been assigned to this Requisition yet.

Search

Find a User to assign as a Search Committee Member.

Name	Email Address	Add Member
Jeffrey Wormuth	emailaddress@zed.zed	<input type="button" value="Add Member"/> <input checked="" type="checkbox"/> Make Member The Committee Chair

First Name
Last Name 1
Email Address
 2

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 (*).

- New Search Committee Member: If you cannot find an individual in the Search above, and you would like them to be able to view and rank applicants, please complete the form below.

- Enter the name, email only and press submit.

New Search Committee Member

Request that someone be granted access to the system for the purpose of serving as a Search Committee Member.

Required fields are indicated with an asterisk (*).

Account Information

Please enter the following information to create an account for a new Search Committee Member.

* First Name	Mary
* Last Name	McDonald
* Email	mcdonald@zed.zed
* Username	

Submit 

Save **<< Prev** **Next >>**

22. Press **Next >>**

23. Ranking Criteria: In this section, you may set up evaluative questions for use by yourself and search committee to assist with the selection decision.

- Press Add a Criterion
- Select a Question
- Select the Applicant workflow state, at which time the search committee members will be able to enter their comments / answers.

The screenshot shows the 'Ranking Criteria' page in the PeopleAdmin software. At the top, there's a navigation bar with links for Home, Requisitions, Hiring Proposals, My Profile, and Help. The user is logged in as Jill Smith. Below the navigation, the page title is 'Requisitions / Full-Time Faculty / Professor - Chemical Engineering (Draft) / Edit: Ranking Criteria'. On the left, a sidebar titled 'Editing Requisition' lists various categories like Posting Details, Supporting Documents, and Search Committee, with 'Ranking Criteria' selected. The main content area is titled 'Ranking Criteria' and contains a table for 'Included Evaluative Criteria' with columns for Category, Description, Weight, Workflow State, and Status. A prominent orange button labeled 'Add a Criterion' is located at the top right of this table. Below this, there's a 'Save' button and navigation links for 'Save', '<< Prev', and 'Next >>'. A large yellow arrow points from the 'Add a Criterion' button down to the 'Available Evaluative Criteria' section. This section has a header 'Available Evaluative Criteria' and includes a search bar for 'Category' (set to 'Any') and 'Keyword'. It lists several evaluative criteria, each with a checkbox and a description. One item, 'Comments only', has its checkbox highlighted with a yellow circle. The 'Available Evaluative Criteria' section also includes a 'Possible Answers' field set to 'Open Ended' and a dropdown menu for 'Applicant workflow state' currently set to 'Review by Facilitator'. At the bottom of the page, there are buttons for 'Submit' and 'Cancel'.

To add a new Question:

- If you would like to write and add a new question, press the **Add a new one** link. This new question will be automatically routed to the Provost and upon approval, this question will be available.
- Fill in the fields indicated
- Press Submit

Add a Ranking Criterion

Name *	Recommend for another position?
Label *	Misc
Category	Please select a category ▾
Description *	If this applicant is not chosen for this position, what instead do you think would be a good fit for this applicant at NEU? Would you recommend hiring this applicant for another NEU position?
Possible Answers	
<input checked="" type="radio"/> Open Ended Answers	
<input type="radio"/> Predefined Answers	
Submit Cancel	

- Press the question link and designate the workflow state at which time the search committee members will be able to enter their comments / answers.

Ranking Criteria

Included Evaluative Criteria					Save	<< Prev	Next >>	
Category	Description	Weight	Workflow State	Status	Add a Criterion			
Uncategorized	Has applicant worked in a higher ed institution for a minimum of 2 years?		Facilitator Only	active		Review		
Uncategorized	Comments only		Interviewed by	active		Facilitator		
Uncategorized	If this applicant is not chosen for this position, what instead do you think would be a good fit for this applicant at NEU? Would you recommend hiring this applicant for another NEU position?		Interviewed by	pending		Facilitator		
Name position?					Recommend for another			
Label					Misc			
Workflow State					Interviewed by Facilitator			
					Save	<< Prev	Next >>	

24. Press **Next >>**

25. Requested References – If a workflow state was selected in the beginning of the Create Requisition process (see page 62) and you enter information in the Requested References section below, Referees will be notified electronically. Otherwise, the candidate will only be required to provide the minimum number of references indicated.

Requested References Form	
Field	Notation about the Field
Reference Collection section	
Minimum number of references required?	Enter a number in these fields
Maximum number of references required?	
On what date would you like to discontinue collection of reference materials?	Date field
How many days prior to the cut off date would you like to send a reminder email to reference providers to submit their reference materials?	Enter a number in this field
Please enter any special instructions that you would like to show the candidate as they are providing references at the time of the application.	Open text
Reference Instructions section	
Please enter the confirmation message that you would like to be shown to the reference provider once they have successfully provided the reference documentation	Open text
Please list any special instructions that you would like to share with the reference provider at the time of submission of the reference materials.	Open text

26. Press **Next >>**

27. Summary Page: Here you can review the entries you have made, and if you need to change anything, press Edit. You can also see an applicant's view of the posting by clicking on the link 'See how Requisition looks to an Applicant'.

➤ Tabs on this page:

- History – This displays all the historical transaction (and comments) of the Requisition, as it moves through the Workflow.
- Settings – This is where you can view the Organization fields
- Hiring Proposals – View all associated Hiring Proposals here.
- Associated Position – This shows you detailed Position information.
- Reports (visible to a Key Contact or OIDE). Provides summary statistics on the applicant pool for EEO review.

The screenshot shows a web-based application interface for managing requisitions. At the top, there is a navigation bar with links for Home, Requisitions, Hiring Proposals, My Profile, and Help. A user profile for 'Jill Smith' is shown, indicating 0 messages and a 'Key Contact' status. Below the navigation, the URL is 'Requisitions / Full-Time Faculty / Professor - Chemical Engineering (Draft) / Summary'. The main content area displays a requisition titled 'Requisition: Professor - Chemical Engineering (Full-Time Faculty)'. It shows the current status as 'Draft', position type as 'Full-Time Faculty', and department as 'Chemical Engineering - 123000'. To the right of the requisition details is a sidebar with a 'Take Action On Requisition' button, which has a yellow arrow pointing to it. Other options in the sidebar include 'See how Requisition looks to Applicant', 'Print Preview (Applicant View)', and 'Print Preview'. Below the sidebar, there are tabs for 'Summary', 'History', 'Settings', 'Hiring Proposals', and 'Associated Position'. A note below the tabs says, 'Please review the details of the posting carefully before continuing.' It provides instructions for taking action, such as selecting a workflow action by hovering over the 'Take Action on this Posting' button, adding a comment, and adding the posting to a watch list. It also mentions that to edit the posting, one should click the 'Edit' link next to the section name in the summary section. The 'Posting Details' section shows the posting title as 'Professor - Chemical Engineering' and the division/college as 'College of Engineering'. There is also a 'Comments' section.

28. Press the 'Take Action on Requisition' button and select Department Chair



The Take Action selection will move this Requisition to the next step in the Workflow (see the Flow Charts). Four choices are:

- **Keep working on this Action:** The saves the form and allows you to go back in later and continue working on it before taking action.
- **Originator:** This moves the action 'backward' in the workflow.
- **Canceled:** This equals 'Disapproval' and the Req will not be able to be re-activated later.
- **Department Chair :** This moves the action 'forward' in the workflow.
- **Send to Dean:** This moves the action 'forward' in the workflow. *

*Send to Dean option: You will have the ability to skip the Department Chair if applicable.

29. The Take Action window appears next.

Take Action

Move directly to 'Department Chair'

Comments (optional)
Please contact me with any Questions. Thank you.

Add this requisition to your **watch list?**

Submit Cancel

The Take Action window:

- You can enter a **comment** which would appear in the transition email to HR/Employment. (Comments do not get stored in the Req or Posting).
- The checkbox for “**Add this action to your watch list?**” is defaulted as checked. You can monitor the subsequent activity of this action using your Watch List.

30. The next page shows the results of your submission:

- Green bar with the ‘success’ message appears next (press the x icon  to close the green bar). If this bar is red you will see an error message, typically indicative of a missed required field. You can go back in and edit the form and re-submit.
- Status and Owner indicators now show **Department Chair**. You now cannot edit the Requisition.

Requisition was successfully transitioned

Watch List APPLICANT TRACKING

Home Requisitions Hiring Proposals | My Profile Help

Jill Smith, you have 0 messages. Key Contact logout

Requisitions / Full-Time Faculty / Professor - Chemical Engineering (Department Chair) / Summary

Requisition: Professor - Chemical Engineering (Full-Time Faculty)

Current Status: **Department Chair**

Position Type: Full-Time Faculty
Department: Chemical Engineering - 123000

Created by: Jill Smith
Owner: **Department Chair**

★ See how Requisition looks to Applicant
Print Preview (Applicant View)
Print Preview

Post a Faculty Requisition

The Provost can move the Requisition 'forward' to the Key Contact as an Approval to Post. The Key Contact will see the Req in their inbox, which will have the Current State of 'Key Contact to Post'.

Steps to Post a Faculty Requisition

1. Go to Applicant Tracking Module
2. Change role to Key Contact
3. From the Home page, go to the Inbox and click on the Requisition Title.

This screenshot shows the PeopleAdmin Applicant Tracking System interface. At the top, there's a navigation bar with links for Home, Requisitions, Hiring Proposals, My Profile, Help, and a dropdown menu for APPLICANT TRACKING. A yellow box labeled '1' highlights the APPLICANT TRACKING dropdown. Below the navigation is a user profile for Jill Smith, showing 0 messages and a 'Key Contact' status, with a yellow box labeled '2' highlighting the 'Key Contact' link. The main content area has a title 'Welcome to your Online Recruitment System'. On the left, there's an 'Alerts' section with one message from the administrator: 'Today's PeopleAdmin Demo is being presented by Liz Mace and Betty Rodriguez.' On the right, there's a 'Shortcuts' panel with links to Create New Staff Requisition, Create New Full-Time Faculty Requisition, and Create New Part-Time Faculty Requisition. Below that is a 'My Links' panel with a 'Useful Links' section containing a 'Training Videos' link (described as helpful videos for staff training) and a 'Your Applicant Portal' link (described as how applicants access the PeopleAdmin system). In the center, there's an 'Inbox' section titled '(5 items need your attention)' displaying items for the 'Key Contact'. It shows a table with columns for Job Title, Type, Current State, and Owner. One item in the table is highlighted with a yellow box labeled '3' and is titled 'Professor of Chemical Engineering'. The 'Current State' column for this item is also highlighted with a yellow box labeled 'Key Contact to Post'. The 'Owner' column shows 'Key Contact'.

4. To Post the Req, click **Take Action On Requisition ▾**
 - Note: The Key Contact has the ability to edit the Req at this point.

This screenshot shows the 'Requisition: Professor of Chemical Engineering (Full-Time Faculty)' details page. At the top, there's a navigation bar with Home, Requisitions, Hiring Proposals, My Profile, Help, and a dropdown for APPLICANT TRACKING. Below the navigation is a user profile for Jill Smith, showing 0 messages and a 'Key Contact' status. The main content area displays the requisition information, including the position title, current status ('Key Contact to Post'), position type ('Full-Time Faculty'), department ('Chemical Engineering - 123000'), and created by ('Jill Smith'). To the right of the requisition details is a sidebar with a 'Take Action On Requisition ▾' button, which is highlighted with a yellow arrow. Below this button are links for 'See how Requisition looks to Applicant', 'Print Preview (Applicant View)', and 'Print Preview'. At the bottom of the page, there are navigation links for Summary, History, Settings, Applicants, Reports, Hiring Proposals, and Associated Position.

5. Take Action on Requisition: **Select Post.**

Take Action On Requisition ▾

WORKFLOW ACTIONS

Keep working on this Requisition
Approve for Later Posting (move to Approved-For Later Posting)
Approved for Internal Only (move to Approved - Internal)
Post (move to Posted)
Cancel Posting (move to Canceled)

The **Take Action** selection will move this Requisition to one of the Posting options:

- **Keep working on this Action:** The saves the form and allows you to go back in later and continue working on it before taking action.
- **Approve for Later Posting:** The Req will automatically be posted on the date you specify.
- **Approve for Internal Only:** This will not be posted on the NEU website. A posting Waiver is required.
- **Post:** This results in the Req being posted immediately.
- **Cancel Posting:** The Posting will be cancelled, and it will not be able to be re-activated later.

6. The Take Action window appears next.

Take Action ×

Post (move to Posted)

Comments (optional)
Posted as of today
01/15/2012

This requisition is currently in your watch list. Uncheck this box to remove it.

Submit **Cancel**

The Take Action window:

- You can enter a **comment** which would appear in the transition email to HR/Employment. (Comments do not get stored in the Req or Posting).
- The checkbox for "**This requisition is currently in your watch list.**" is defaulted as checked. You can monitor the subsequent activity of this action using your Watch List.

7. The next page shows the results of your submission:

- Green bar with the 'success' message appears next (press the x icon to close the green bar). If this bar is red you will see an error message, typically indicative of a missed required field. You can go back in and edit the form and re-submit.
- Status now shows as **Posted** and Owner shows as **Key Contact**.

The screenshot shows a web browser window for the PeopleAdmin system. At the top, there is a green banner with the text "Requisition was successfully transitioned". Below the banner, the navigation menu includes "Home", "Requisitions" (which is selected), "Hiring Proposals", "My Profile", and "Help". The user information at the top right shows "Jill Smith, you have 0 messages." and "Key Contact" with a dropdown arrow. A "logout" link is also present. The main content area displays a requisition for a "Professor of Chemical Engineering (Full-Time Faculty)". The "Current Status" is listed as "Posted". Other details include "Position Type: Full-Time Faculty", "Department: Chemical Engineering - 123000", "Created by: Jill Smith", and "Owner: Key Contact". On the right side of the main content, there is a "Take Action On Requisition" button with a dropdown arrow. Below it are several workflow actions: "Keep working on this Requisition", "Close Posting (move to Closed)", "Reposted (move to Reposted)", "Extended Posting (move to Extended Posting)", "Canceled (move to Canceled)", and "Fill Posting (move to Filled)". To the right of the main content area, there is a sidebar with links: "See how Requisition looks to Applicant", "Print Preview (Applicant View)", and "Print Preview".

The Key Contact now is able to do the following Actions.

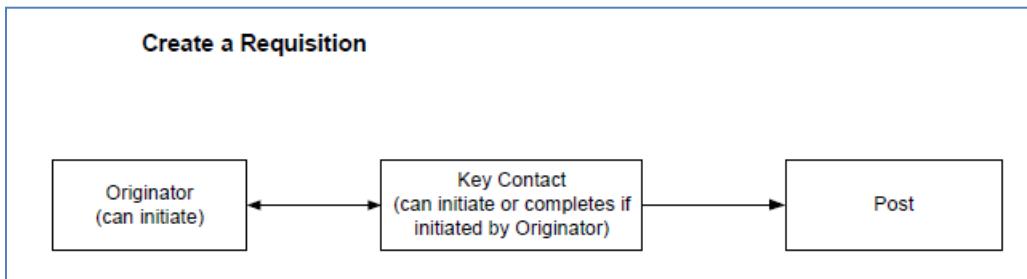
The screenshot shows a callout box pointing to the "Take Action On Requisition" dropdown menu. The menu contains several options under the heading "WORKFLOW ACTIONS": "Keep working on this Requisition", "Close Posting (move to Closed)", "Reposted (move to Reposted)", "Extended Posting (move to Extended Posting)", "Canceled (move to Canceled)", and "Fill Posting (move to Filled)". To the right of the callout box, a detailed explanation of the "Take Action" selection is provided:

The **Take Action** selection will move this Requisition to one of the Posting options:

- **Keep working on this Action:** The saves the form and allows you to go back in later and continue working on it before taking action.
- **Close Posting:** Remove the Posting
- **Reposted:** if a change was made to the Req, you will need to re-post to reflect the changes.
- **Extended Posting:** Use this option to extend beyond the Close date, or if you have made additional changes after you have used the 'Reposted' option.
- **Cancel Posting:** The Posting will be cancelled, and it will not be able to be re-activated later.
- **Fill Posting:** Remove from the web; the position has been filled.

Note: *None of these actions can be programmed to occur automatically. Therefore, to remove a posting from the web, once the hire has been processed, the Key Contact will need to select 'Fill Posting'.*

Part Time Faculty Requisitions



Create a Part-Time Faculty Requisition

Please refer to the section 'Faculty – Full-Time' for instructions on creating a Part-Time Requisition. The tasks are the same with the following exceptions:

- There is no Recruitment Plan
- The Workflow is simplified.

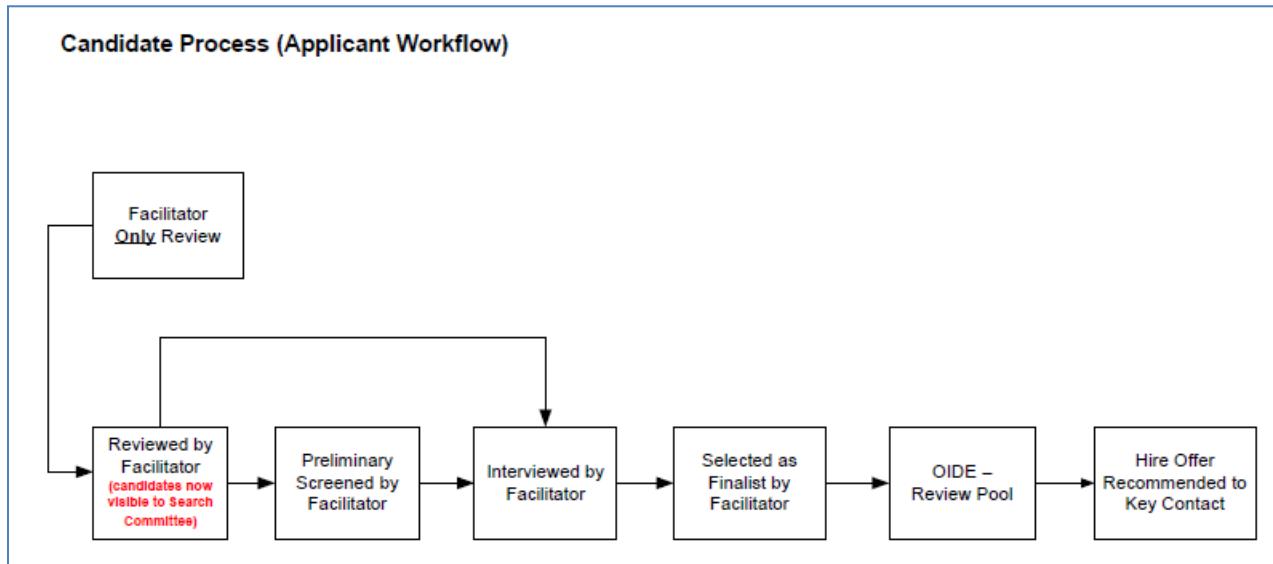
Review / Edit Part-Time Faculty Posting

Please refer to the section 'Faculty – Full-Time' for instructions on how to Review/Edit a Part-Time Posting. The tasks are the same with the following exceptions:

- The Workflow is simplified.

Managing Applicant Pools

Staff



Manage Staff Applicant Pool

Key Points:

- ✓ As a Key Contact, you are automatically a Facilitator even though you may not be specifically named as such on a Requisition.
- ✓ A Key Contact may also a member of a Search Committee
- ✓ Applicant Dispositions: Below are the 3 options available to a Facilitator, who can use any combination of the 3 as they see appropriate.
 - a. A Facilitator can move staff applicants along various workflow states (Facilitator Only Review > Reviewed by Facilitator > Screened > Interviewed, etc.). In doing so, Search Committee members and others can view and rank applicants.
 - b. A Facilitator can Reject staff applicants instead of moving them along in the Workflow.
 - c. A Facilitator can retain a number of applicants in the Facilitator Only Review state of moving them along in the Workflow, or, instead of rejecting them.

Steps to Manage Staff Applicants

1. Select the Applicant Tracking module
2. Change role to Facilitator
3. Go to Requisitions > Staff
4. Search for the Requisition
5. Click on Req # or title

The screenshot shows the PeopleAdmin interface for managing staff applicant pools. At the top, there's a navigation bar with links for Inbox, PeopleAdmin, Watch List, APPLICANT TRACKING (with a dropdown arrow), Logout, and a user profile for Jill Smith. The APPLICANT TRACKING dropdown has a yellow box around it, labeled '1'. Below the navigation is a secondary header with Home, Requisitions (which is highlighted with a yellow box, labeled '3'), My Profile, and Help. The main content area is titled 'Staff Requisitions' and features a 'Create New Requisition' button. A search bar at the top of the list has 'budget' typed into it, with a yellow box around it, labeled '4'. Below the search bar is an 'Ad hoc Search' section with a dropdown set to 'All Staff Requisitions' and a link to 'Save this search?'. The main table lists two requisitions. The first row for 'Senior Financial Analyst' has a yellow box around its 'Actions' column, labeled 'Actions'. The second row for 'Associate Director - Budget' has a yellow box around its 'Requisition Number' field, labeled '5'.

Requisition Number	Posting Title	Division/College (Posting)	Requisition Facilitator	Workflow State	Active Applications	Created Date	(Actions)
STFR000020	Senior Financial Analyst	Administration and Finance	Samuel Solomon, Jeffrey Wormuth	Approved - Internal	0	December 20, 2011 at 12:19 pm	Actions ▾
STFR000021	Associate Director - Budget	Administration and Finance	Samuel Solomon, Jeffrey Wormuth	Reposted	4	December 20, 2011 at 02:49 pm	Actions ▾

6. Go to the Applicants tab

The screenshot shows the 'Requisitions / Staff / Associate Director - Budget (Reposted) / Summary' page. At the top right, there are links for 'Search Results: Previous | Next'. Below the title, it says 'Requisition: Associate Director - Budget (Staff)' and 'Current Status: Reposted'. It lists 'Position Type: Staff', 'Department: Budget Office - 155200', 'Created by: Stephanie Scenna', and 'Owner: HR Employment'. A yellow box highlights the number '6' in a blue box at the bottom left of the page. Below the main content, there are three buttons: 'Summary' (disabled), 'Applicants' (highlighted with a yellow circle), 'Reports', and 'Hiring Proposals | Associated Position'.

7. **Reviewing Applicants:** On this page you have a number of options.

- A. Review one applicant at a time
- B. Review applicants 'in bulk'
- C. Review supplemental questions and answers
- D. Export search results

The screenshot shows the 'Requisitions / Staff / Associate Director - Budget (Reposted) / Applicant Review' page. At the top right, there are links for 'Search Results: Previous | Next'. Below the title, it says 'Requisition: Associate Director - Budget (Staff)' and 'Current Status: Reposted'. It lists 'Position Type: Staff', 'Department: Budget Office - 155200', 'Created by: Stephanie Scenna', and 'Owner: HR Employment'. Below the main content, there are three buttons: 'Summary' (disabled), 'Applicants' (highlighted with a yellow circle), 'Reports', and 'Hiring Proposals | Associated Position'. A search bar with 'Open Saved Search ▾', 'Search:', 'Search', and 'More search options' is present. A 'Staff Applications' modal window is open, showing a saved search titled 'Saved Search: "Staff Applications" (4 Items Found)'. The table has columns: 'Full Name', 'Requisition Number', 'Application Date', 'Workflow State (Internal)', 'Status', 'Application Form', and '(Actions)'. The 'Workflow State (Internal)' and 'Application Form' columns are highlighted with yellow circles. The table data is as follows:

Full Name	Requisition Number	Application Date	Workflow State (Internal)	Status	Application Form	(Actions)
Mace, Elizabeth	STFR000021	December 29, 2011 at 01:57 pm	Facilitator Only Review	Facilitator Only Review	External Application	Actions
Smith, Jill	STFR000021	December 29, 2011 at 01:59 pm	Facilitator Only Review	Facilitator Only Review	External Application	Actions
Caruso, Sonia	STFR000021	December 29, 2011 at 02:00 pm	Facilitator Only Review	Facilitator Only Review	External Application	Actions
Ribeiro, Amanda	STFR000021	December 29, 2011 at 02:03 pm	Facilitator Only Review	Facilitator Only Review	Current Employee Application (Internal Use Only)	Actions

Search Results:

- **Workflow State Column:** As a reminder, at this state, applicants are only visible to the Facilitator, and not the Search Committee. Applicants will need to be moved to 'Reviewed by Facilitator' in order to be visible to the Search Committee. Any Internal candidates should be contacted regarding their candidacy.
 - **Application Form Column:** Designates the External vs. Current Employee application type.
- Please see **Appendix A** for instructions on using Search in PeopleAdmin.

A. To review one applicant at a time:

- Click on the applicant's name, or on the Actions button (in the applicant's row) and select View.

Full Name	Requisition Number	Application Date	Workflow State (Internal)	Workflow State Owner	Status	Active/Inactive	(Actions)
Thomas, Tim	STFR000021	January 02, 2012 at 12:32 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions
Ortiz, David	STFR000021	January 02, 2012 at 12:37 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions
Pierce, Paul	STFR000021	January 02, 2012 at 12:47 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions
Brady, Tom	STFR000021	January 02, 2012 at 12:50 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions

At the **top** of the application, you can do the following things:

1. Scroll through the application
2. Take an action on this applicant
3. Go back to the listing of applicants
4. Go to the next applicant in the listing

Job application: Tim Thomas (Staff)
Current Status: Facilitator Only Review
Application form: External Application

Full name: Tim Thomas
Address:
10 Main Street
Arlington , MA
Username: tim123
Email: tim@zed.zed
Phone (Primary): (508) 555-4545
Phone (Secondary):
Position Type: Staff
Department: Budget Office - 155200

Created by: Tim Thomas
Owner: Facilitator

Take Action On Job Application ▾

WORKFLOW ACTIONS

Keep working on this Job application
Candidate Reviewed (move to Reviewed by Facilitator)
Reject Candidate (move to Rejected by Facilitator)

Requisitions / ... / Associate Director - Budget (Posted) [Applicant Review](#) > Tim Thomas Facilitator Only Review

Search Results: [Next](#)

At the **bottom** of the application are 3 links:

1. Link to the PDF resume
2. Link to download a PDF of the Application
3. Link to download a PDF of the Application and the attached documents (ie., Resume)

Document Type	Name	Conversion Status
Resume	1 Resume 11-26-11 19:22:13 (9.1 KB)	PDF complete

Optional Documents

No optional documents added.

PDF Documents

Document Type
Application
Application and attached documents

B. To Review applicants 'in bulk'

Return to your Applicants.

1. Select all applicants
2. Click on Actions > Download Applications as PDF's
3. Select the documents
4. Press Submit

The screenshot shows the 'Staff Applications' screen with a saved search titled 'Saved Search: "Staff Applications" (4 Items Found)'. A context menu is open at the top right, with the option 'Download Applications as PDF's' highlighted. Below the menu, a modal dialog box is displayed with the heading 'Select the document type(s) to use.' It contains two radio button options: 'Application and All Documents' (selected) and 'Only These Document Types'. Under 'Only These Document Types', there are two checkboxes: 'Application Data' (unchecked) and 'Resume' (unchecked). At the bottom of the dialog are 'Submit' and 'Cancel' buttons, with the 'Submit' button highlighted.

C. To Review Supplemental Questions

Return to your Applicants.

1. Select all applicants
2. Click on Actions > Review Supplemental Questions

D. To Export Results (provides an excel spreadsheet of the applicants.)

Return to your Applicants.

1. Select all applicants
2. Click on Actions > Export Results.

8. Take Action on Applicants: On this page you have a number of options.

- A. Take action on one applicant (reject). Two methods.
- B. Take action on applicants 'in bulk'.

Requisition: Associate Director - Budget (Staff)
Current Status: Posted
Position Type: Staff
Department: Budget Office - 155200
Created by: Stephanie Scenna
Owner: HR Employment

Summary | History | **Applicants** | Reports |

Open Saved Search ▾ | Search: [] | Search | More search options

Staff Applications

Saved Search: "Staff Applications" (4 Items Found)

Full Name	Requisition Number	Application Date	Workflow State (Internal)	Workflow State Owner	Status	Active/Inactive	(Actions)
Thomas, Tim	STFR000021	January 02, 2012 at 12:32 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions
Ortiz, David	STFR000021	January 02, 2012 at 12:37 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions
Pierce, Paul	STFR000021	January 02, 2012 at 12:47 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions
Brady, Tom	STFR000021	January 02, 2012 at 12:50 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions

A. Take Action on one applicant (Reject).

1. Click on the applicant's name or select the Actions link in the row of the applicant, select View Application
2. In the Applicant view, select Take Action On Job Application, select Reject Candidate.
3. Select a Reason and press Submit

Staff Applications

Saved Search: "Staff Applications" (4 Items Found)

Full Name	Requisition Number	Application Date	Workflow State (Internal)	Workflow State Owner	Status	Active/Inactive	(Actions)
Thomas, Tim	STFR000021	January 02, 2012 at 12:32 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions
Ortiz, David	STFR000021	January 02, 2012 at 12:37 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions
Pierce, Paul	STFR000021	January 02, 2012 at 12:47 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions
Brady, Tom	STFR000021	January 02, 2012 at 12:50 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions

Requisitions / ... / Associate Director - Budget (Posted) / Applicant Review / David Ortiz Facilitator Only Review

Job application: David Ortiz (Staff)
Current Status: Facilitator Only Review
Application form: External Application

Full name: David Ortiz
Address:
12 Oak Street
Brookline , MA
Username: david123
Email: david@zed.zed
Phone (Primary): (617) 555-8989
Phone (Secondary):
Position Type: Staff
Department: Budget Office - 155200

Created by: David Ortiz
Owner: Facilitator

Take Action On Job Application ▾

WORKFLOW ACTIONS
Keep working on this Job application
Candidate Reviewed (move to Reviewed by Facilitator)
Reject Candidate (move to Rejected by Facilitator)

Take Action

Reject Candidate (move to Rejected by Facilitator)

Reason (please select)

Not Qualified
Not Qualified
Incomplete Application
Other

Submit | Cancel

B. Take Action on all Applicants

1. Select all applicants
2. Select Actions > Move in Workflow
3. Select a Workflow state (Reviewed by Facilitator)
4. Press Save Changes

1 Saved Search: "Staff Applications" (4 Items Found)

Full Name	Requisition Number	Application Date	Workflow State (Internal)	Workflow State Owner	Status
Thomas, Tim	STFR000021	January 02, 2012 at 12:32 pm	Facilitator Only Review	Facilitator	Facilitator Only Review
Ortiz, David	STFR000021	January 02, 2012 at 12:37 pm	Facilitator Only Review	Facilitator	Facilitator Only Review
Pierce, Paul	STFR000021	January 02, 2012 at 12:47 pm	Facilitator Only Review	Facilitator	Facilitator Only Review
Brady, Tom	STFR000021	January 02, 2012 at 12:50 pm	Facilitator Only Review	Facilitator	Facilitator Only Review

2

3

4

A message will appear in the green bar at the top of the page, and the Status of the applicants will be updated.

Search Committee will now have the ability to view these applicants.

The Facilitator will now have the ability to select **two more Workflow steps** for Applicants:

- **Preliminary Screened** by Facilitator (optional)
- **Interviewed** by Facilitator (required)
 - Once Interviewed is selected, the Facilitator can select **Finalist** – and then it's ready to go to OIDE. **Afterwards, the Facilitator will not be able to take any Actions on these applicants.**

How to Rank an Applicant (Search Committee Members)

Steps to Rank Applicants (Search Committee Members)

If Ranking Criteria has been selected by the Facilitator for a Requisition, and if the Requisition is in the correct Workflow State, you will be able to enter rankings.

1. Navigate to the Requisition and select the Applicants tab.
2. Select all applicants
3. Click on the Actions button and choose Evaluate Applicants.

Summary | History | **Applicants** | Reports |

1

Open Saved Search ▾ Search: Search More search options

Staff Applications

2

Saved Search: "Staff Applications" (4 Items Found)

Full Name	Posting Number	Application Date	Workflow State (Internal)	Workflow State Owner	Status	Actions
Thomas, Tim	STFR000021	January 02, 2012 at 12:32 pm	Reviewed by Facilitator	Facilitator	Reviewed by Facilitator	Evaluate Applicants
Ortiz, David	STFR000021	January 02, 2012 at 12:37 pm	Reviewed by Facilitator	Facilitator	Reviewed by Facilitator	Download Applicants Evaluations
Brady, Tom	STFR000021	January 02, 2012 at 12:50 pm	Reviewed by Facilitator	Facilitator	Reviewed by Facilitator	Review Supplemental Question Answers
McDonald, Mary	STFR000021	January 05, 2012 at 12:15 pm	Reviewed by Facilitator	Facilitator	Reviewed by Facilitator	Export results

GENERAL

Evaluate Applicants →
Download Applicants Evaluations
Review Supplemental Question Answers
Export results

BULK

Download Applications as PDFs

4. Click on the name to review the application again, if necessary. This will open a new tab in your browser. Close the tab to return to this page and continue on to step 5.
5. Enter a ranking and a comment. Scroll to all applicants on the page to enter rankings.
6. Press Save
7. To navigate back to the previous page press Applicant Review on the path, press Next, or your browser's back button.

Requisitions / ... / Associate Director - Budget (Extended Posting) ▶ Applicant Review ▶ Enter Evaluative Criteria Evaluations

7

Workflow State: Reviewed By Facilitator

Showing 4 Applicants. Show More

Evaluations

7

6

4

5

Applicant Name

Tim Thomas

Applicant ranking: How would you rank this applicant?

Yes

Comments

Mr. Thomas's experience is mostly relevant.

How to View Applicant Evaluations (Search Committee Chair)

Steps to View Applicant Evaluations (Search Committee Chair)

If Ranking Criteria has been selected by the Facilitator for a Requisition, and if the Requisition is in the correct Workflow State, the **Search Committee Chair** will be able to enter and view rankings.

1. Navigate to the Requisition and select the Applicants tab.
2. Select all applicants
3. Click on the Actions button and choose Evaluate Applicants.

The screenshot shows the 'Applicants' tab selected. A search bar at the top includes 'Open Saved Search', 'Search', and 'More search options'. Below is a table titled 'Staff Applications' with a 'Saved Search: "Staff Applications" (4 Items Found)' message. The table columns are: Full Name, Posting Number, Application Date, Workflow State (Internal), Workflow State Owner, and Status. The 'Full Name' column is highlighted with a yellow box labeled '2'. The 'Status' column is highlighted with a yellow box labeled '3'. A context menu is open over the last row, listing options like 'Evaluate Applicants' (which is highlighted with a yellow arrow), 'Download Applicants Evaluations', 'Review Supplemental Question Answers', 'Export results', and 'BULK Download Applications as PDFs'.

4. Click on View Detailed Entries

The screenshot shows the 'View Detailed Entries' page. The sidebar has 'Evalutive Criteria' and 'Reviewed by Facilitator' sections, with 'View Detailed Entries' highlighted with a yellow box labeled '4'. The main content area shows 'Workflow State: Reviewed By Facilitator' and a table with 4 applicants: Thomas, Ortiz, Brady, and McDonald, each with a 'Show More' link.

5. Select a name

The screenshot shows the 'Evalutive Criteria Score Details' page. It displays a table of applicants with their names, current state, and overall status. The first row, 'Tim Thomas', is highlighted with a yellow box labeled '5'.

6. View evaluations that have been entered to date.
7. To navigate back to the Applicant page, press Evaluate Applicants in the navigation path or your browser's back button.

Requisitions / ... / Evaluate Applicants > Tim Thomas / Evaluative Criteria Details

7

Evaluative Criteria Details and Overrides

* Required Information

Workflow State: Reviewed By Facilitator

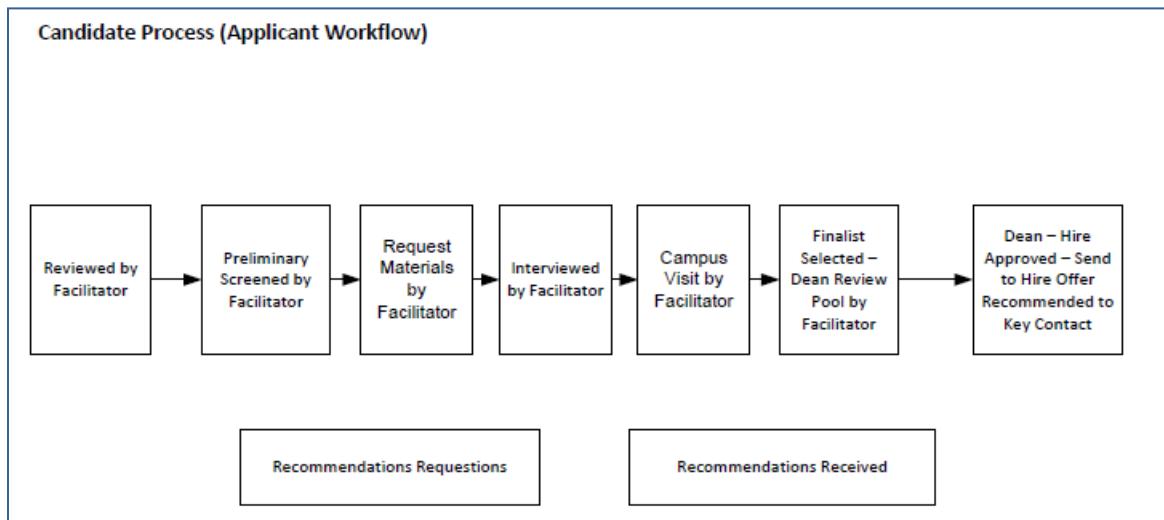
Reviewer Name	Applicant ranking (weight:)	Comments
Elizabeth Mace	Yes(points)	N/A
Jill Smith	Yes(points)	Mr. Thomas's experience is mostly relevant.
Average Score	0.00 points	
Total		N/A

Faculty

Manage Faculty Candidates

Please refer to the instructions for Staff Applicants. The tasks are the same, with the following exceptions:

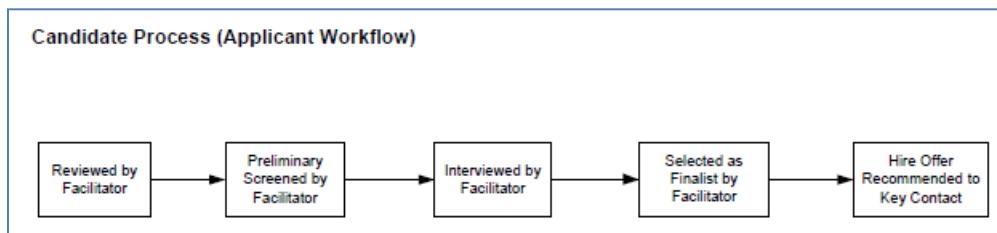
- The Search Committee has immediate view to all candidates.
- The Facilitator will have the ability to select from multiple workflow states for Faculty Candidates.
- The Dean will select the workflow state of ‘Hire Offer Recommended – to Key Contact’ before the Hiring process can begin.
- The Key Contact will then have the ability to begin a Hiring Proposal.



Manage Part-Time Faculty Candidates

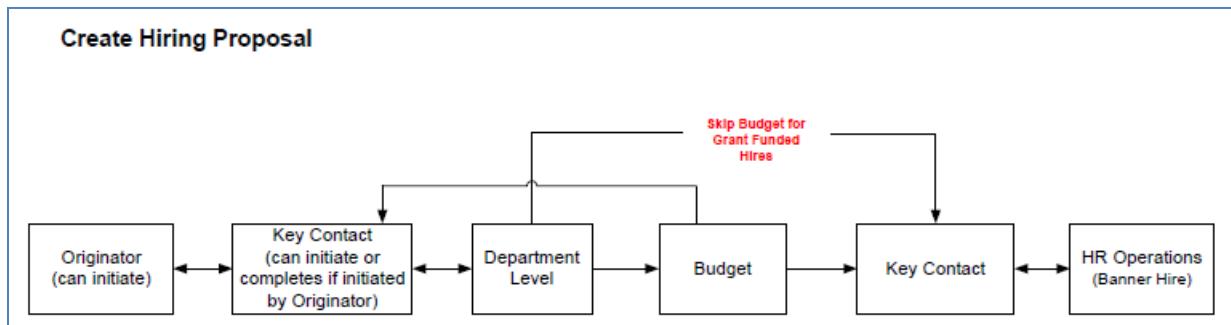
Please refer to the instructions for Staff Applicants. The tasks are the same with the following exception:

- The workflow is simplified
- The workflow does not include OIDE



Hiring Employees

Staff



Initiating a Staff Hiring Proposal

This process can begin when OIDE has reviewed the EEO reports, the applicants, and has forwarded the selected finalist in the Workflow, to the Key Contact.

Steps to Initiate a Staff Hiring Proposal

1. Go to your inbox
2. Navigate to the requisition
3. Click on applicants
4. Select name
5. Start hiring proposal

The screenshot shows the PeopleAdmin application interface. At the top, there is a navigation bar with links for Home, Requisitions, Hiring Proposals, My Profile, and Help. A user profile for Jill Smith is shown, indicating 6 messages, with options to set her as Key Contact or logout. Below the navigation, the URL is Requisitions / Staff / Sr. Academic Coordinator (Posted) / Applicant Review.

The main content area displays a requisition titled "Requisition: Sr. Academic Coordinator (Staff)" with a current status of "Posted". It shows details about the position: Position Type: Staff, Department: CAS Undergraduate Operations - 128400, Created by: Jill Smith, and Owner: HR Employment.

On the right side of the requisition details, there are three links: "See how Requisition looks to Applicant", "Print Preview (Applicant View)", and "Print Preview".

Below the requisition details, there is a navigation bar with links for Summary, History, Applicants (which is selected), Reports, Hiring Proposals, and Associated Position.

Under the Applicants tab, there is a search bar with "Open Saved Search" and "Search" buttons, and a link for "More search options".

Below the search bar, there are two buttons: "All Staff Applications" and "Applicant Search".

The "Applicant Search" section shows a saved search titled "Applicant Search" (1 Item Found). The results table has columns for First Name, Last Name, Requisition Number, Status, and Actions. One row is visible, showing Regina King, Requisition Number 2011046P, Status "Hire Offer Recommended to Key Contact", and an Actions button. The number "5" is highlighted with a yellow box in the First Name column.

6. Click 'Start Hiring Proposal'

Job application: Regina King (Staff)
Current Status: Hire Offer Recommended to Key Contact
Application form: Staff Application

Full name: Regina King
Address:
140 Main St.
Boston , MA

Created by: Regina King
Owner: Key Contact

Take Action On Job Application ▾
★ View Requisition Applied To
★ Preview Application
6 Start Hiring Proposal

7. A Positions listing appears next; the Position to which the Req was originally attached, is selected. You may review Position information by clicking on the Position #, and you can select another Position for this Hiring Proposal.

➤ *Note: The Position selected in this step will be attached to the applicant's new hire record in Banner.*

Selected Position
• Sr. Academic Coordinator

Positions

Open Saved Search ▾ Search: [] Search More search options

Ad hoc Search Staff Positions

Ad hoc Search

« Previous 1 2 3 4 5 6 7 8 9 ... 98 99 Next »

Position Number	Position Title	Department/College	Status	(Actions)
502510	Program Manager-Pharm Ex Ed.	Pharmacy OEE - 116600	Active	Actions ▾
503635 7	Sr. Academic Coordinator	CAS Undergraduate Operations - 128400	Active	Actions ▾

8. After Selecting the Position, scroll to the bottom of the page and click **Select Position**

9. Complete the Hiring Proposal Form:

Hiring Proposal Form	
Field	Notation about the Field
Document Information section	
Hiring Proposal Number	Auto-assigned at the start of the Hiring Proposal
Requisition Number	Auto-assigned when the Req was created.
Applicant Confirmation Number	Auto-assigned when the Applicant submitted their application.
Candidate Information section (PPAIDEN)	
These fields will be fed to the PPAIDEN form in Banner as the new hire record.	
Prefix First Name Middle Name Last Name Suffix	Fields previously completed by the Applicant
Address1 Address2 City State Postal Code Nation	
Phone Type Phone	
Gender Are you Hispanic or Latino(a)? Race	
Military Status	
Email Address	
Employee Information section (PEAEMPL)	
These fields will be fed to the PEAEMPL form in Banner as the new hire record.	
Employee Class	Populated from the Position
Hire Date	Key Contact must enter a Hire Date here.
Campus Address	Enter this information is available.
Campus Phone	
Mail Drop	
Job Information section (NBAJOBS)	
These fields will be fed to the NBAJOBS form in Banner as the new hire record.	
Position Title	Populated from the Position
Position Number	
Annual Salary	Key Contact must enter a value here.
Hourly Rate	Key Contact must enter a value here.

Min Expected Hiring Range	Populated from the Requisition
Max Expected Hiring Range	
Shift	Key Contact must enter a value here.
Hours per day	Populated from the Requisition
Contract Start Date	Optional
Contract End Date	
Grant Funded End Date	
Appointment End Date	
Standard Hours	Enter the weekly standard hours (ie., 40, 35, 24, etc)
Additional Funding Information section	
This section is utilized when:	
A. If there is an additional payment such as a signing or relocation bonus (you must designate the funding), and/or,	
B. If the base salary is going to be funded from a source that is different from the source designated in the approved Position.	
Index Lookup	Links you to the NEU Banner Finance web site
Add Additional Funding Information Entry	
Component	Select Hourly Salary, Annual Rate, Relocation Bonus, Signing Bonus, Other
Amount	Enter a dollar amount
Frequency of Funding	Annual, Hourly, One-time
Index	Enter the index #
Account	Select from drop down
Percent	If percent is less than 100%, please press the Entry button again to submit additional entries until all entries sum up to 100%. This will not be validated by the system, please take care to ensure the total is 100%.
Offer Letter Information section	
Return Letter By	Optional. Offer letters will be done manually; there is no functionality set up currently for offer letter creation within PA.
Questions Contact	
Verifying Requirements section (all are required fields)	
If this position has an education requirement, has the candidate's degree(s) been verified	Yes or No
Degree Verified By	Name the staff member who verified the applicant's Degree
Date of Degree Verification	Date that the above named staff member verified the Degree
Has the candidate's last seven years of employment history been confirmed?	Yes or No
Employment Verified By	Name the staff member who verified the applicant's Employment
Date of Employment Verification	Date that the above named staff member verified the Employment
Have at least 2 professional references been completed on the candidate?	Yes or No
References check by	Name the staff member who checked the applicant's references.
Date of Reference Check	Date that the above named staff member checked the applicant's references.
Additional Comments section	
Comments	Text box

10. Take Action on Hiring Proposal: Select Department Approver.

➤ Note: the Department Approver will be able to skip Budget in the Workflow for all Grant-funded hires.



Transition Staff New Hire to HR

When all approvals have been completed, the Key Contact will need to take the final step in the workflow.

Steps to Transition New Hire to HR

1. Select the Applicant Tracking module
2. Change role to Key Contact
3. Go to Hiring Proposals > Staff
4. Locate the Applicant, note that the Status is 'Key Contact Authorized to Make an Offer' and click on the name.

The screenshot shows the 'Staff Hiring Proposals' page. At the top, there are tabs for Home, Requisitions, and Hiring Proposals (which is selected). Below the tabs, there are links for Staff, Full-Time Faculty, and Part-Time Faculty. On the right side, there is a sidebar with 'Inbox' (1 message), 'PeopleAdmin', 'Watch List', and 'APPLICANT TRACKING' (1). The main area displays a search bar and a table of hiring proposals. The table columns are First Name, Last Name, Requisition Number, and Status. The first row, for 'Regina King', has its status circled in yellow and labeled '5'. Other rows show 'Elizabeth Mace' with 'Budget' status and 'Betty Rodriguez' with 'Draft' status.

5. Click **Take Action on Hiring Proposal** to move it through the Workflow:
 - Keep working on this Hiring Proposal: You intend to come back to this.
 - **Send to HR Operations:** Move it 'forward' in the workflow.
 - Candidate Declined Offer: Select this in the event the offer was made, and it was declined.

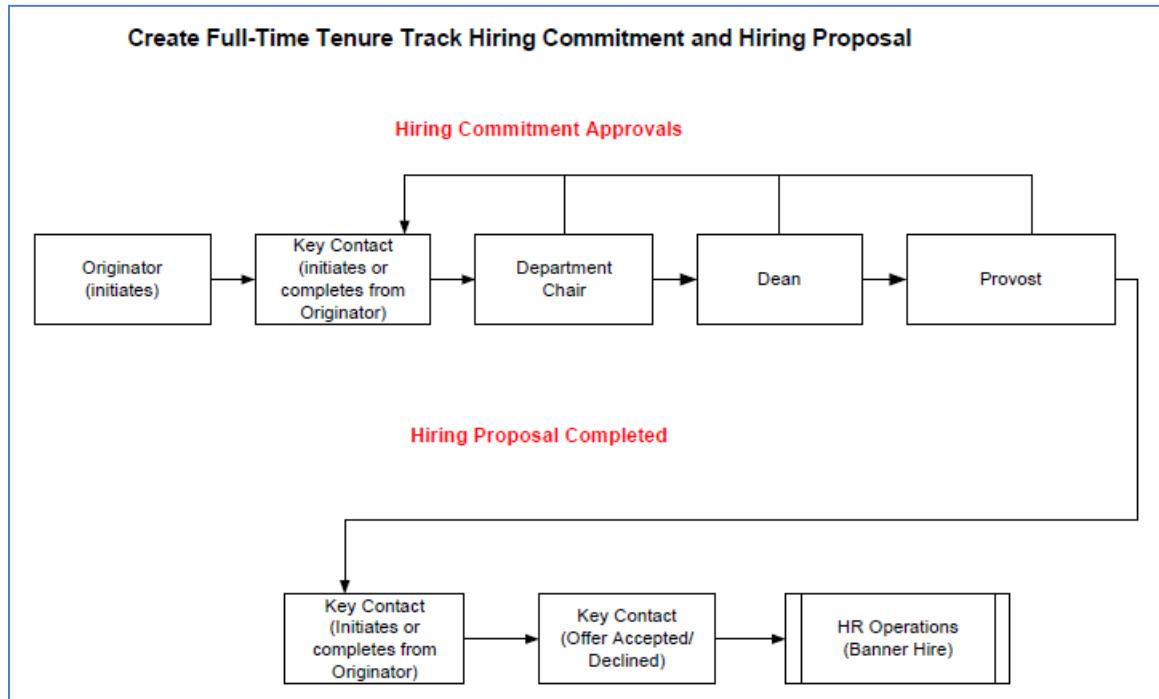
The screenshot shows the 'Hiring Proposal: Regina King (Staff)' page. The proposal details include: Position Type: Staff, Department: CAS Undergraduate Operations - 128400, Applicant: Regina King, Requisition: Sr. Academic Coordinator. To the right, a 'Take Action On Hiring Proposal' dropdown menu is open, showing options: Keep working on this Hiring Proposal, Send to HR Operations (move to HR Operations) (which is highlighted in blue), and Candidate Declined Offer (move to Offer Declined). A yellow box labeled '5' points to the 'Send to HR Operations' option. Below the dropdown, a 'Take Action' dialog box is open, containing a text area with 'Send to HR Operations (move to HR Operations)', a comments field with 'Thank you!', and a checkbox labeled 'Add this hiring proposal to your watch list?'. A yellow box labeled '6' points to the checkbox. A curved arrow points from the 'Send to HR Operations' option in the dropdown to the corresponding button in the dialog box.

6. HR Operations will then move the Hiring Proposal to the Status of ‘Hire Approved – Position Updated’ once the hire packet has been received.
7. HR Employment will then move the Requisition to ‘Filled’ (not ‘Closed’) in order to remove the posting from the web site.

Faculty

Full Time Tenure Track Hiring Commitment and Hiring Proposal

This process can begin when the Dean has approved the pool, and has forwarded the finalist ("Hire offer recommended to Key Contact").



Steps to Initiate a Faculty Tenure Track Hire

1. Select the Applicant Tracking module
2. Change role to Key Contact
3. Go to Requisitions > Full-Time Faculty
4. Click on the title of the Requisition

Full-Time Faculty Requisitions

Requisition Number	Posting Title	Division/Collge (Posting)	Requisition Facilitator	Workflow State	Active Applications	(Actions)
2011034FP	Associate Professor	College of Arts, Media and Design	Jill Smith	Posted	4	Actions
2011035FP	Test_Distinguished Prof & Chair	Bouve College of Health Sciences	Jill Smith	Posted	1	Actions
2011036FP	Professor of Chemical Engineering	College of Engineering	Jill Smith	Posted	2	Actions

5. Click on the applicant tab
6. Select the applicant in the Workflow State of 'Hire Offer Recommended' by clicking on the name.

Requisition: Professor of Chemical Engineering (Full-Time Faculty)

Current Status: Posted

Position Type: Full-Time Faculty
Department: Chemical Engineering - 123000

Created by: Jill Smith
Owner: Key Contact

Applicants

First Name	Last Name	Requisition Number	Application Date	Workflow State (Internal)	(Actions)
Albert	Einstein	2011036FP	November 27, 2011 at 03:42 pm	Preliminary Screened by Facilitator	Actions
Marie	Curie	2011036FP	November 27, 2011 at 04:26 pm	Hire Offer Recommended to Key Contact	Actions

7. Click 'Start Tenure Track Hiring Proposal'

Job application: Marie Curie (Full-Time Faculty)
 Current Status: Hire Offer Recommended to Key Contact
 Application form: Faculty Application

Full name: Marie Curie Address: 140 Main St. Boston , MA	Created by: Marie Curie Owner: Key Contact	7
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Take Action On Job Application ▾
 ★ View Requisition Applied To
 ★ Preview Application
 + Start Non-Tenure Track Hiring Proposal
 + Start Tenure Track Hiring Proposal

8. A Positions listing appears next; the Position to which the Req was originally attached, is selected. You may review Position information by clicking on the Position #, and you can select another Position for this Hiring Proposal. If you created a Req 'from scratch' (from Position Type) you will need to create the position in order to select it for the hire.

➤ *Note: The Position selected in this step will be attached to the applicant's new hire record in Banner.*

Home Requisitions Hiring Proposals | My Profile Help

Jill Smith, you have 6 messages. Key Contact logo

Requisitions / ... / Applicant Review / Marie Curie (Hire Offer Recommended to Key Contact) / New Hiring Proposal

Selected Position

- Professor

Positions

Open Saved Search ▾ Search: Search More search options

Faculty Positions

Saved Search: "Faculty Positions" (1537 Items Found)

« Previous 1 2 3 4 5 6 7 8 9 ... 51 52 Next »

Position Title	Position Number	Department	(Actions)
Distinguished Prof & Chair	500836	Pharmaceutical Sciences - 116300	Actions ▾
Professors	500000	Finance Group - 119600	Actions ▾
Professor	500001	Counseling and Applied Psychology - 117000	Actions ▾
8	500004	Chemical Engineering - 123000	Actions ▾

9. After Selecting the Position, scroll to the bottom of the page and click

Select Position

After the Position is selected, the Hiring Proposal Forms appear next:

- Hiring Commitment
- Joint Appointment
- Supporting Documents

Hiring Commitment Form	
Field	Notation about the Field
Hiring Commitment Information section	
First Name	From Application
Last Name	
Academic Year Base Salary	Annually (Include fringe)
Contract Base (# of Semesters/Quarters)	Number of semesters this employee will be paid.
Title of Position	Defaulted from Requisition
Start Date	
Immigration Status	US Citizen, Permanent Resident, Foreign National
Tenure Track	Yes or No
If yes, Year of Tenure Consideration	
Tenure on Entry	Tenure/Tenure Track or Non Tenure Track
Lateral Entry Credit	Give number of years and year of consideration
Department Vote	
Salary Obligations section	
Specify the amount and percentage of Academic year salary and source of funds. Include the current fringe rate in summer salary and stipends.	
Provost Funded %	
Provost Funded Amount	
Length of Provost Funding	
Primary College/School %	
Primary College/School Amount	
Primary College/School Source of Funds (enter College/School name)	
Secondary College/School %	
Secondary College/School Amount	
Secondary College/School Source of Funds (enter College/School name)	
Type of Hire	New, Reallocated, Replacement
If Replacement, enter name	
Budget Position number	
Additional Expense Categories	
Add Additional Expense Categories Entry	

Type	Capital Equipment, Relocation expense, Stipends, Summer Salary, Other Non-Capital Startup, Other
Amount	
Amount per Fiscal Year	Specify amount and Fiscal Year
Source of Funds	
Type of Term	
Comments	Please specify details as necessary.
Office Space and/or Renovations section	
Building	
Room / Lab Location Number	
Specify Details	
New Space or Renovations	New Space, or Renovations Needed
Source of Funds	
Estimated Total Cost	
Additional Comments	
Department Chair Approval	

Joint Appointment Form:

Joint Appointment Form	
Field	Notation about the Field
Primary College & Department (Locus of Tenure)	
Name of College & Department	
Specify teaching load percentage (at least 50% or # of courses/units)	
Courses / Units Per Year	
Other Responsibilities	
Secondary College & Department	
Name of Secondary College & Department	
Specify teaching load percentage (at least 50% or # of courses/units)	
Courses / Units Per Year	
Other Responsibilities	
Will teaching be renegotiated each year?	Yes or No

Supporting Documents Page:

The screenshot shows a web-based application interface for managing hiring proposals. At the top, there's a navigation bar with links for Home, Requisitions, Hiring Proposals, My Profile, and Help. A user profile for "Jill Smith" is shown, indicating 0 messages and listing "Key Contact". Below the navigation is a breadcrumb trail: Actions / ... / Tenure Track Hiring Proposal / Professor / Edit.

The main content area is titled "Editing Hiring Proposal" and contains several tabs: "Hiring Commitment" (selected), "Joint Appointment", "Supporting Documents" (highlighted in blue), and "Hiring Proposal Summary".

The "Supporting Documents" tab leads to a table titled "Supporting Documents" with columns for Document Type, Name, Status, and Actions. The table lists four items: Cover Memo, Equipment List, Draft of Offer Letter, and Expense Summary (Excel). Each item has a "Actions" dropdown menu.

To Take Action on Hiring Commitment:

This screenshot shows a detailed view of a hiring proposal for "Marie Curie" (Full-Time Faculty). The proposal details include Position Type: Full-Time Faculty, Department: Chemical Engineering - 123000, and Current Status: Draft. It also lists Created by: Jill Smith, Owner: Jill Smith, Applicant: Marie Curie, and Requisition: Professor of Chemical Engineering.

A context menu titled "Take Action On Hiring Proposal" is open, showing options like "Keep working on this Hiring Proposal", "Cancel Hiring Proposal (move to Canceled)", and "Department Chair - Hiring Commitment (move to Department Chair - Hiring Commitment)". A yellow arrow points from this menu to a larger "Take Action" dialog box.

The "Take Action" dialog box has a title "Move directly to 'Department Chair - Hiring Commitment'". It includes a comments field with "Thank you." and a checkbox labeled "Add this hiring proposal to your watch list?". A yellow circle highlights the checkbox. Arrows point from the "Take Action" dialog back to the "Department Chair - Hiring Commitment" option in the context menu.

Creating a Tenure Track Hiring Proposal

This step occurs after the Provost has approved the Hiring Commitment and has sent it to the Key Contact.

Steps to Creating the Faculty Tenure Track Hiring Proposal

1. Select the Applicant Tracking module
2. Change role to Key Contact
3. Go to Hiring Proposals > Full-Time Faculty
4. Locate the Applicant, click on the name.

The screenshot shows the PeopleAdmin Applicant Tracking interface. At the top, there's a navigation bar with Home, Requisitions, Hiring Proposals (which is highlighted), My Profile, and Help. To the right of the navigation is an 'Inbox' button, a 'Watch List' button, and a dropdown for 'APPLICANT TRACKING' with a value '1'. Below the navigation is a sub-menu for 'Hiring Proposals' with options: Staff, Full-Time Faculty (which is selected and highlighted with a yellow box), and Part-Time Faculty. The main content area is titled 'Full-Time Faculty Hiring Proposals'. It includes a search bar with 'Search:' and a dropdown for 'More search options'. Below the search bar is an 'Ad hoc Search' section with a button to 'Save this search?'. A table lists four items found, with the first row highlighted (First Name: Marie, Last Name: Curie, Requisition Number: 2011036FP, Status: Key Contact). A yellow box labeled '4' is placed over the 'Actions' column for the first row.

5. Click **Edit** anywhere on this page to fill out the Hiring Proposal Form.

The screenshot shows the 'Tenure Track Hiring Proposal' form for Marie Curie. At the top, it displays the title 'Tenure Track Hiring Proposal: Marie Curie (Full-Time Faculty)' with an 'Edit' button (labeled '5') next to it. It also shows the current status as 'Key Contact'. Below this, it lists the position type as 'Full-Time Faculty', department as 'Chemical Engineering - 123000', applicant as 'Marie Curie', and requisition as 'Professor of Chemical Engineering'. On the right side, there are buttons for 'Take Action On Hiring Proposal' and 'Print Preview'. At the bottom, there are tabs for 'Summary' (which is selected), 'History', and 'Settings'. A link to 'Hiring Information' with an 'Edit' button (labeled '5') is located at the bottom left.

Hiring Proposal Form		
Field	Notation about the Field	
Document Information section		
Hiring Proposal Number	Auto-assigned at the start of the Hiring Proposal	
Requisition Number	Auto-assigned when the Req was created.	
Applicant Confirmation Number	Auto-assigned when the Applicant submitted their application.	
Candidate Information section (PPAIDEN)		
These fields will be fed to the PPAIDEN form in Banner as the new hire record.		
Prefix First Name Middle Name Last Name Suffix	Fields previously completed by the Applicant	
Address1 Address2 City State Postal Code Nation		
Phone Type Phone		
Gender Are you Hispanic or Latino(a)? Race		
Military Status		
Email Address		
Employee Information section (PEAEMPL)		
These fields will be fed to the PEAEMPL form in Banner as the new hire record.		
Employee Class	Populated from the Position	
Hire Date	Key Contact must enter a Hire Date here.	
Campus Phone	Enter if information is available.	
Campus Address		
Mail Drop		
Job Information section (NBAJOBS)		
These fields will be fed to the NBAJOBS form in Banner as the new hire record.		
Position Title Position Number	Populated from the Position	
Academic Year Base Salary	Key Contact must enter a value here.	
Contract Start Date Contract End Date	Optional	
Grant Funded End Date		
Appointment End Date		
Standard Hours	For a Full-Time Faculty member, the Standard Hours is typically 35.	
# of Pays	16, 20 or 24	
Base Period	Enter the number of the weeks for this appointment.	
Additional Funding Information section		
Index Lookup	Links you to the NEU Banner Finance web site	
Add Additional Funding Information Entry		
Component	Select Hourly Salary, Annual Rate, Relocation Bonus, Signing Bonus, Other	
Amount	Enter a dollar amount	
Frequency of Funding	Annual, Hourly, One-time	

Index	Enter the index #
Account	Select from drop down
Percent	If percent is less than 100%, please press the Entry button again to submit additional entries until all entries sum up to 100%. This will not be validated by the system, please take care to ensure the total is 100%.
Offer Letter Information section	
Return Letter By	Optional
Questions Contact	
Verifying Requirements section (all are required fields)	
If this position has an education requirement, has the candidate's degree(s) been verified	Yes or No
Degree Verified By	Name the staff member who verified the applicant's Degree
Date of Degree Verification	Date that the above named staff member verified the Degree
Has the candidate's last seven years of employment history been confirmed?	Yes or No
Employment Verified By	Name the staff member who verified the applicant's Employment
Date of Employment Verification	Date that the above named staff member verified the Employment
Have at least 2 professional references been completed on the candidate?	Yes or No
References check by	Name the staff member who checked the applicant's references.
Date of Reference Check	Date that the above named staff member checked the applicant's references.
Additional Comments section	
Comments	Text box
Department Chair Approver	

6. The approved Hiring Commitment Form, Joint Appointment and Supporting Documents pages appear next.
7. The Summary page appears next. Click on Take Action on Hiring Proposal, and select 'Offer Accepted – Send to HR Operations'.

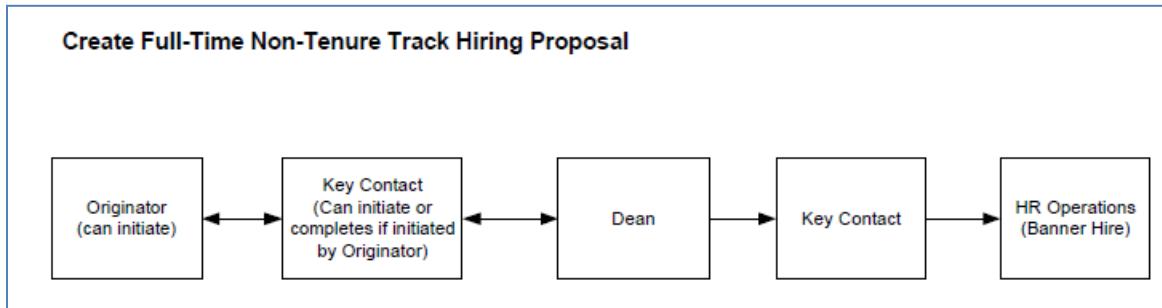
The screenshot shows a web-based application interface for managing hiring proposals. At the top, there is a navigation bar with links: 'Full-Time Faculty / ... / Elizabeth Mace (Hire Offer Recommended to Key Contact) / Tenure Track Hiring Proposal / Summary'. Below this, the main content area displays the 'Tenure Track Hiring Proposal: Elizabeth Mace' details. On the left, there is a document icon and the title 'Tenure Track Hiring Proposal: Elizabeth Mace'. Below the title, it says '(Full-Time Faculty)' and has an 'Edit' link. It also shows the 'Current Status: Key Contact'. To the right of this, there is a 'Take Action On Hiring Proposal ▾' dropdown menu. This menu contains three items: 'Keep working on this Hiring Proposal', 'Offer Accepted - Send to HR Operations (move to HR Operations)', and 'Offer Declined by Candidate (move to Offer Declined)'. The 'Offer Accepted - Send to HR Operations' option is highlighted with a grey background.

8. HR Operations will then move the Hiring Proposal to the Status of 'Hire Approved – Position Updated' once the hire packet has been received.
9. The Key Contact will then move the Requisition to 'Filled' (not 'Closed') in order to remove the posting from the web site.

Full-Time and Part Time (Non Tenure Track) Faculty Hiring Proposals

Please see the instructions for the Tenure Track Hiring Proposals. The tasks are the same with the following exceptions:

- There is no Hiring Commitment Process
- The workflow is simplified



Appendices

A. The Search Tool in PeopleAdmin

Default search results (all results) appear on your Positions, Requisitions, Applicants, Applicants, Hiring Proposals, etc. To make it easier for you to navigate these results, you can change the way the results appear by Formatting Search Results, and then saving the format to use again.

Formatting Search Results

Add a column to the Search results

1. Click the More search options link
2. Click the drop down on the Add Column field
3. Select the column

The screenshot shows the PeopleAdmin interface with three main windows illustrating the steps to add a column to search results:

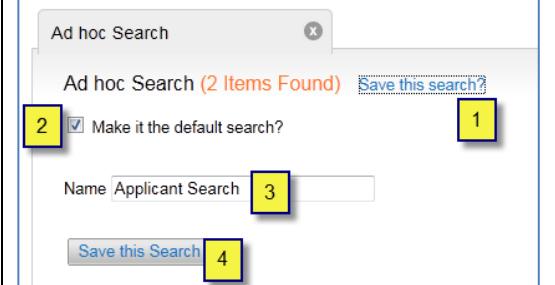
- Top Window:** Shows the search bar and "More search options" link (step 1). Below is a list of "All Staff Applications" with columns: First Name, Last Name, Posting Number, Application Date, Workflow State (Internal), Status, and Actions. A yellow box labeled "1" highlights the "More search options" link.
- Middle Window:** Shows the "Requisition: Sr. Academic Coordinator" details. A yellow box labeled "3" highlights the "Employer" field under "Requisition Details". Below is a list of "All Staff Applications" with the same columns as the top window. A yellow box labeled "2" highlights the "Add Column" dropdown menu.
- Bottom Window:** Shows the search results after adding the "Employer" column. The "All Staff Applications" list now includes an additional column titled "Employer". A yellow box highlights the "Employer" column header. A yellow arrow points from the "Add Column" dropdown in the middle window to the "Employer" column in the bottom window.

First Name	Last Name	Posting Number	Application Date	Workflow State (Internal)	Status	(Actions)
Robert	Cornell	2011046P	November 26, 2011 at 08:23 pm	Facilitator Only Review	Facilitator Only Review	Actions
William	Draper	2011046P	November 26, 2011 at 08:25 pm	Facilitator Only Review	Facilitator Only Review	Actions
Regina	King	2011046P	November 26, 2011 at 08:26 pm	Facilitator Only Review	Facilitator Only Review	Actions

Working with columns in Search results

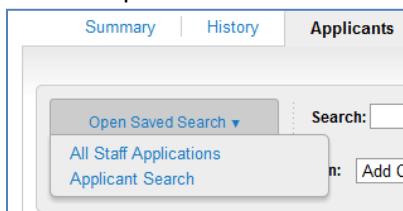
Move the column to the left or the right.	
Sort the results in ascending or descending order.	
Delete the column from the Search Results.	

Saving a Search Format, after making changes

<p>1. Click Save this search? 2. Check to make it your default search 3. Name the Search 4. Save</p>	
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Using a saved search:

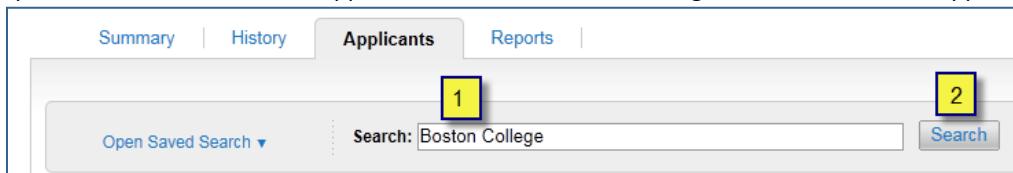
Click on Open Saved Search to access your saved, named searches.



Search for a record (Position, Requisition, Applicant, etc)

Entering a search term:

In this example we would like to find all Applicants who have 'Boston College' mentioned in their application.



B. Glossary of PeopleAdmin Terms

PeopleAdmin Term	Definition
Product Module	PeopleAdmin (PA) is arranged in two distinct Functional Areas: Applicant Tracking: Requisition and Applicant Processes Position Management: Position Information and Processes
Group or Role	PA is structured to process information based on the user's Group or Role. You must select your Group when you log in. You will only be able to select the group(s) that have been tied to your User Profile. Roles everyone will have: Employee, Search Committee, Facilitator. Other Roles are Key Contact, Divisional Approver, etc.
Employee Role	Serves as the Default Role; currently this role contains no functionality.
Search Committee Role	You may be selected (by a Key Contact) to serve on a Search Committee for a particular Requisition. In this role you can view applicants, and submit rankings and leave comments on applicant records.
Facilitator Role	You may be selected (by a Key Contact) to serve as a Facilitator for a particular Requisition. In this role you control the applicant workflow states.
Position	This is an approved record in PA. The Position record contains fields and information previously found in the Position Management Activity (PMA) form, and Administrative/Professional and Office Support & Technical Job Description forms.
Position Class	This replaces the 'Job Family' categories in PeopleSoft with some additions. It is a combination of Employee Class and Position Class fields in Banner. Attributes from the Position Class are defaulted into the Position, Requisition and Hiring Proposal.
Position Library	This is a listing of approved Positions in your division.
Position Action	Position transactions that have occurred are stored as separate records associated with the Position.
Requisition	This is an approved form that authorizes a position to be posted. For Tenure Track Faculty, the Requisition also contains the Recruitment Plan.
Posting	This is information from the Requisition that is visible to the applicant.
Modify	Modify refers to a Position Action used to request a change to something in the Position library.
Edit	Edit refers to your ability to make changes to fields on the Summary section of forms throughout PA.
Workflow	Automated approval process.
Applicant Workflow State	Replaces the concept of changing 'Dispositions' in PeopleSoft.
Hiring Proposal	This replaces the 'Offer Authorization' process in PeopleSoft. For Tenure Track Faculty, the Hiring Proposal also contains the Hiring Commitment.