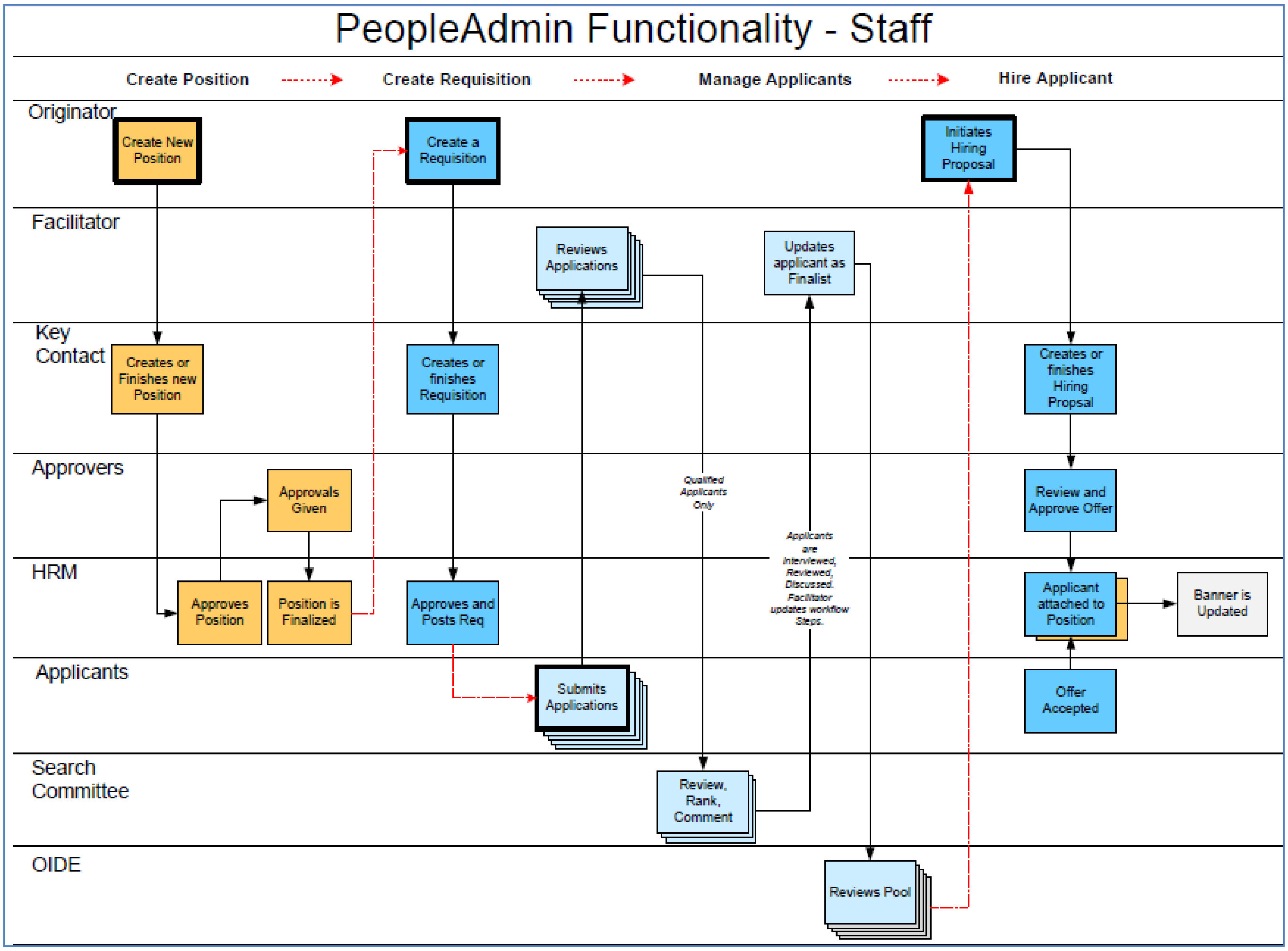
PeopleAdmin

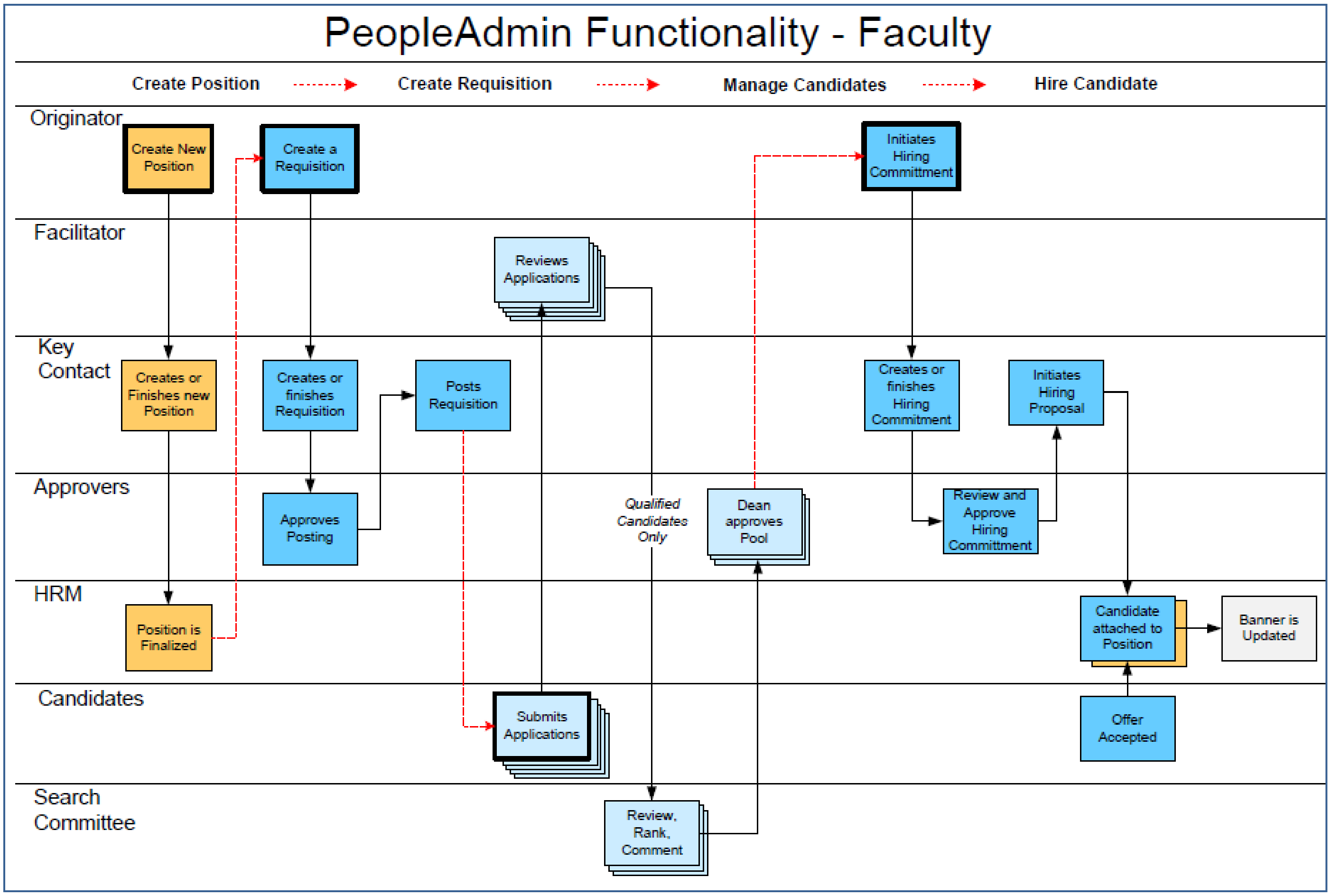
Position Management, Requisitions, Postings and Applicant Tracking System

End User Guide

Table of Contents

High Level Process Overviews



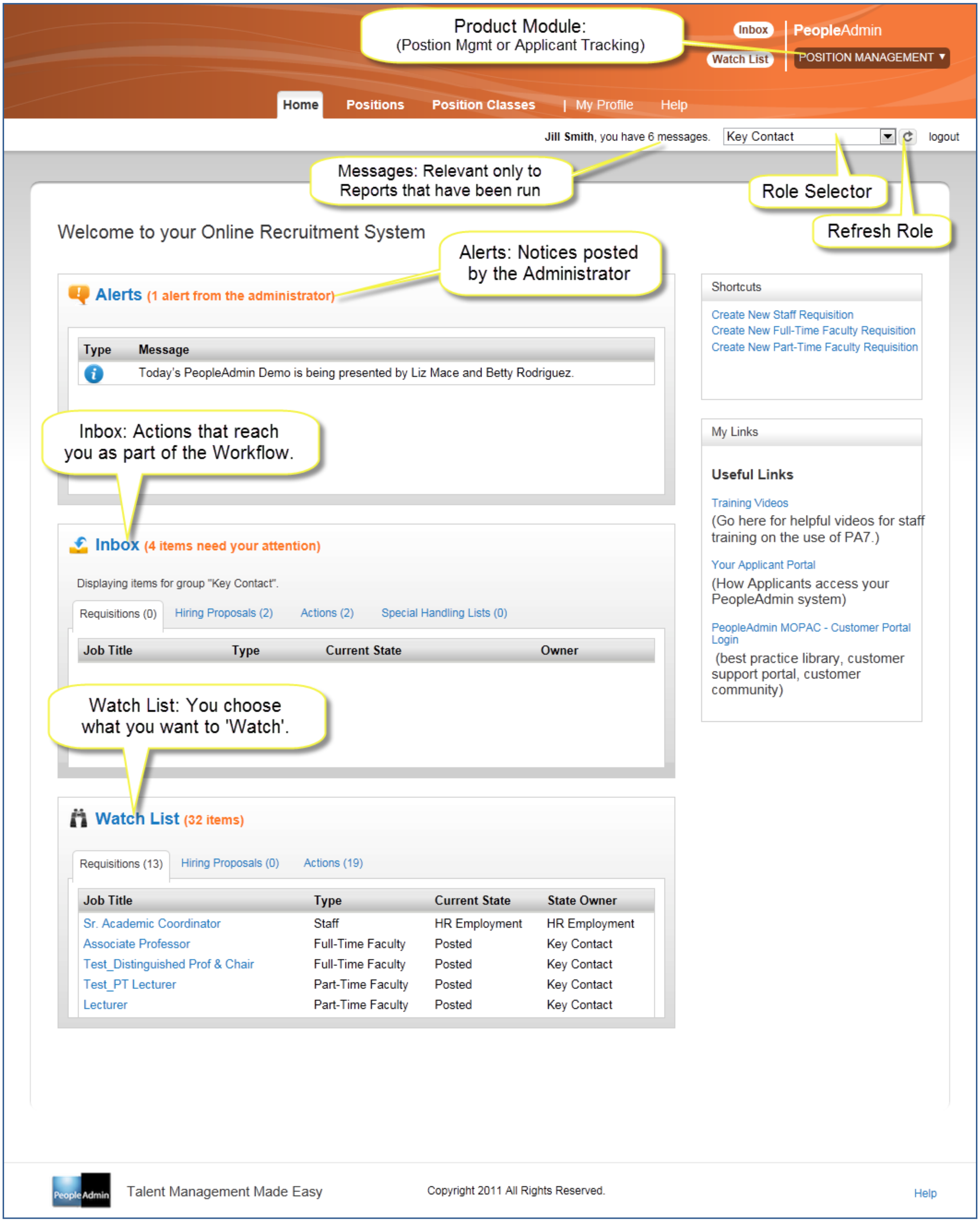

PeopleAdmin Functionality - Faculty
Create Position
Create Requisition
Manage Candidates
Hire Candidate
Originator
Facilitator
Key Contact
Approvers
HRM
Candidates
Search Committee
Create New Position
Create a Requisition
Initiates Hiring Commitment
Reviews Applications
Creates or Finishes new Position
Creates or finishes Requisition
Posts Requisition
Creates or finishes Hiring Commitment
Initiates Hiring Proposal
Approves Posting
Qualified Candidates Only
Dean approves Pool
Review and Approve Hiring Committment
Position is Finalized
Candidate attached to Position
Banner is Updated
Submits Applications
Offer Accepted
Review, Rank, Comment

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:
(Postion Mgmt or Applicant Tracking)
Inbox
Watch List
PeopleAdmin
POSITION MANAGEMENT
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: Notices posted by the Administrator
Alerts (1 alert from the administrator)
Type
Message
Today's PeopleAdmin Demo is being presented by Liz Mace and Betty Rodriguez.
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)
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
Talent Management Made Easy
Copyright 2011 All Rights Reserved.
Help

Position Management

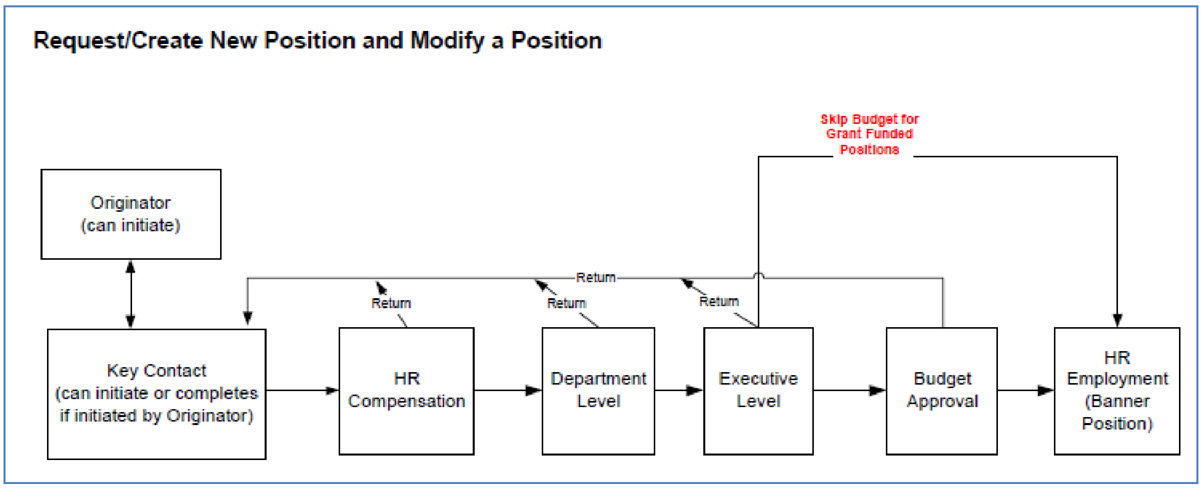
Staff

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

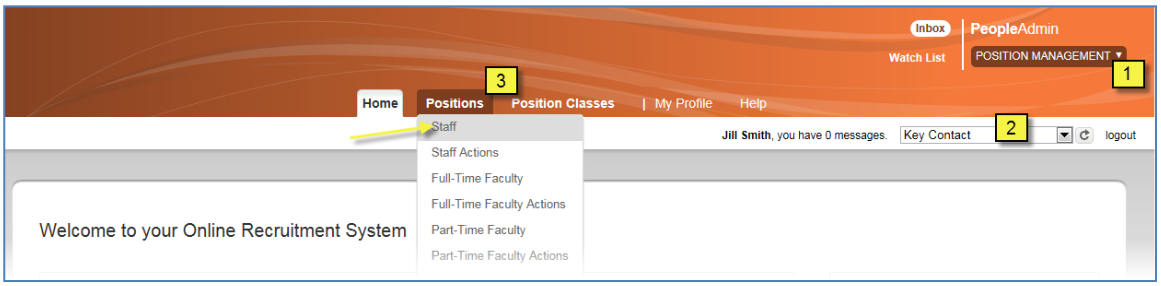
A new Position can be initiated by an Originator or a Key Contact. If you create a Position in the role of an Originator, the Position will go to the Key Contact next, and then the Key Contact will send it to HR Compensation (HRC). HRC will review and make any appropriate adjustments to the attributes 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.

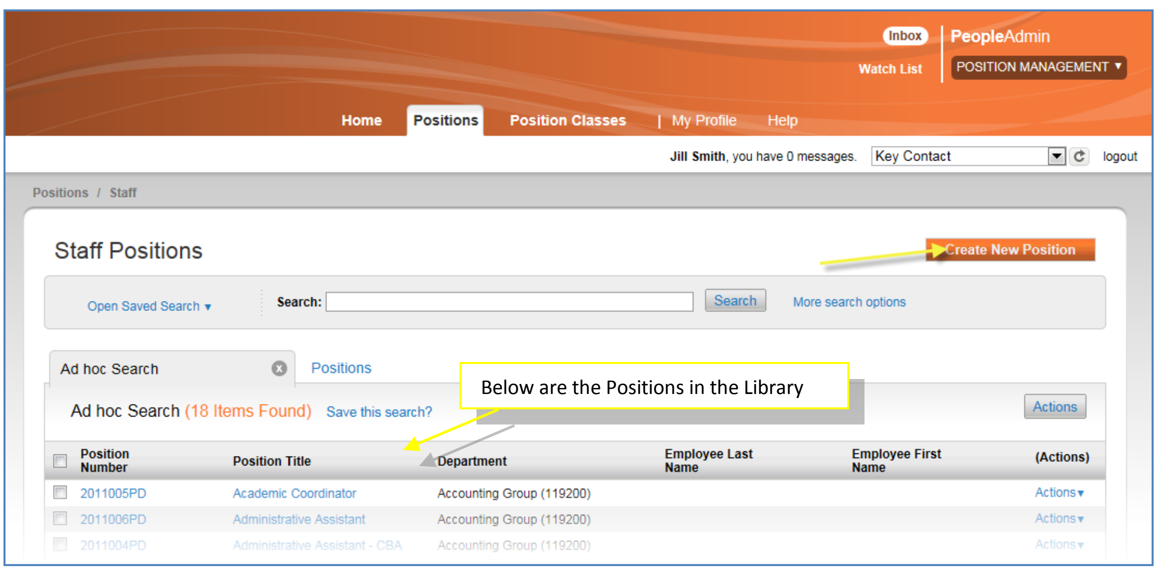


Steps to Create a Staff Position

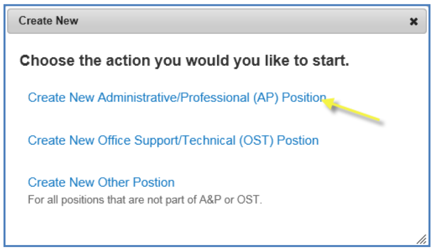
1. Select the Product Module of Position Management
2. Select the Role of Originator or Key Contact
3. Select the Positions tab, and choose Staff.
   - ➢ Staff = View the Positions Library, and Create Positions.
     - ✓ You must go to the Library to initiate a 'modify transaction' or look at existing 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 



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.

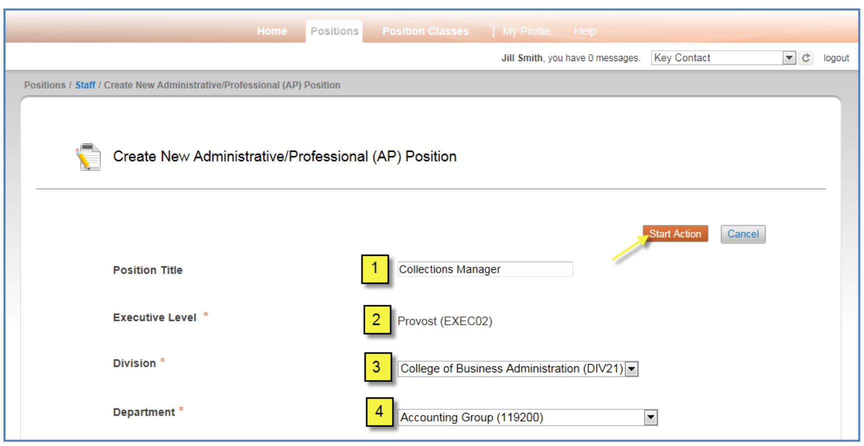


Choices in the Create New window:

- **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.

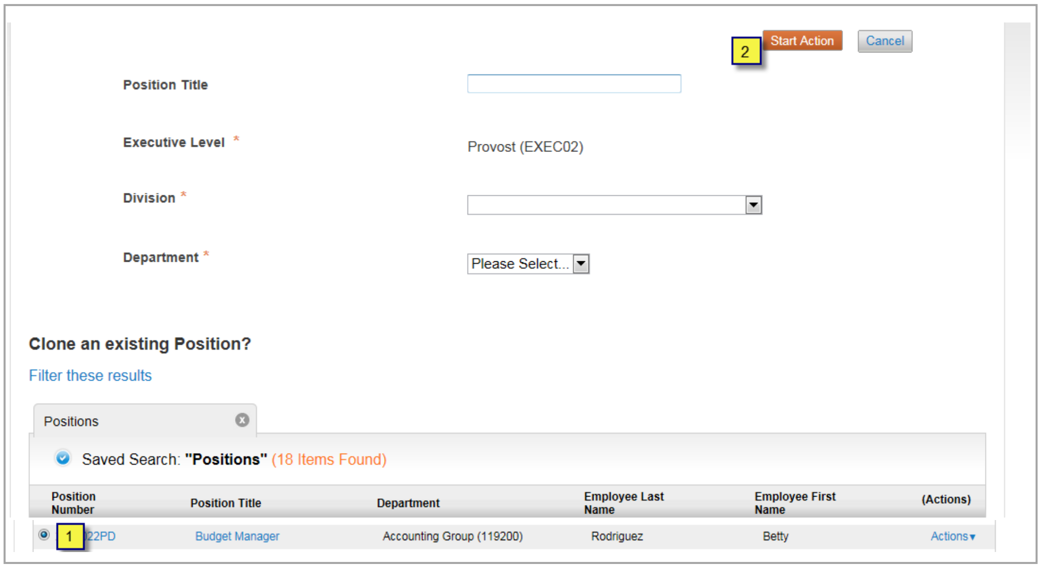
6. The first 4 fields you will see are:
    1) Position Title
    2) Executive Level (defaults based on the user's system security)
    3) Division: (defaults based on the user's system security)
    4) Department: Select the Department in which this Position will reside. This field only relate to the system <u>security</u> 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. 



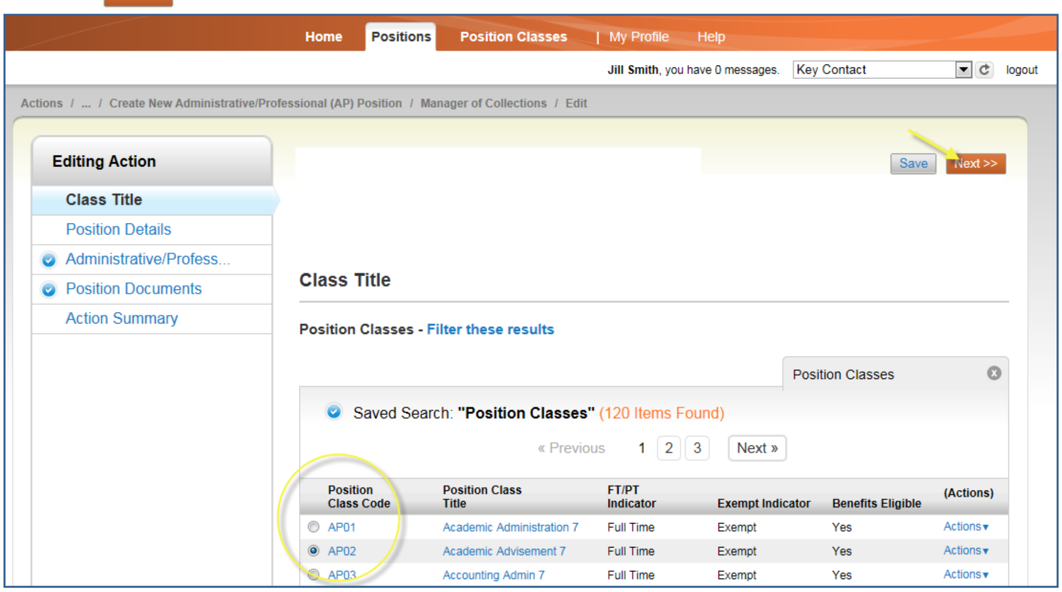
Note: You may choose to instead 'clone' an existing position. (All of the attributes associated with this selected Position will carry over to this new Position.) Leave Org fields blank and:

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

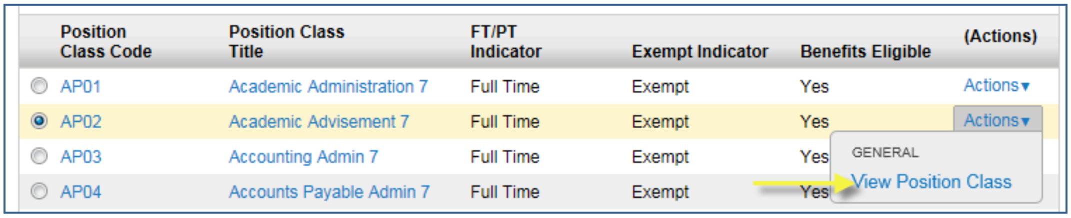


7. The next page will ask you to select a Class Title. (If you choose to clone a Position, go to step 7a on the next page). If you are unsure of the Class, you may skip this step and HR Comp will fill it in for you.
   - ➢ If you know which Class to select, select the Class and Press Next. To skip this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

Next >>

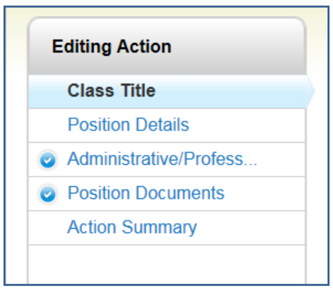


To view the attributes of a Class, go to the Actions column and select View Position Class. You may also click on the Position Class Code / Title.



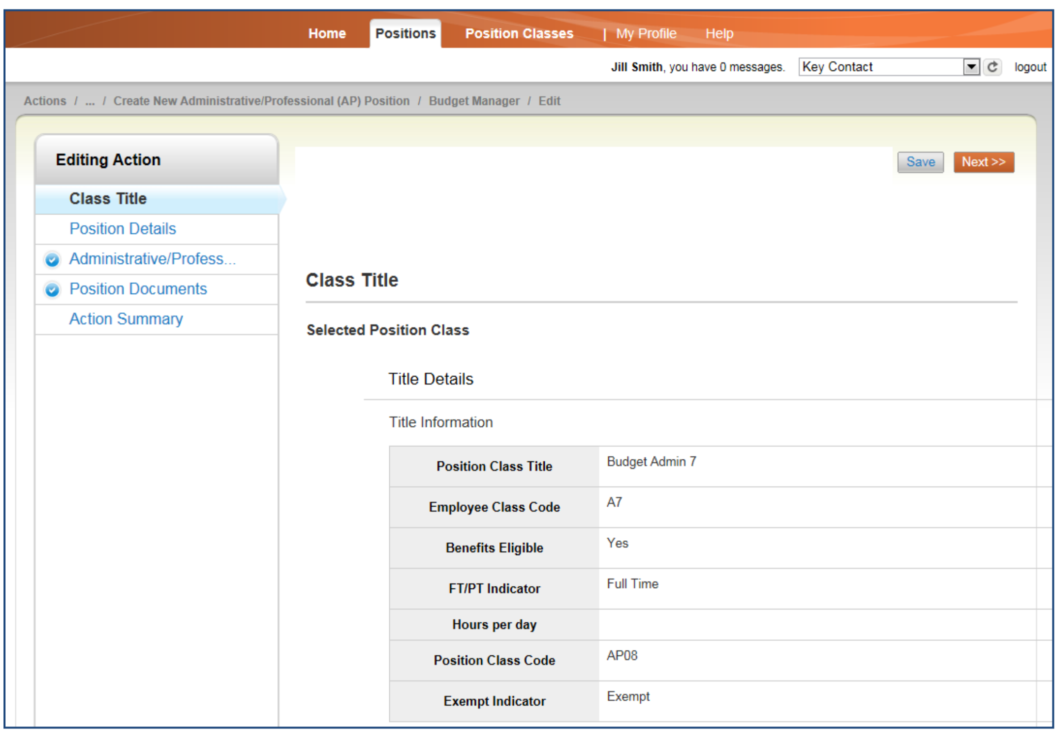
Note: Pressing 'View Position Class' may result in a window that warns you that you will lose unsaved data. Press cancel, Save the Position Save and go to Actions > View Position Class again.

Note about the Staff Positions section:



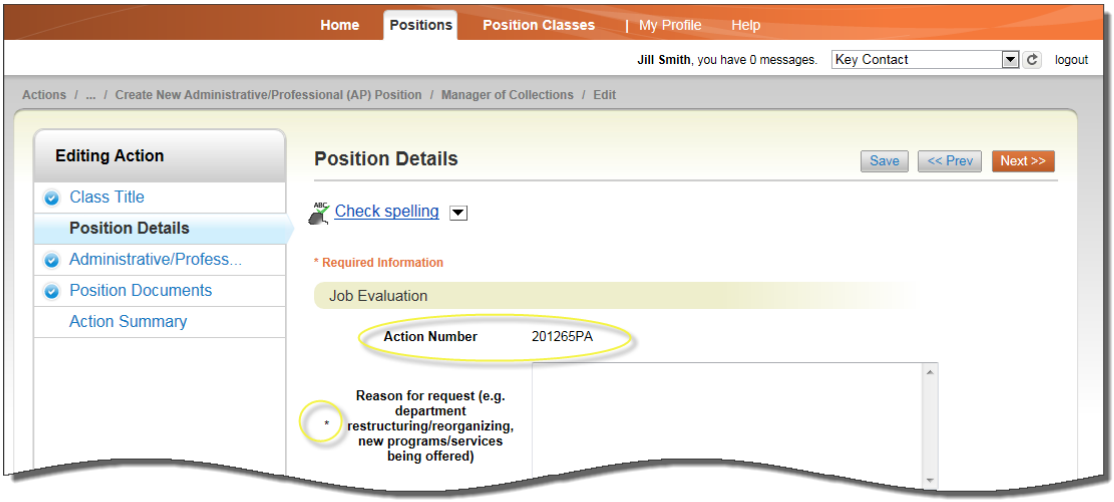
A left-hand menu bar appears at this point. It is useful for navigation purposes and provides information about the contents of this Form.

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 Save. Save .



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.

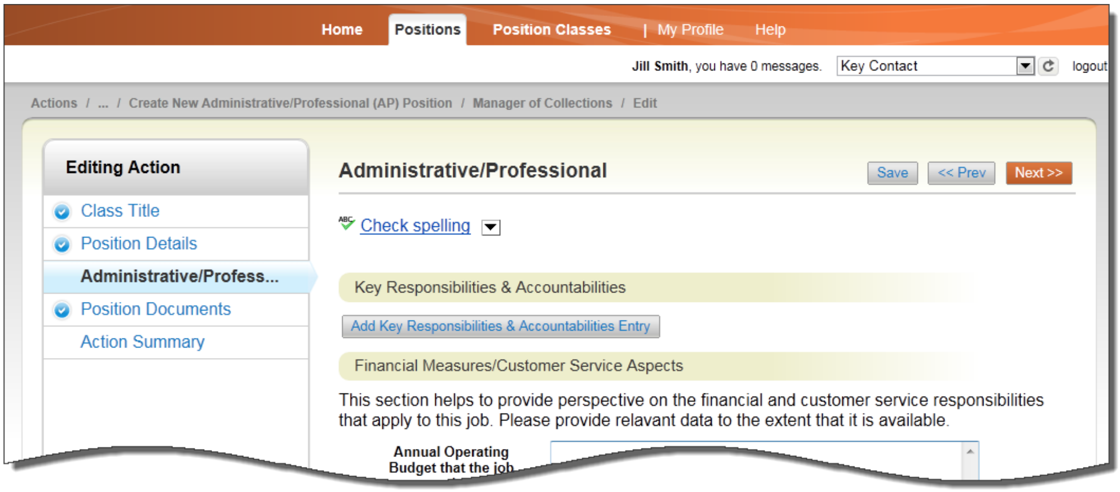


Position Details Form	
Field	**Notation about the Field**
Action Only (not in library) section (The fields in this section are tied to this action only, not written to the Position Library and not viewable to the applicant or to the employee.)	
Action Number	System auto-assigned. The Action number will 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	Information you enter here will be used by HR/Comp in the Job Evaluation process.
New/different skill or competency requirements	
Other changes / add'l information	
Other positions that have similar responsibilities	
Expected outcomes	
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?	Answer this question if the answer to the Funding type (above) is 'Reallocated'. Possible values are Yes or No. • 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 >>

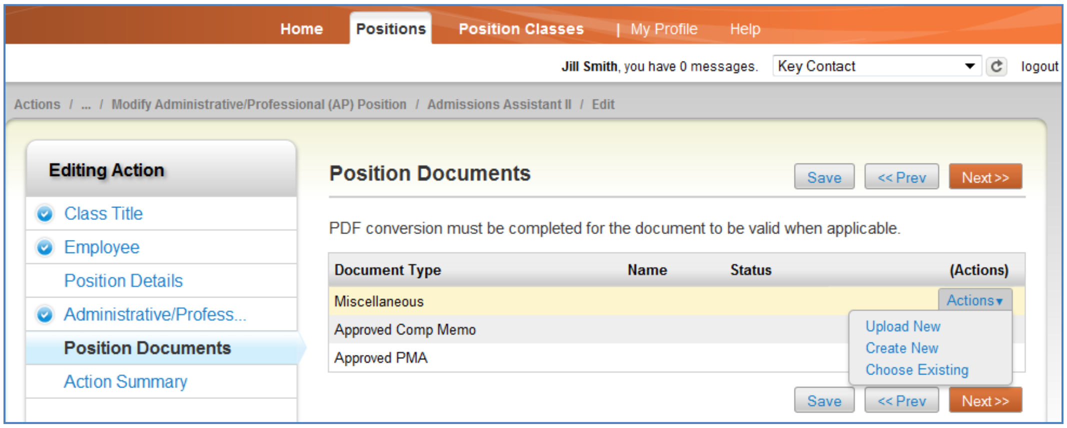
10. The Administrative/Professional section of the form appears next.



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	

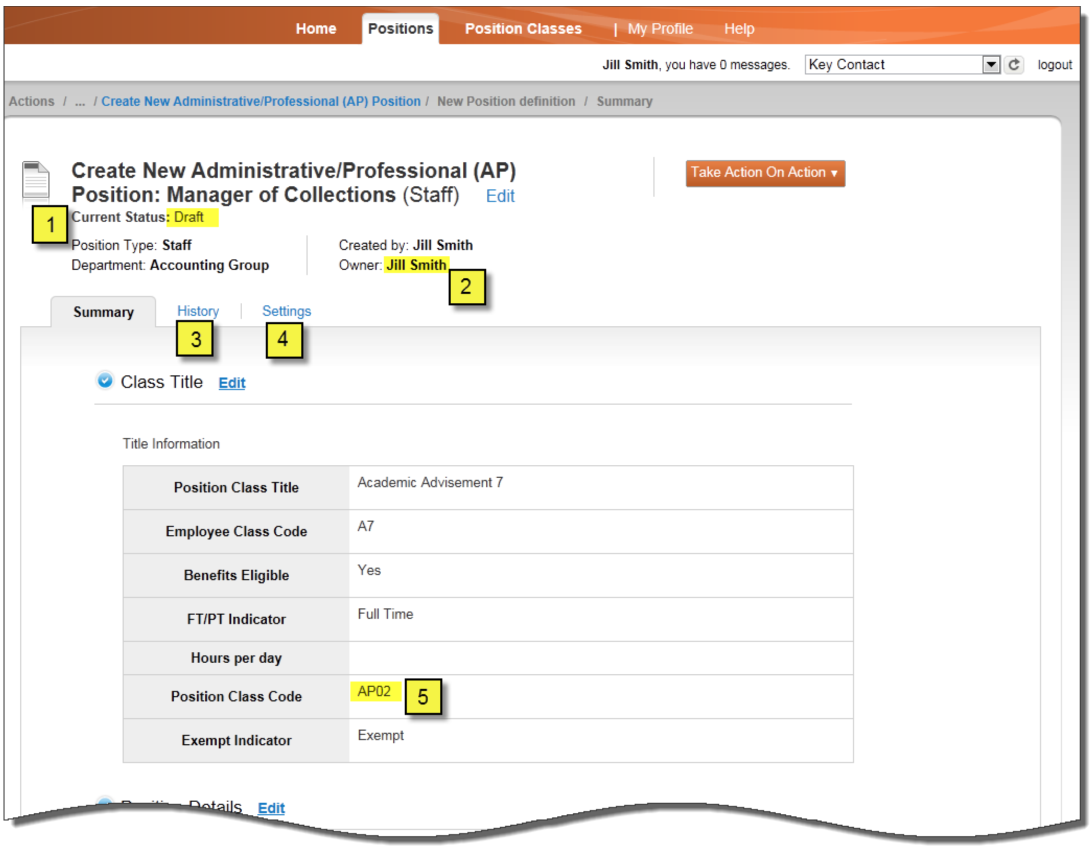
11. Press next to continue Next >>

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.

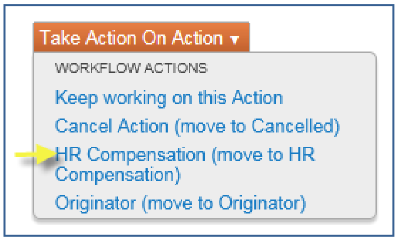


13. Press next to continue 

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.



15. Press the Take Action on Action button

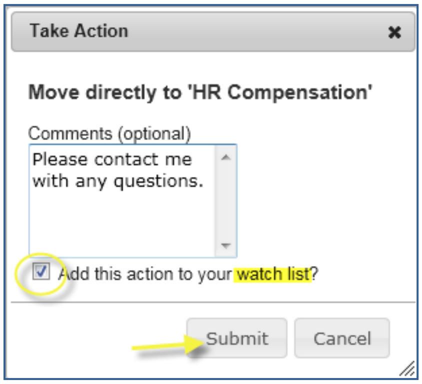


The **Take Action** selection will move this Position action to the next step in the Workflow (see the Flow Charts). Four choices are:

- **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.

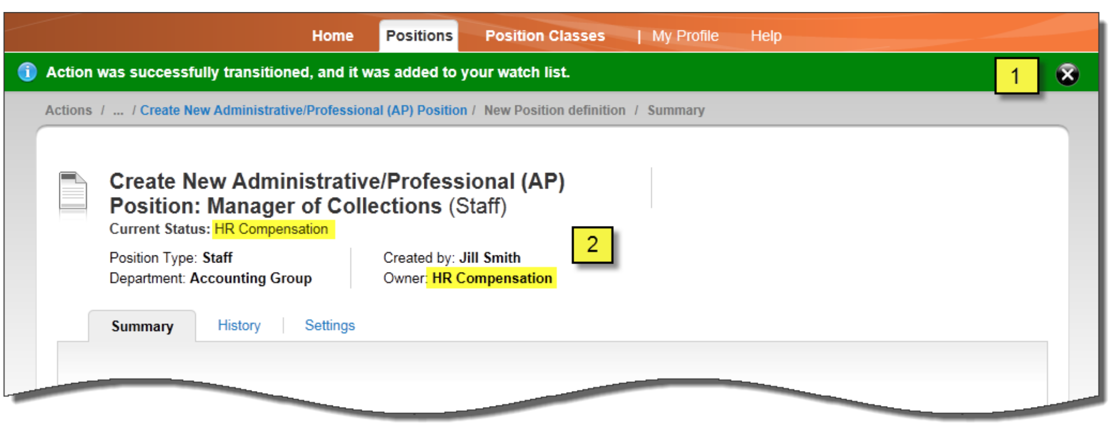


The Take Action window:

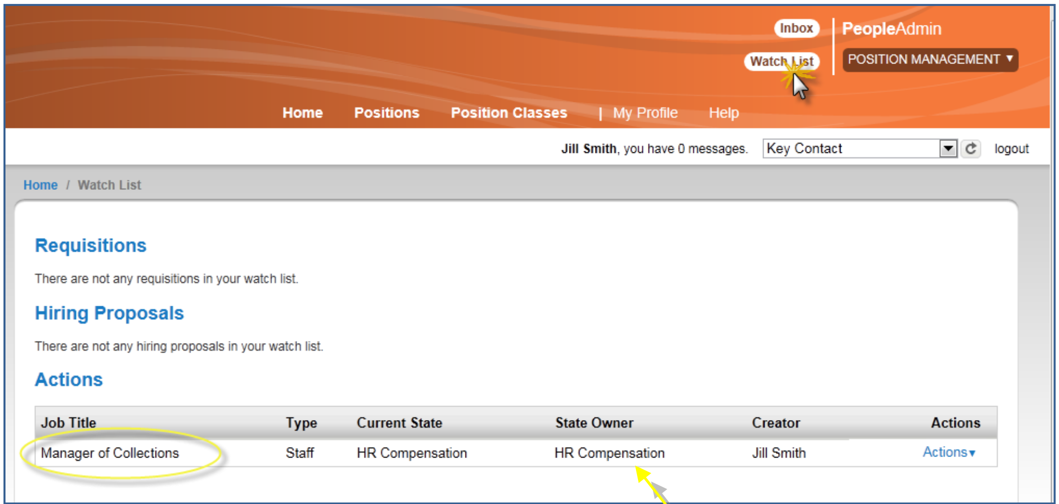
- You can enter a **comment** which would appear in the transition email to HR/Comp. (Comments do not get stored in the Position library).
- The checkbox for "**Add this action to your watch list**?" is defaulted as checked. You can monitor the subsequent activity of this action using your Watch List.

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.



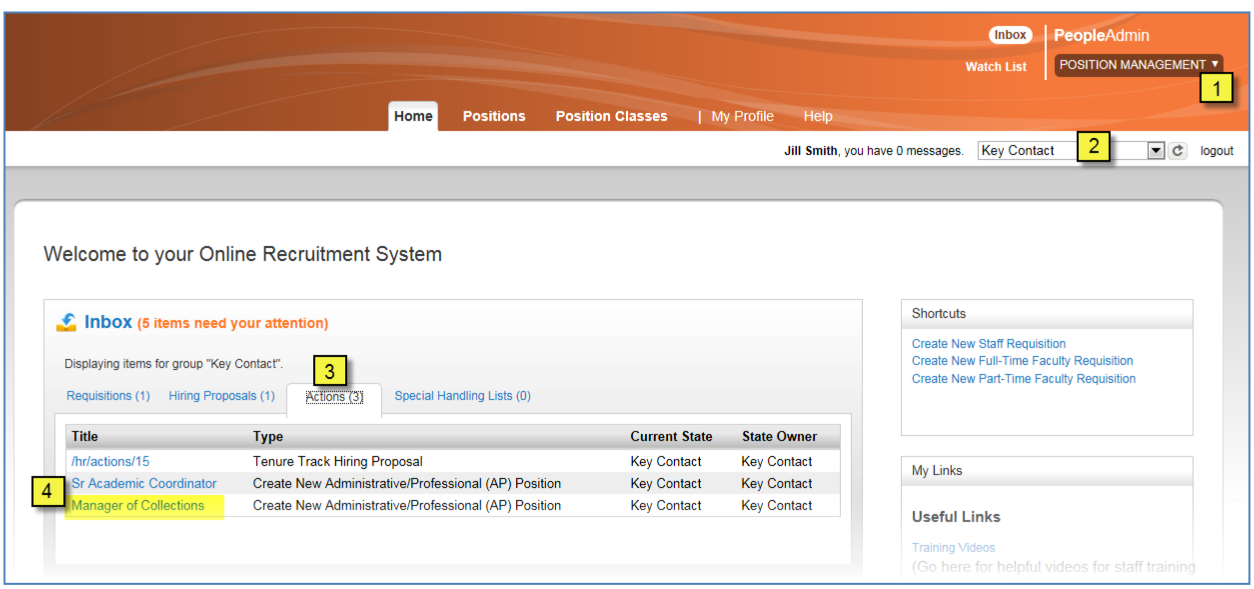
20. Check your Watch List: Press the Watch List button 



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.



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

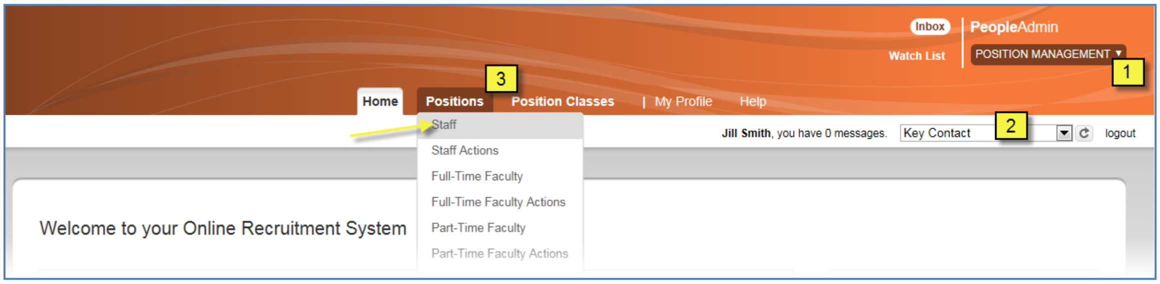
Modify a Staff Position

In the event anything needs to be changed in a Position **which is in the Library**, whether or not there 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:**

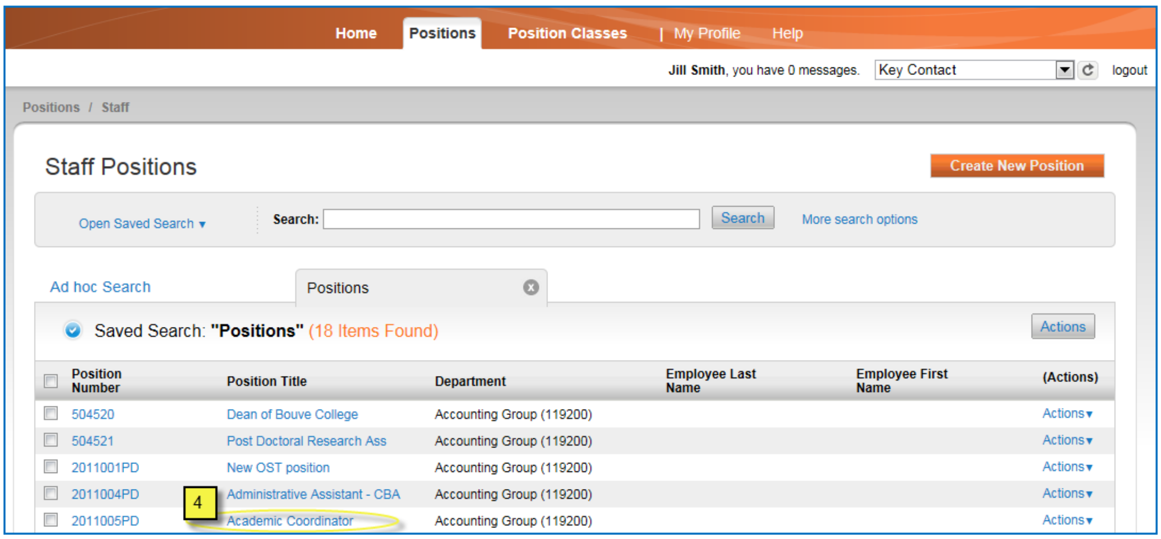
Ex: Position information that needs to be changed	Position is Vacant or Filled	Employee Impact?	Banner Impact?	Workflow
A. Part of the Job Description, such as Responsibilities.	Vacant or Filled	No	No	Originator > Key Contact > HR Compensation. HR Compensation is final Approval.
B. Fields in the Banner 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

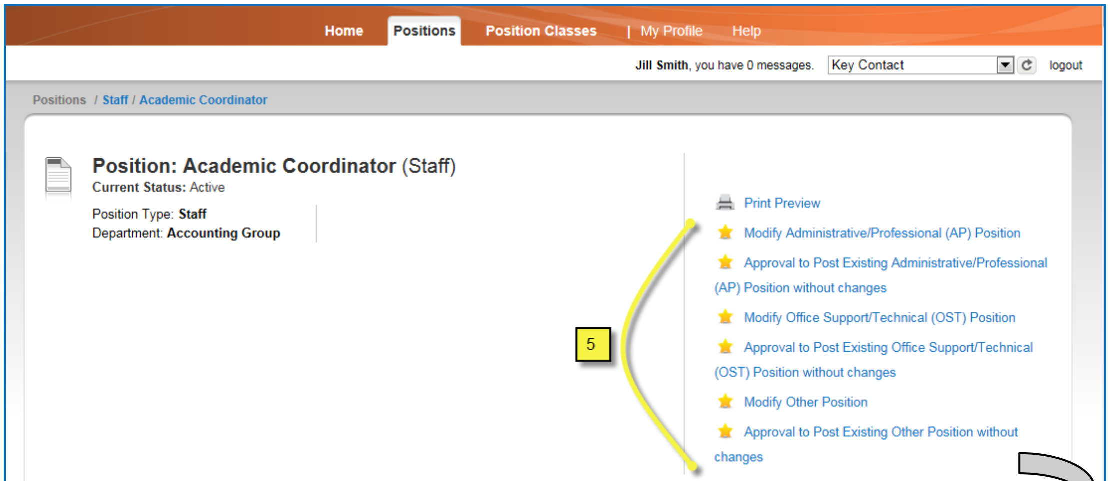
1. Select the Product Module of Position Management
2. Select the Role of Originator or Key Contact
3. Select the Positions tab, and choose Staff



4. Select the Position
   - ➢ In this example, we will modify the Title and Grade of the Academic Coordinator Position.



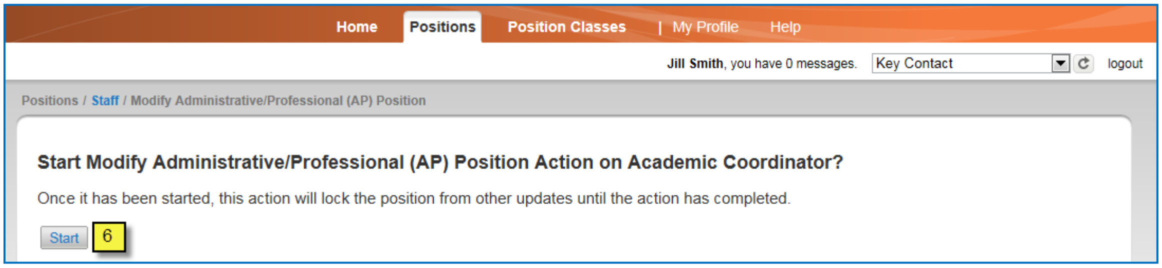
5. Select an Action from the list on the following page. (Note: if you do NOT see these list items, it means that the Position is currently being modified, and you may not modify it until that action is completed). (We will select Modify Administrative/ Professional (A/P) position.)



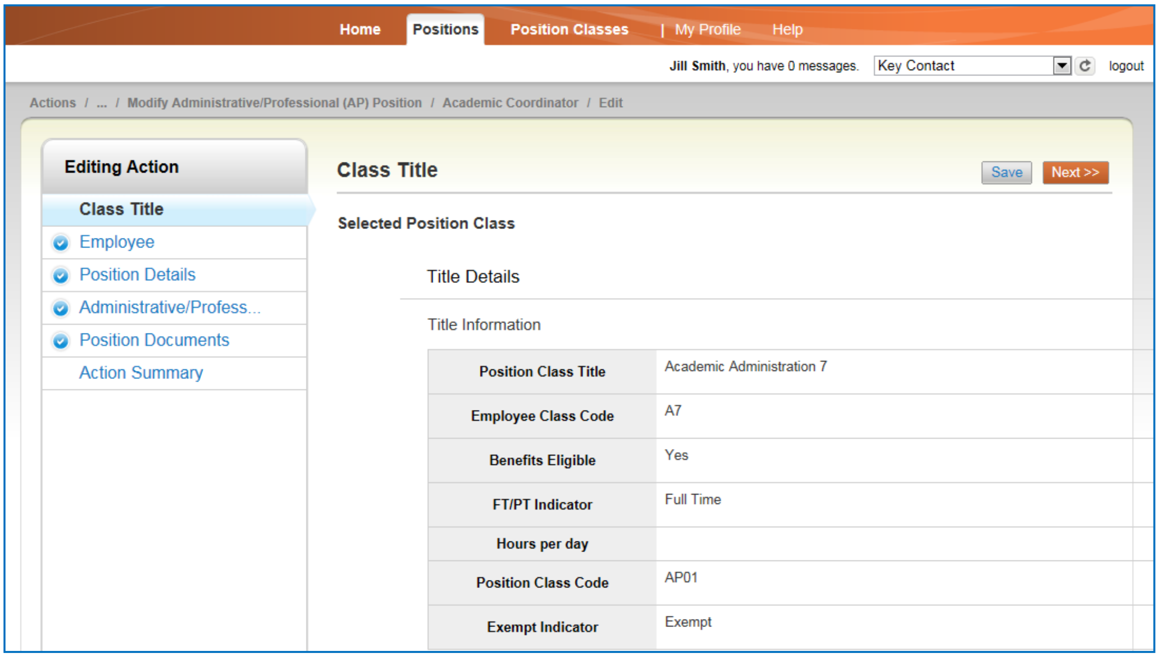
Action List Item	Impact of this Choice
Administrative/Professional (A/P):	
Modify Administrative/Professional (A/P) Position	This form is unique to the 'Administrative/ Professional (A/P)' Positions. Changes made on this form will follow the Workflow steps previously described in this section.
Approval 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.
Office Support / Technical (OST):	
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.
Other (use this to create to Research Scientist Grades 10-13 Positions)	
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.

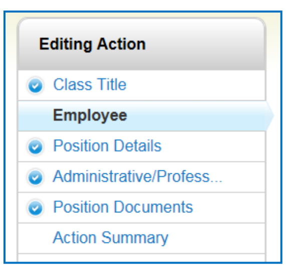
6. On the next page Press Start. Once this action has started, it will be locked from other updates until the action has been completed



The next page opens up the Position form.

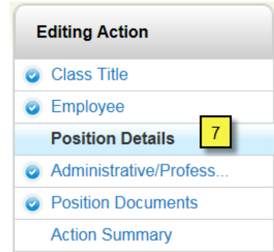


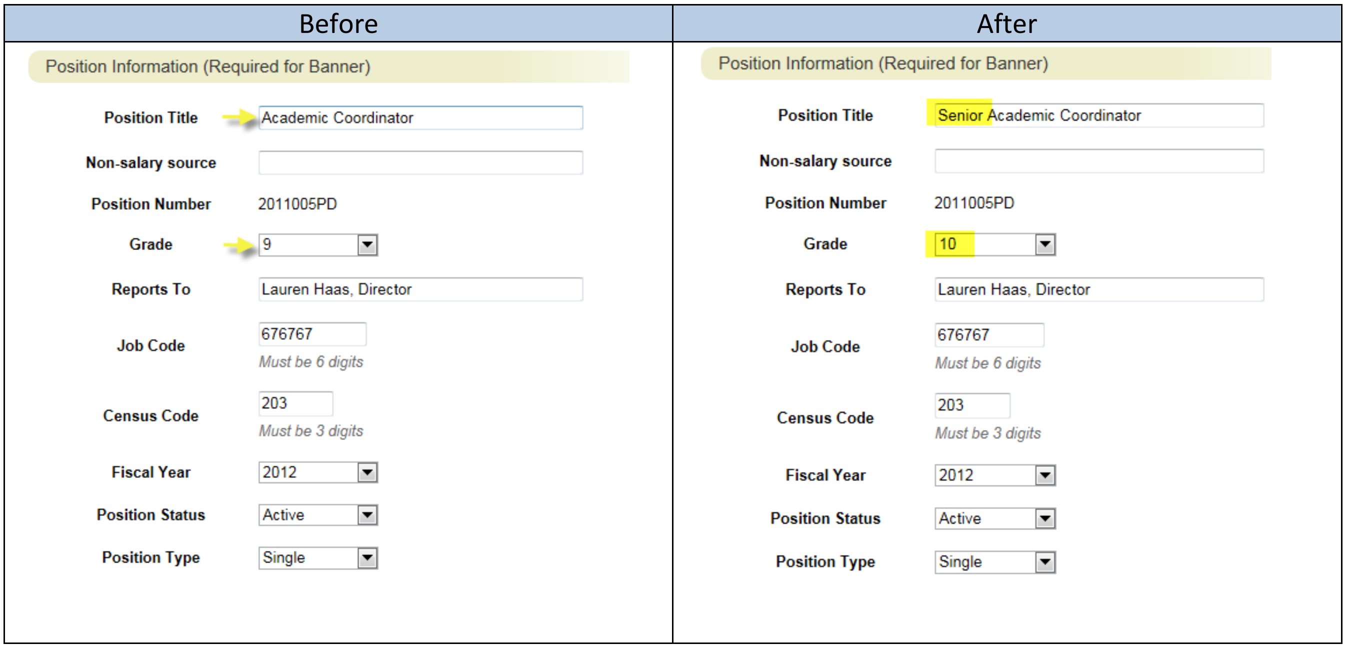
Note about the Editing Action Menu Tabs:



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.

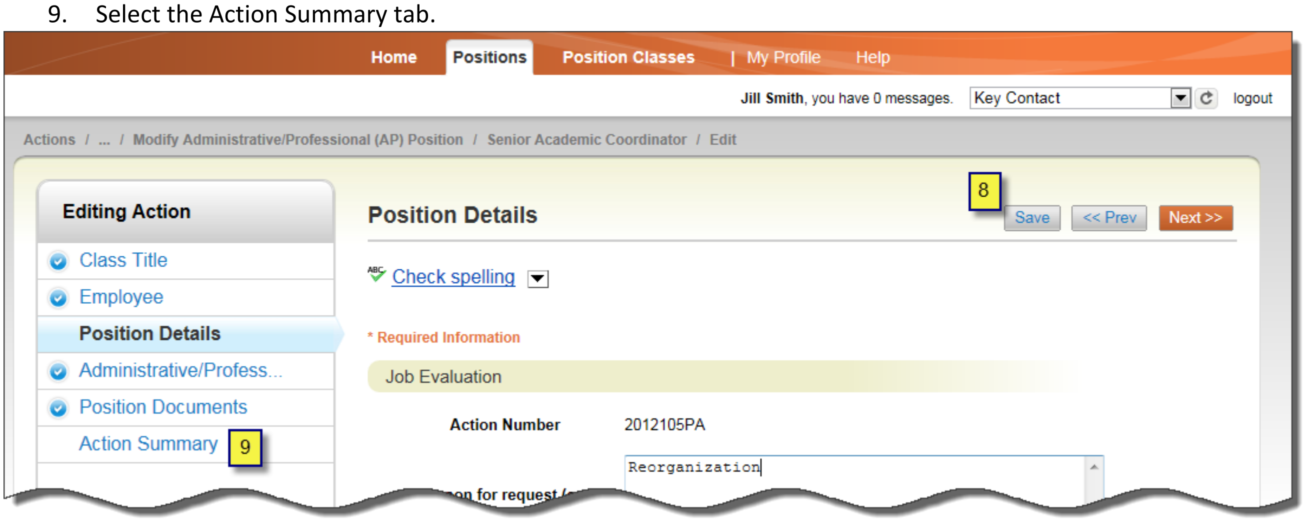
7. To change the Title and Grade, go to the **Position Details** tab and scroll to the Position Information section. Change the title, and use the drop-down to select the new grade.





8. Scroll to the top of the page and press 

9. Select the Action Summary tab.

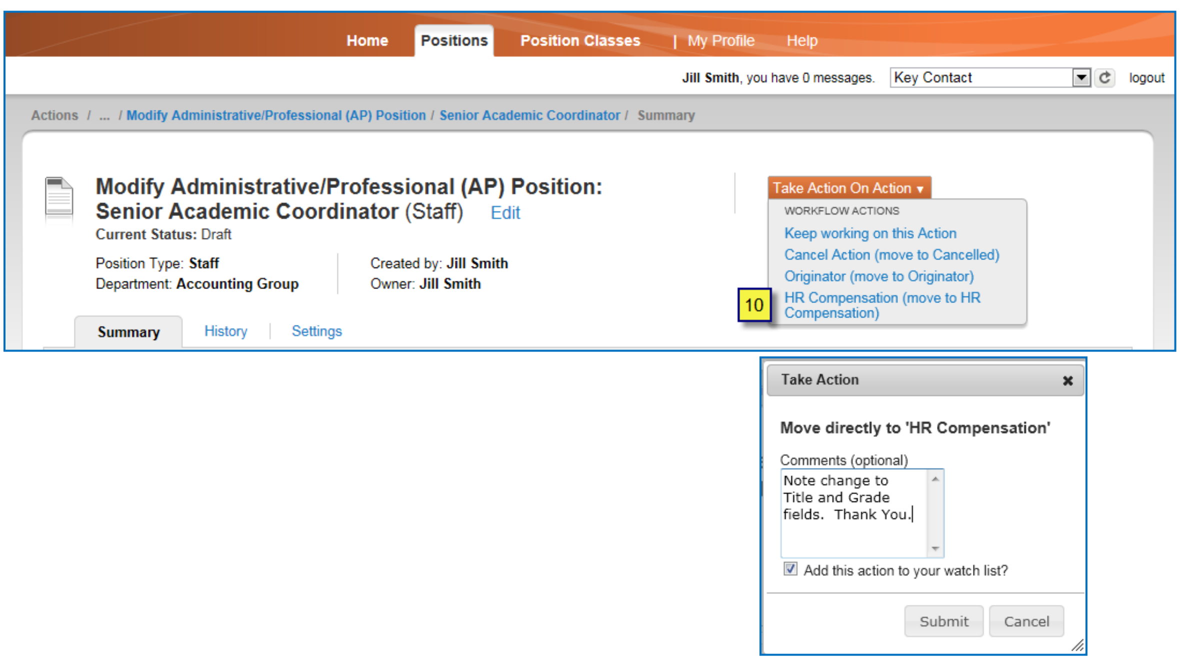


On the Action Summary page, scroll to the Position Information section, and note that the current value and changes values are shown.

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

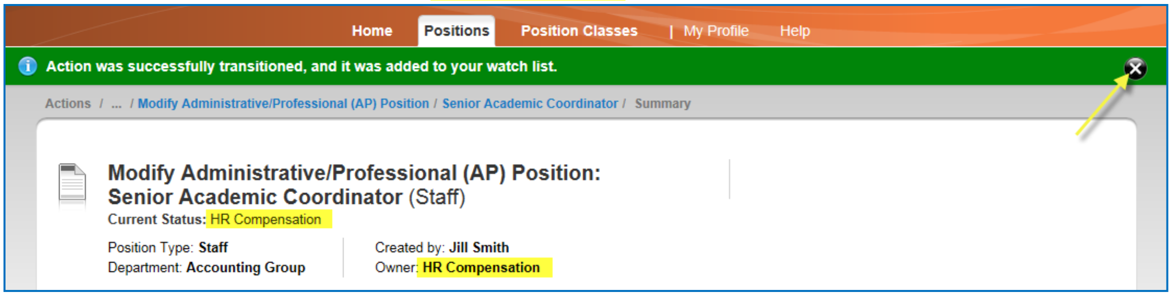
10. Scroll back to the top of the page and press Take Action On Action ▾
    - Select HR Compensation.
    - Add a note (if applicable) in the Take Action window and press Submit.



The next page shows the results of your submission:

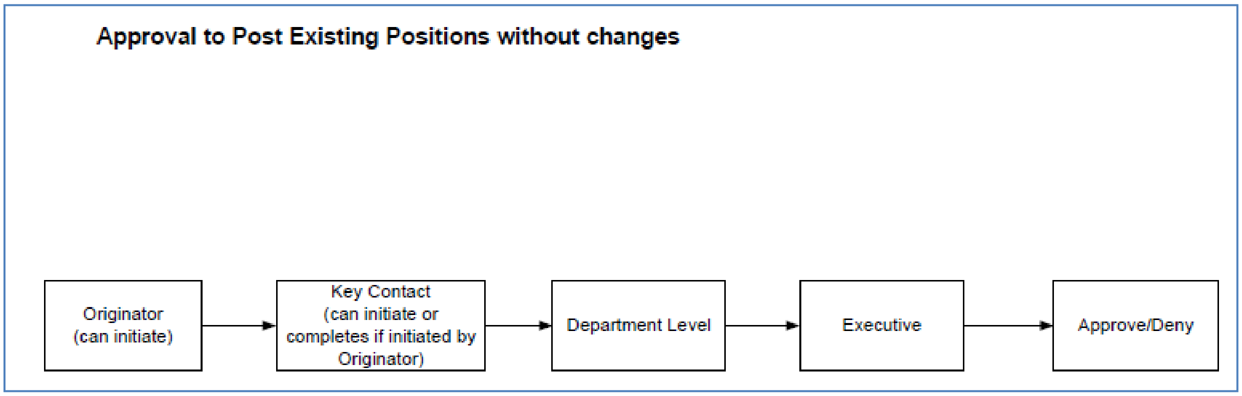
A green bar with the 'success' message appears next (press the x icon  to close the green bar). If this bar is red you will see an error message, typically indicative of a missed required field. You can go back in and edit the form and re-submit.

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



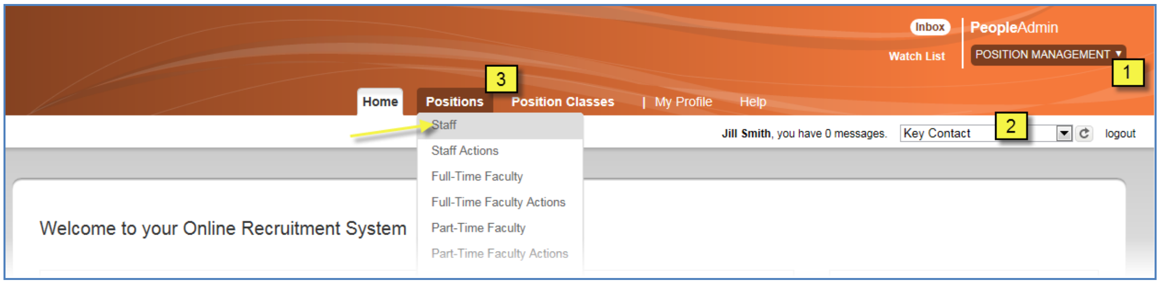
Post an Existing Staff Position With no Changes

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.

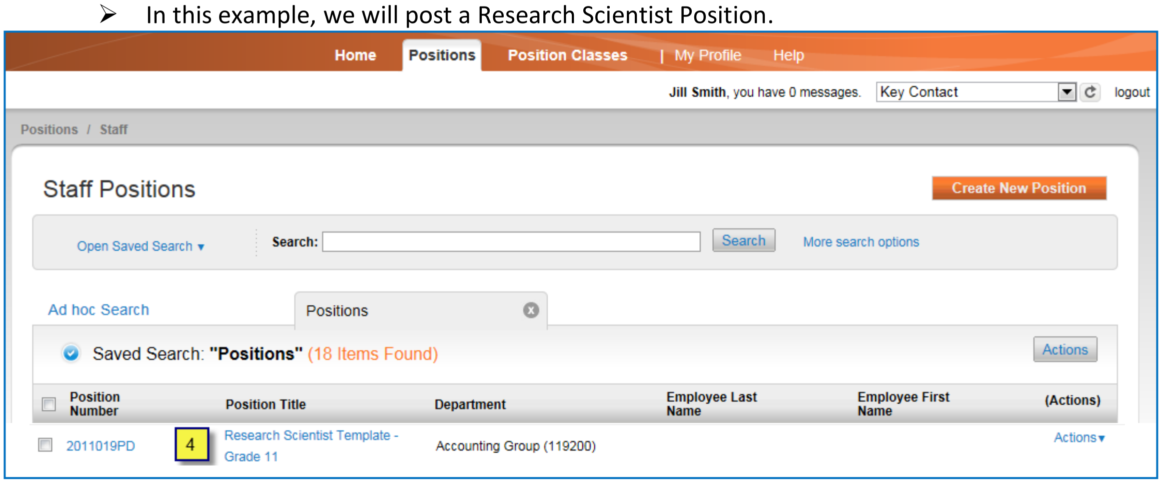


Steps to Post a Position with no Changes

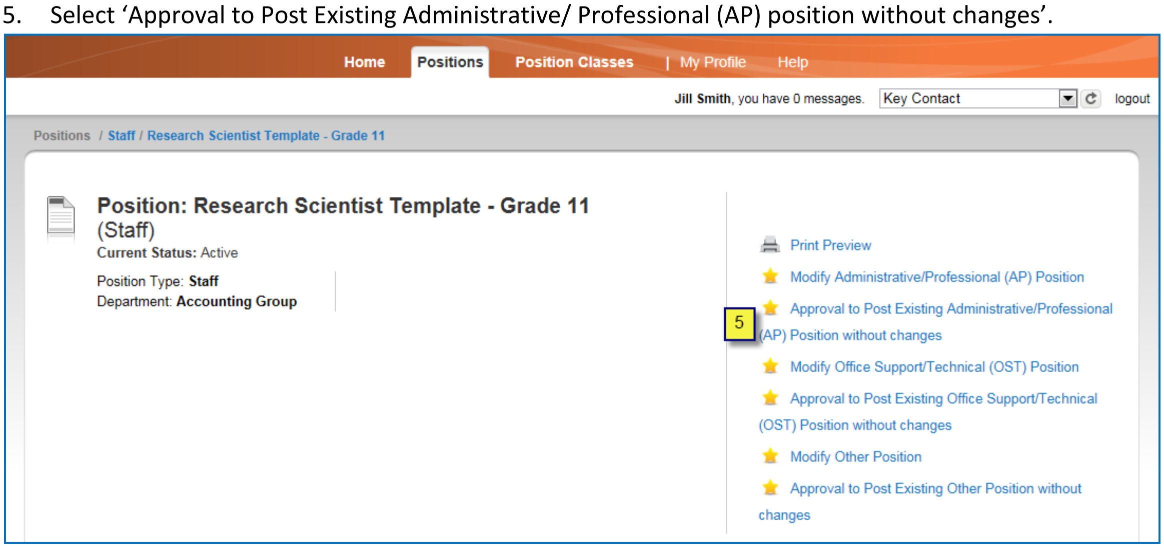
1. Select the Product Module of Position Management
2. Select the Role of Originator or Key Contact
3. Select the Positions tab, and choose Staff



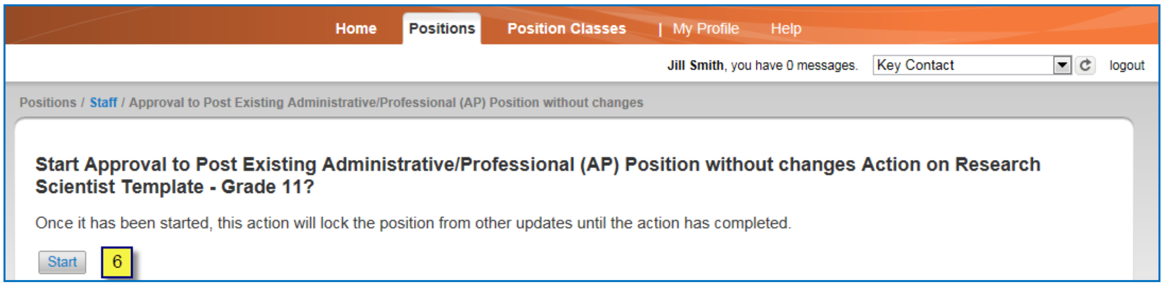
4. Select the Position by clicking on the Position Number or the Position Title.
   - In this example, we will post a Research Scientist Position.



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

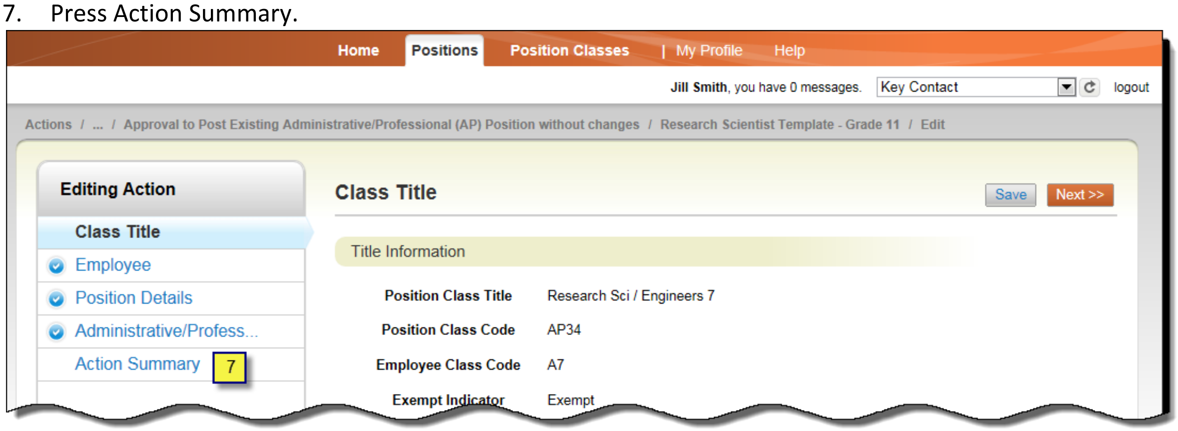


6. On the next page Press 



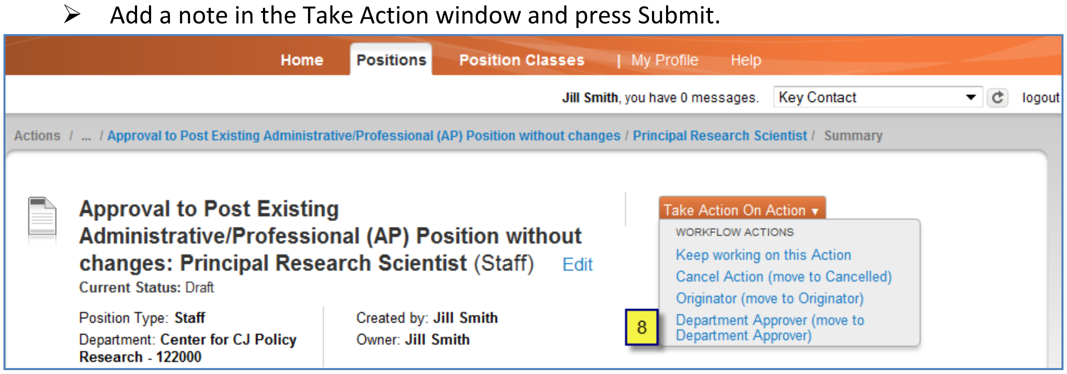
On the next page you can view the attributes of the Position by clicking on the left hand tabs.

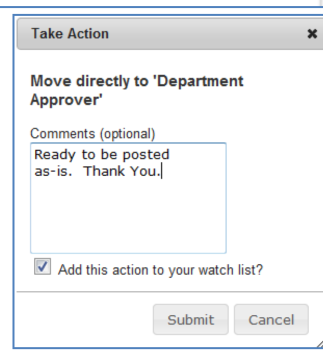
7. Press Action Summary.



8. Press 

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

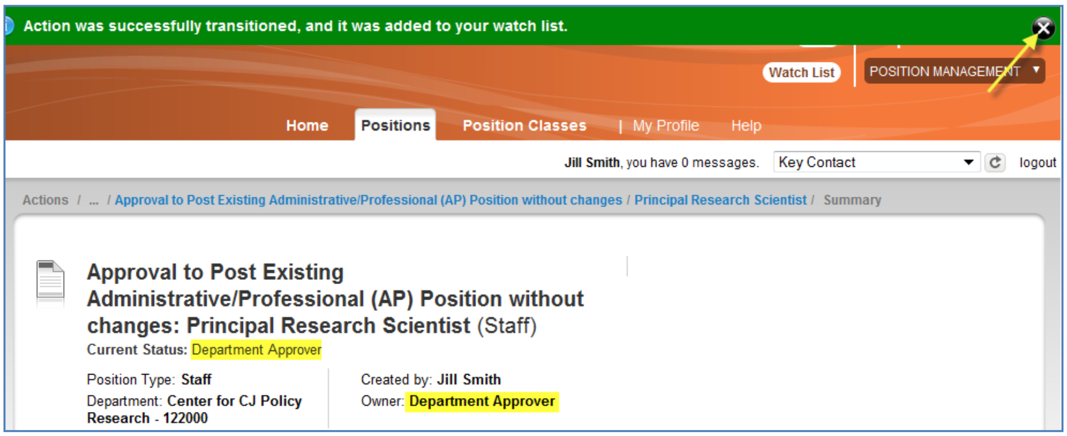




The next page shows the results of your submission:

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 Department Approver. You now cannot edit the Position Action.

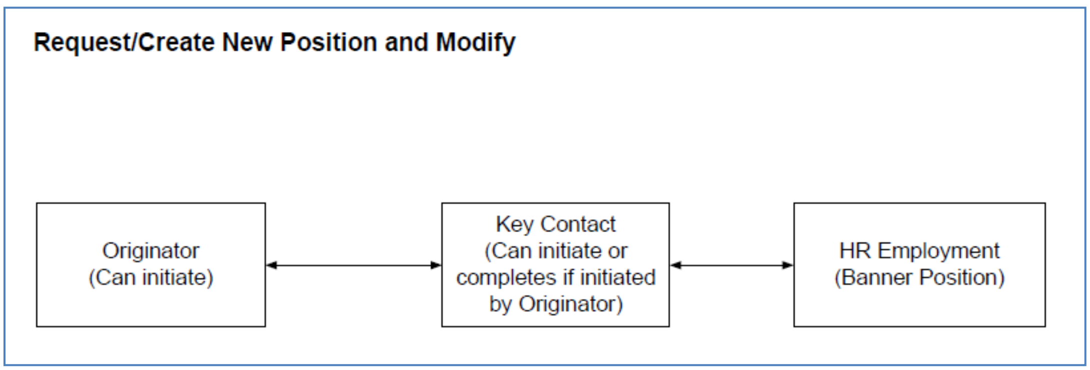


Faculty

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

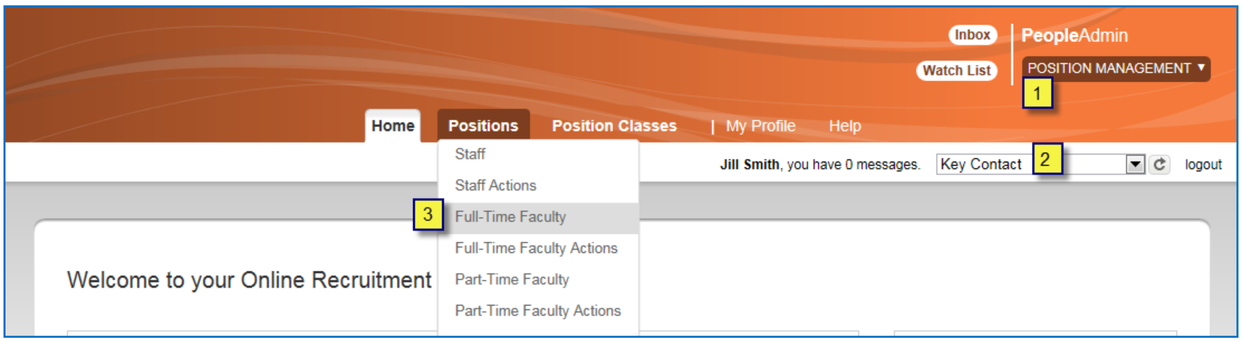
Create New Full-Time or Part-Time Faculty Position

- 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 need 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.

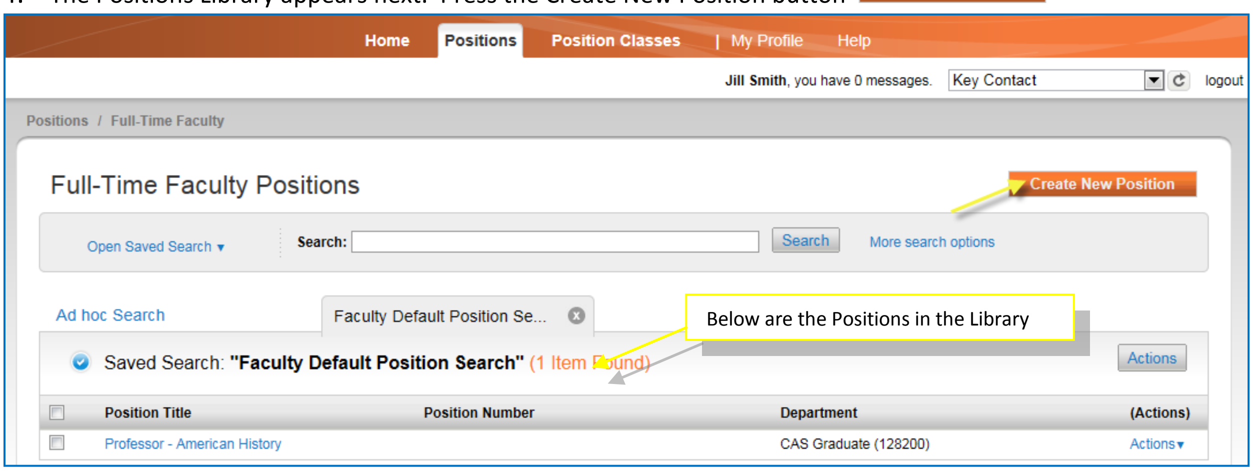


Steps to Create a new Full Time or Part Time Faculty Position

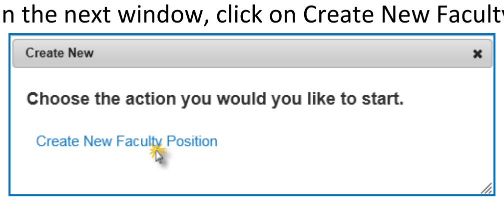
1. Go to Positions Module
2. Change role to an Originator or a Key Contact.
3. From the Positions tab, select Full-Time faculty
    a. Full-Time Faculty = View the Positions Library, and Create Positions.
        i. You must go to the Library to initiate a transaction or look at existing Positions.
    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 

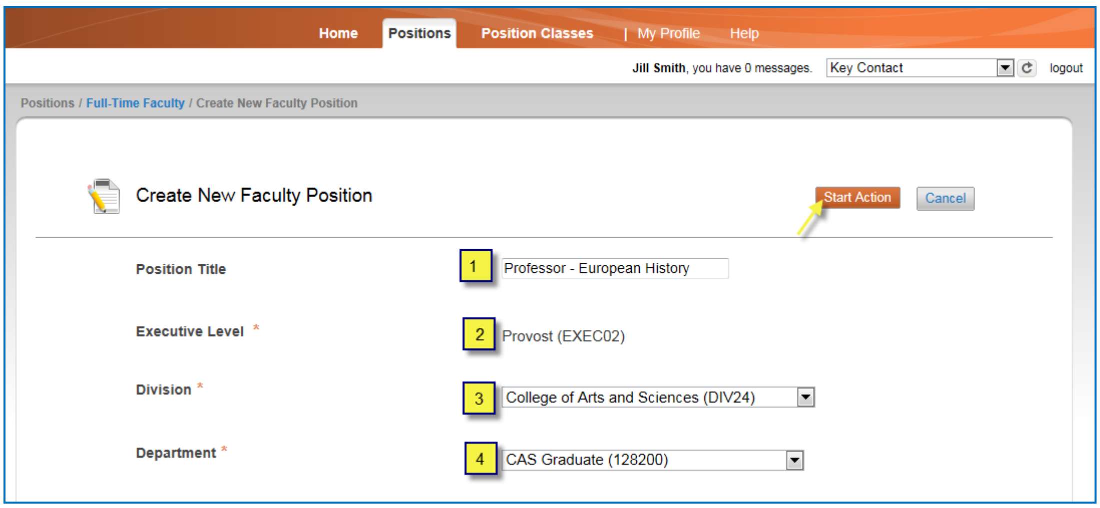


5. In the next window, click on Create New Faculty Position.



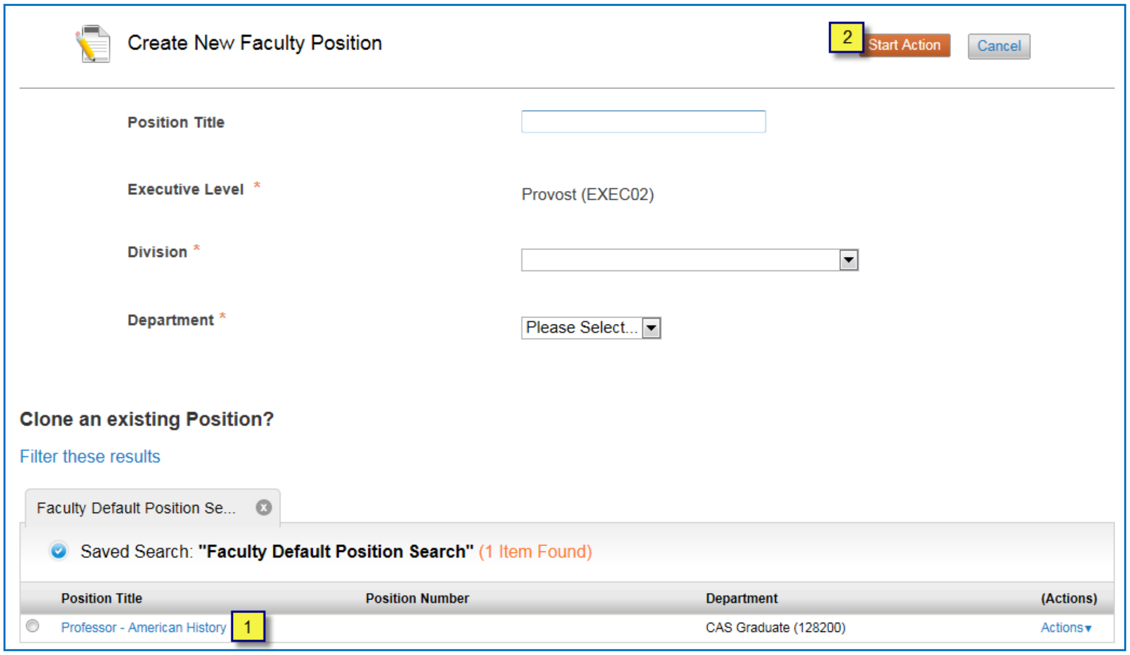
6. On the next page, The first 4 fields you will see are:
    1) Position Title
    2) Executive Level (defaults based on the user's system security)
    3) Division: (defaults based on the user's system security)
    4) Department: Select the Department in which this Position will reside. This field only relate to the system <u>security</u> 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

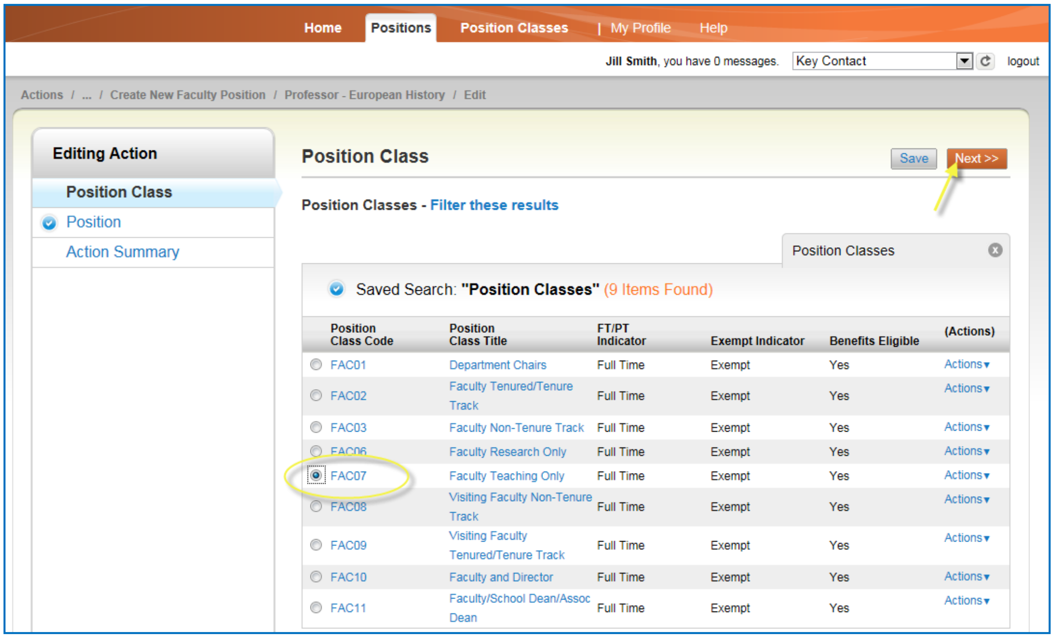


Note: You may choose to instead 'clone' an existing position. (All of the attributes associated with this selected Position will carry over to this new Position.) Leave Org fields blank and:

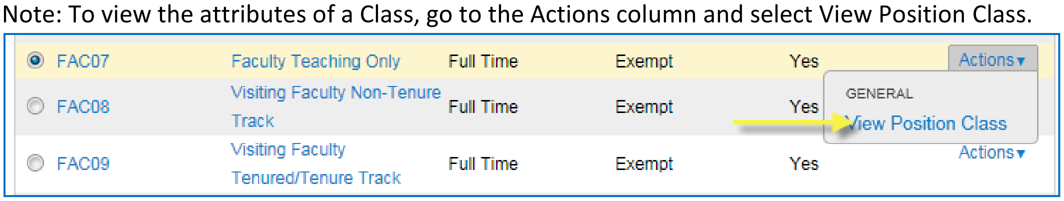
1) Select a Position from the Library shown on the page
2) Press Start Action.

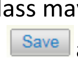


7. The next page will ask you to select a Class Title. (If you chose to clone a Position, go to step 7a on the next page). The attributes of the Class are Benefit Eligible, FT/PT, Hours and Exempt Indicator and these values will carry over to the new Position. If you are unsure of the Class, you may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

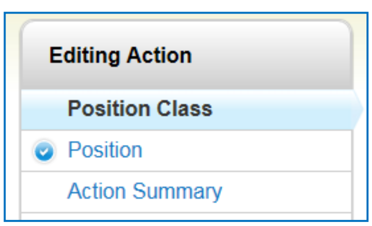


Note: To view the attributes of a Class, go to the Actions column and select View Position Class.



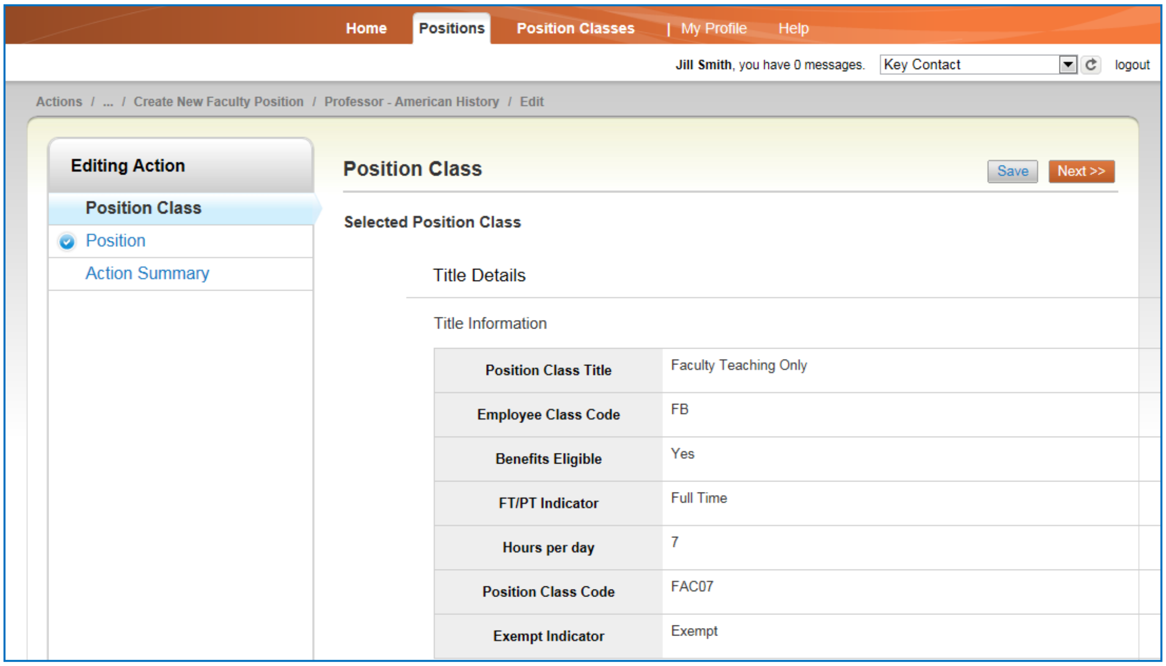
Note: Pressing View Position Class may result in a window that warns you that you will lose unsaved data. Press cancel, Save the Position  and go to Actions > View Position Class again.

Note about the Full-Time Faculty Positions section:



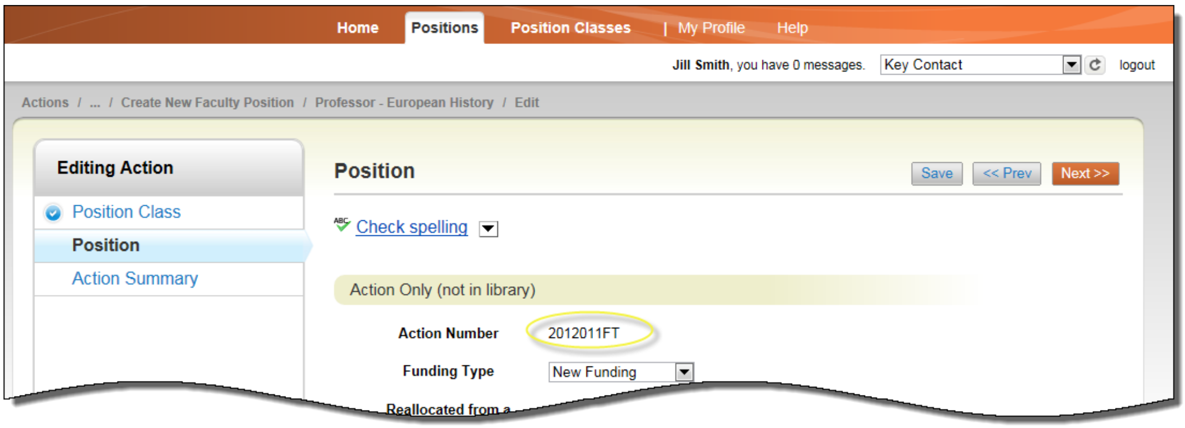
A left-hand menu bar appears at this point. It is useful for navigation purposes and provides information about the contents of this Form.

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 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.

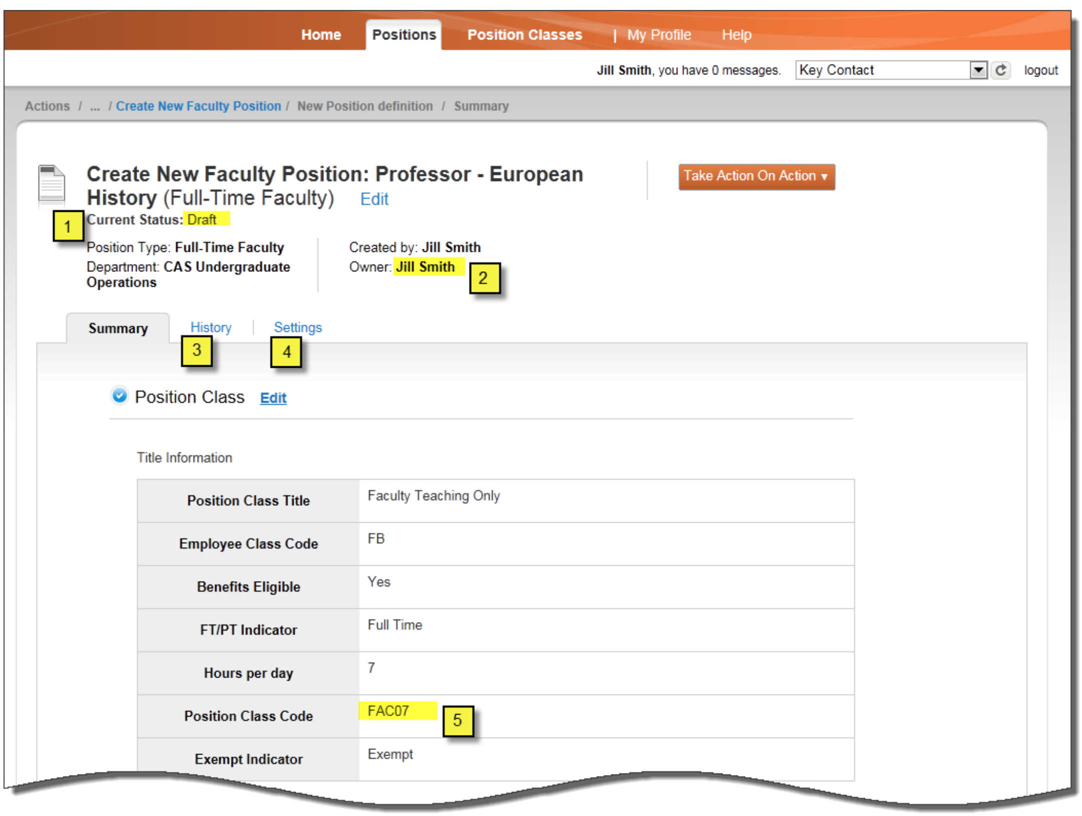


Position Details Form	
Field	**Notation about the Field**
Action Only section (The fields in this section are tied to this action only, not written to the Position Library and not viewable to the applicant or to the employee.)	
Action Number	System auto-assigned.
Funding Type	Select one of the valid values: New Funding or Reallocated
Reallocated from a discontinued position?	Answer this question if the answer to the Funding type (above) is 'Reallocated'. Possible values are Yes or No. • 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

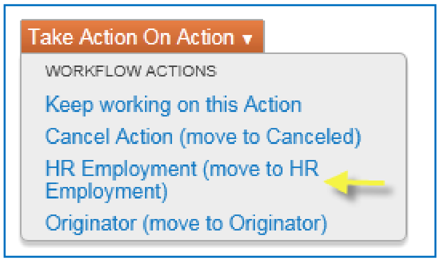
Position Funding Information Section	
Banner Finance Help link	Links to the Banner Finance Help page to look up Index numbers.
Add Position Funding Entry	Opens a view to 3 fields for Index, Account and percent. If percent is less than 100%, please press the Entry button again to submit additional entries 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.



11. Press the Take Action on Action button

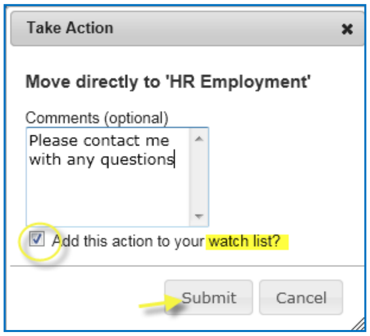


The **Take Action** selection will move this Position action to the next step in the Workflow (see the Flow Charts). Four choices are:

- **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.

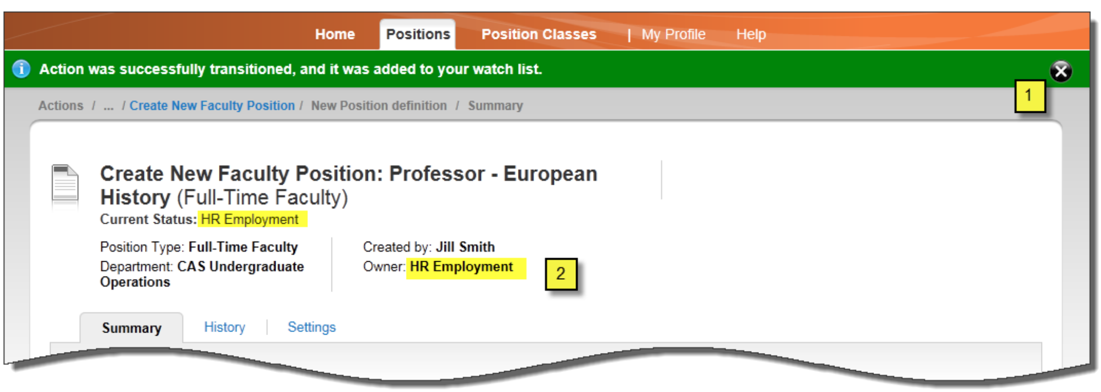


The Take Action window:

- 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.

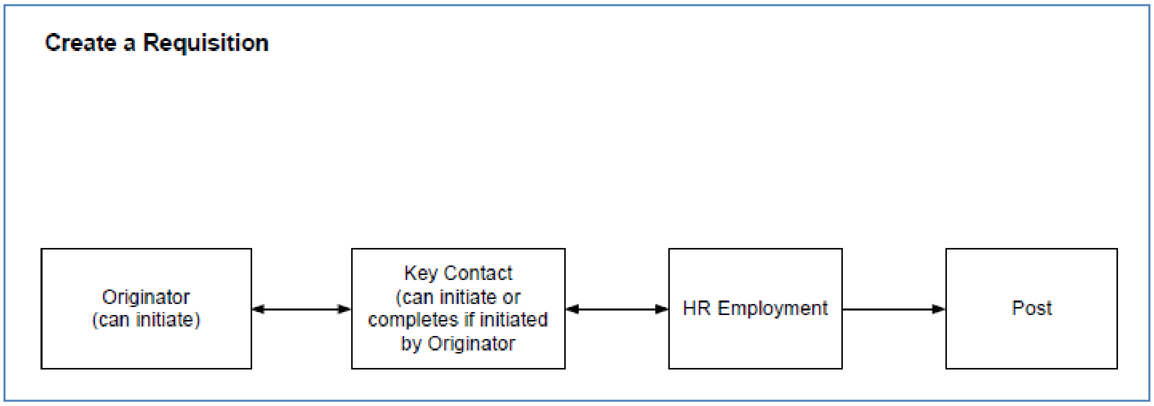


<u>What happens next?</u> HR/Employment will review and either send back for any corrective action or simply create the Position in Banner. This Position can be used to create the requisition or selected when you initiate the Hiring Proposal.

Requisitions and Postings

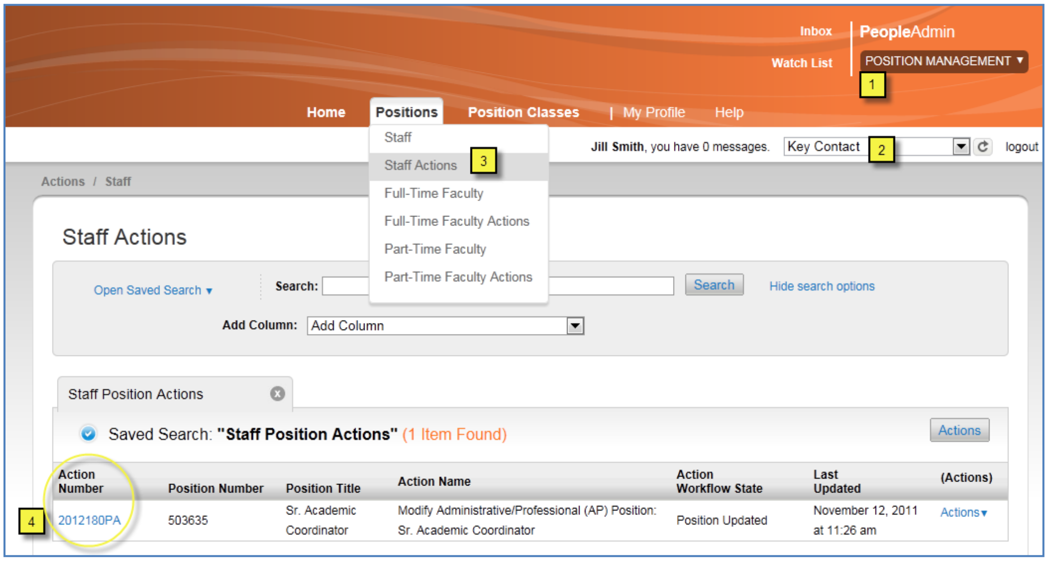
Staff

Create Staff Requisition

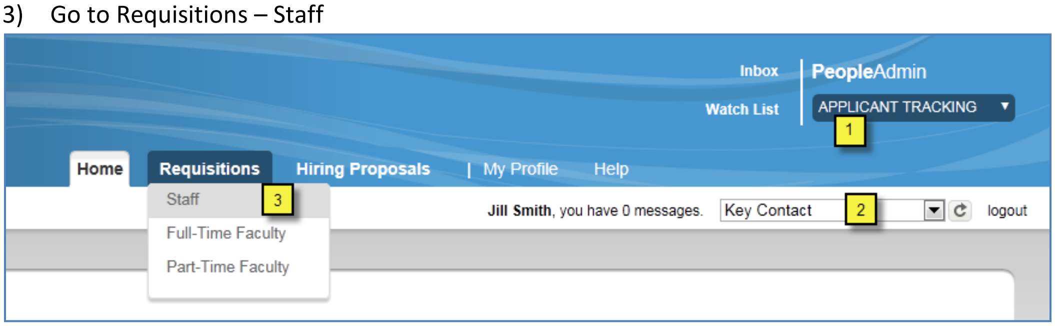


Steps to Create a Staff Requisition

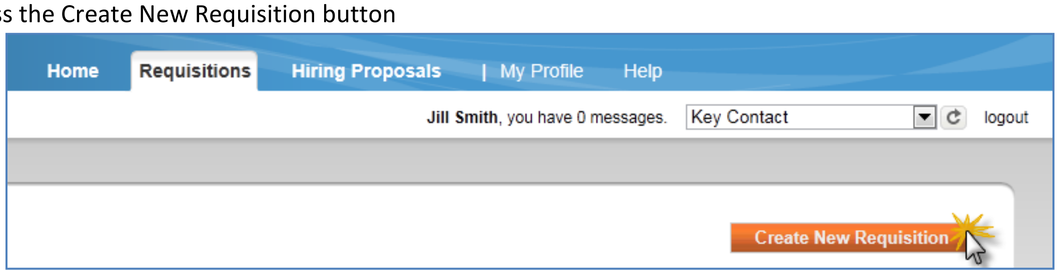
1. Obtain the **Action #** of the approved Position on which the new Requisition will be based. It will appear in the email you received (notification that the Position is approved), or you may look it up in PeopleAdmin:
   1) Go to Positions Module
   2) Change role to Originator or a Key Contact.
   3) From the Positions tab, select Staff Actions
   4) Note the Action # on the list of Staff Actions, far left column.



2. To Create a Requisition:
   1) Switch to the Applicant Tracking module
   2) Select your role.
   3) Go to Requisitions – Staff

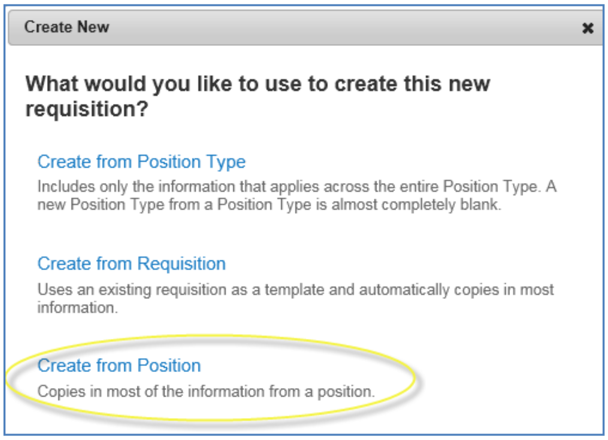


3. Press the Create New Requisition button

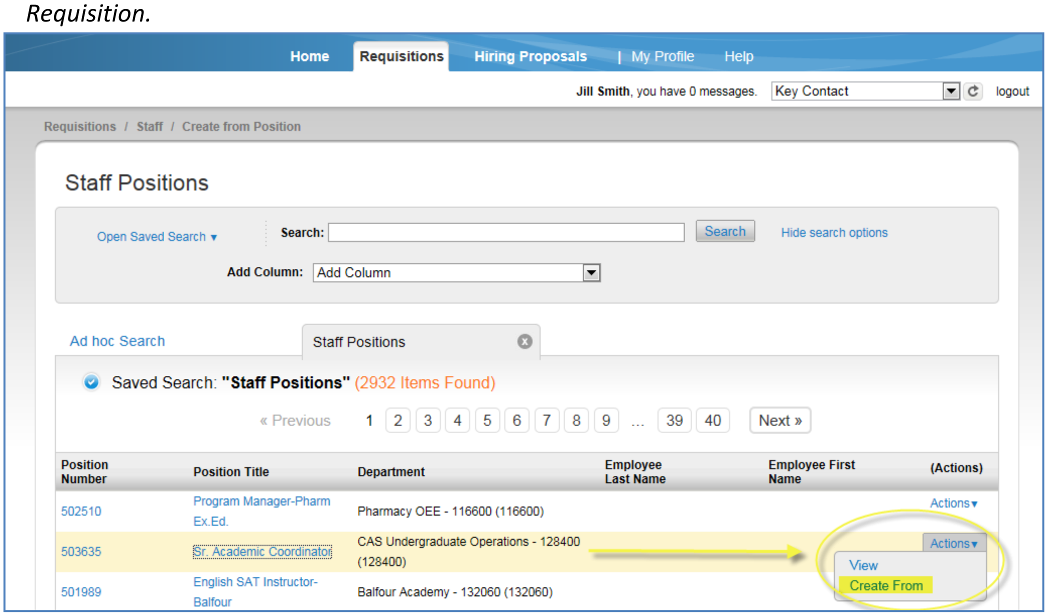


The following three options are provided for you next.

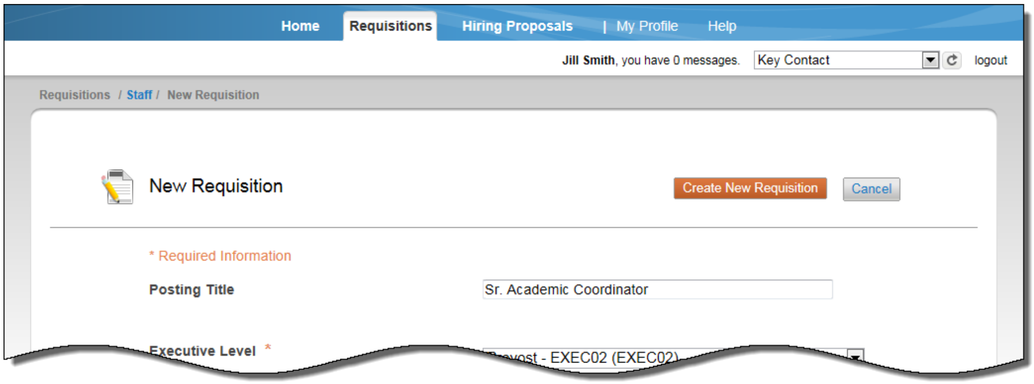
i. Create from Position Type – very rarely used.
ii. Create from Requisition – used when another Requisition is attached to the Position to be filled.
iii. **Create from Position** – this is recommended for most Requisitions



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 <u>before</u> you can use this Position to create a Requisition.*



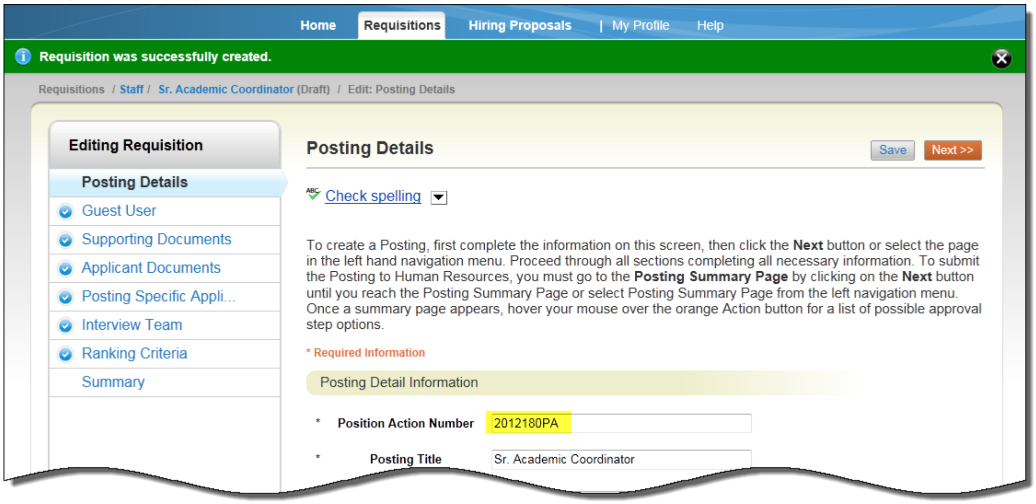
6. The New Requisition Form appears next.



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.

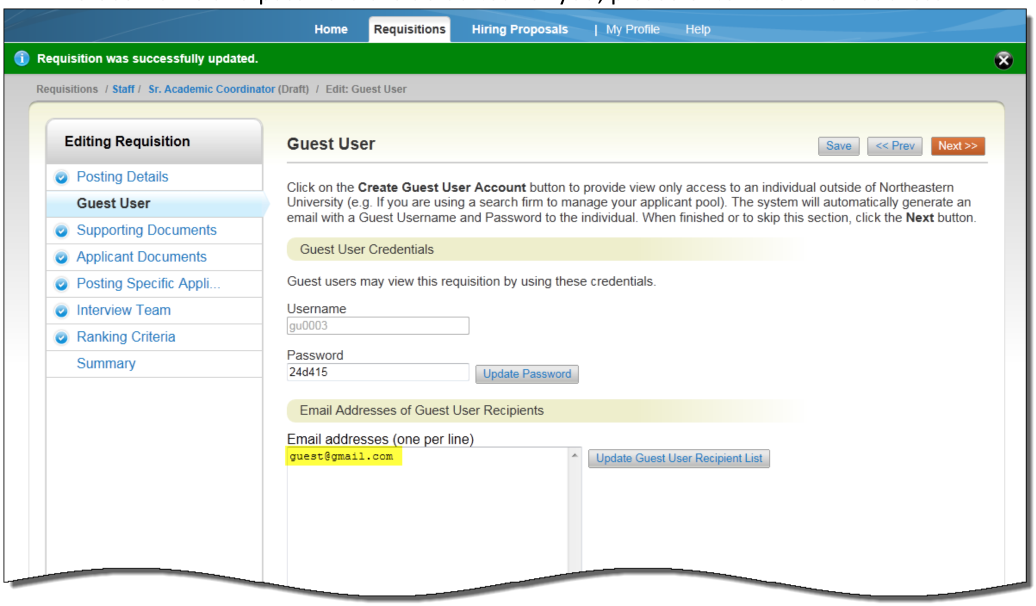


Posting Details Form	
Field	**Notation about the Field**
Posting Detail Information section	
Position Action Number	Required field: Mentioned in Step 1 of this section.
Posting Title	Required field: This is the Title that will appear to applicants, in the posting. It is defaulted from the Position; you can change it here. (Changing it here will only impact the Posting, not the Req or the Position)
Division/College (Posting)	These fields will be displayed on the Posting
Interdisciplinary Division/College	
Full/Part Time	Defaulted from Position; cannot edit
Benefits Eligible	
Grade	
Hours per Day	
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	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 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 not be visible 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, INSIDEHIGHERED.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 not visible to applicants on the posting.

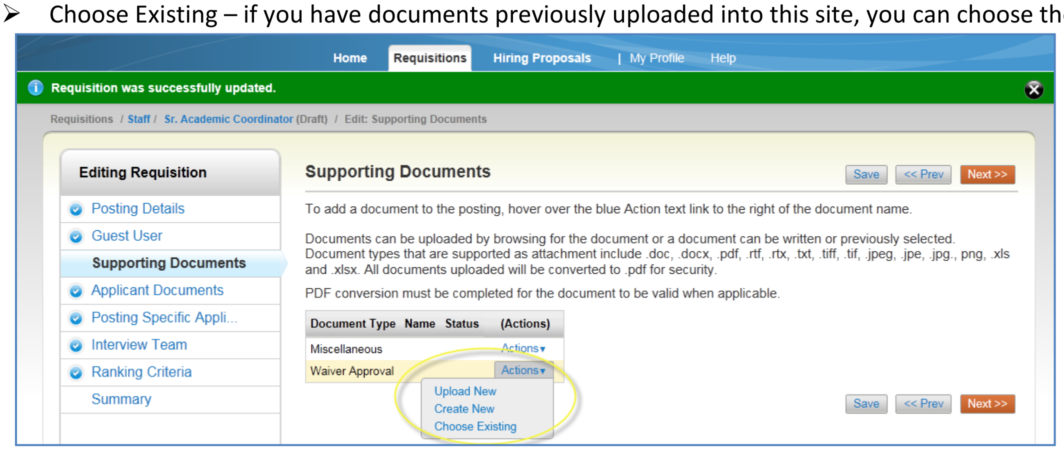
9. Press Next >>

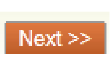
10. Guest User page: Press the Create Guest User Account to provide a view-only access to this requisition, i.e., a Search Firm.   This individual will not be able to leave comments in the system or rank applicants.
    - ➢ The Username and password are defaulted for you; please enter the email address.



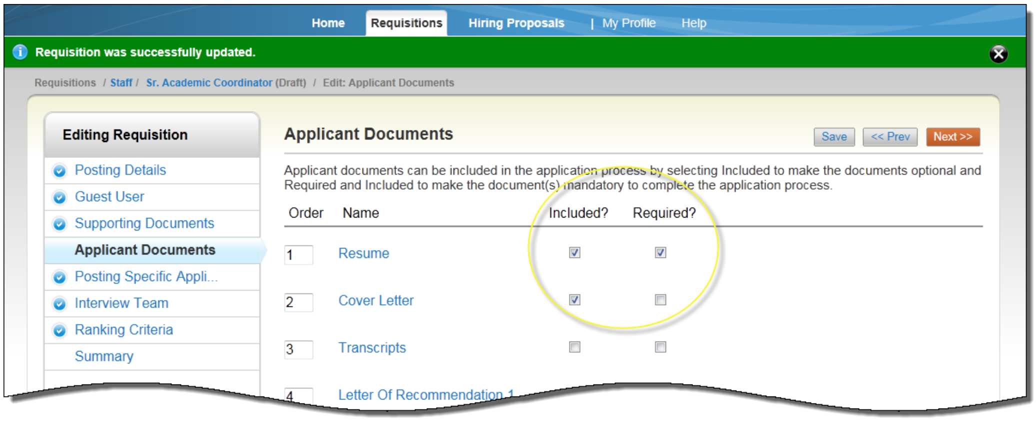
11. Press 

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 an 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.



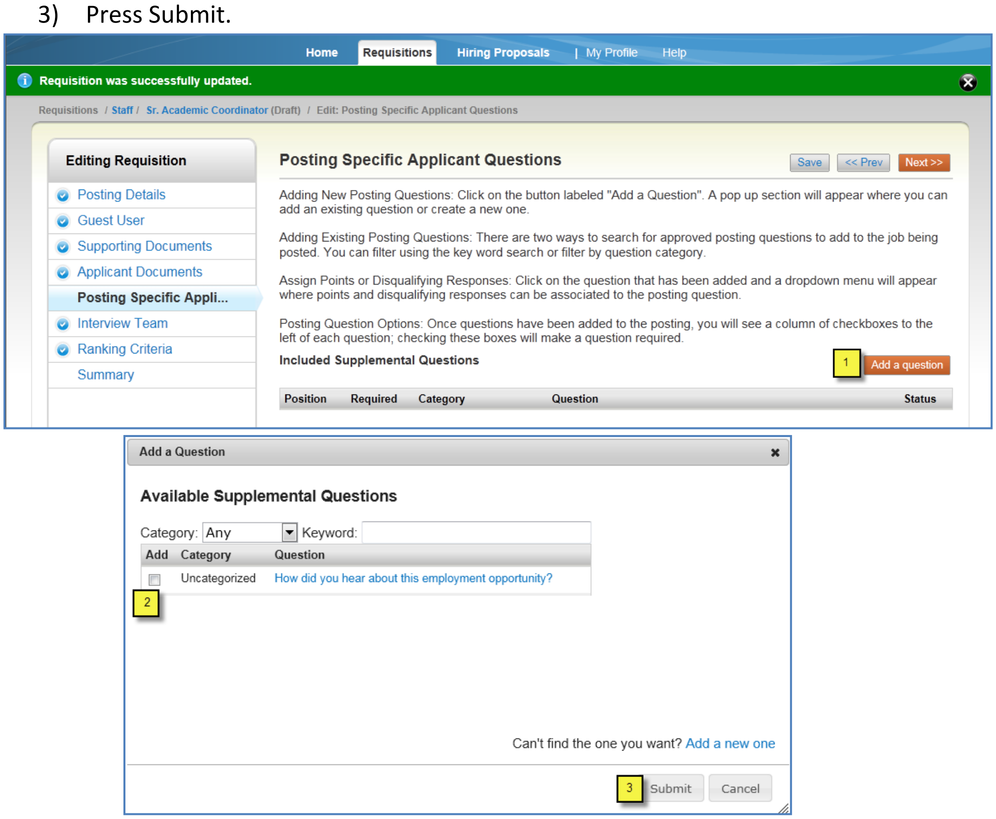
13. Press 

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.

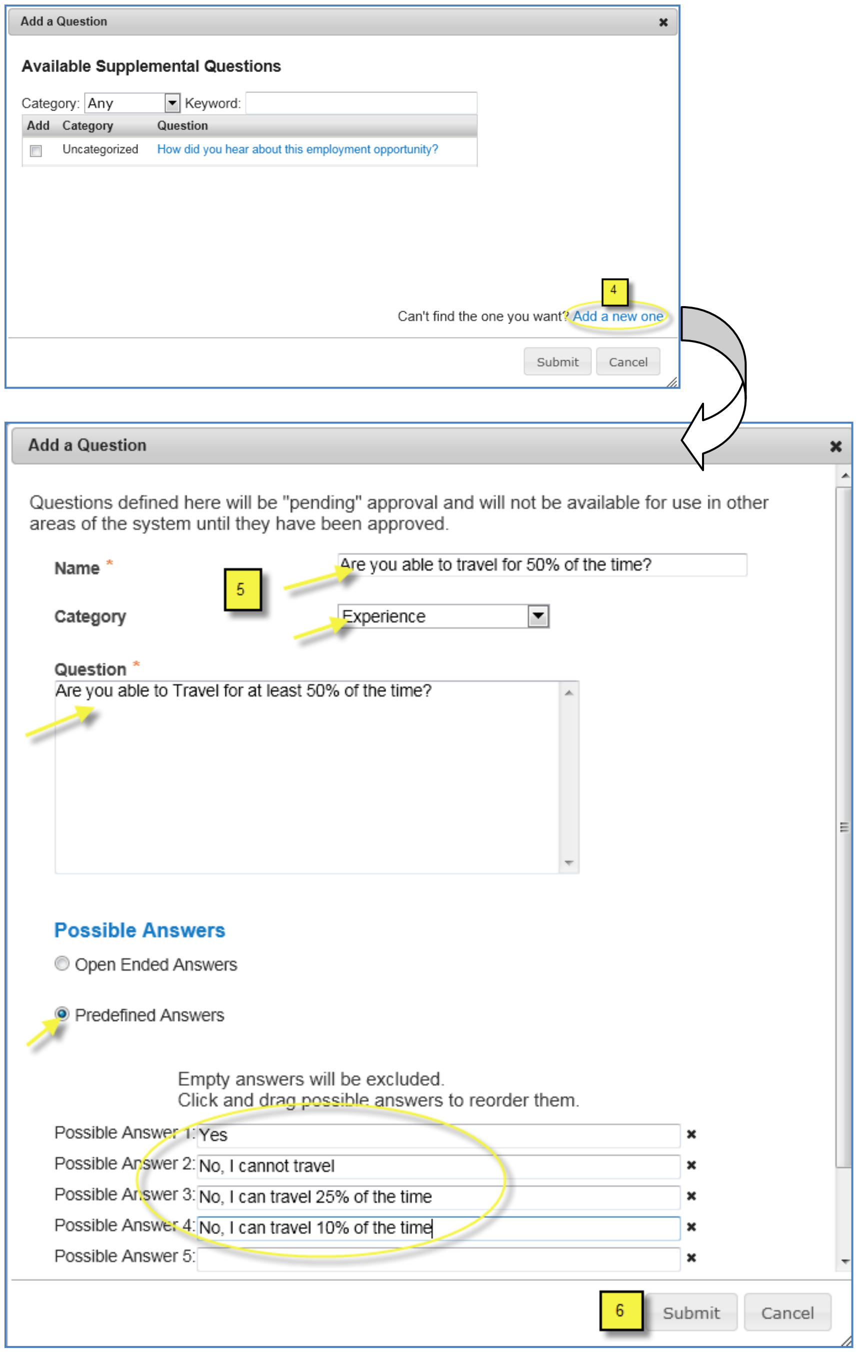


15. Press 

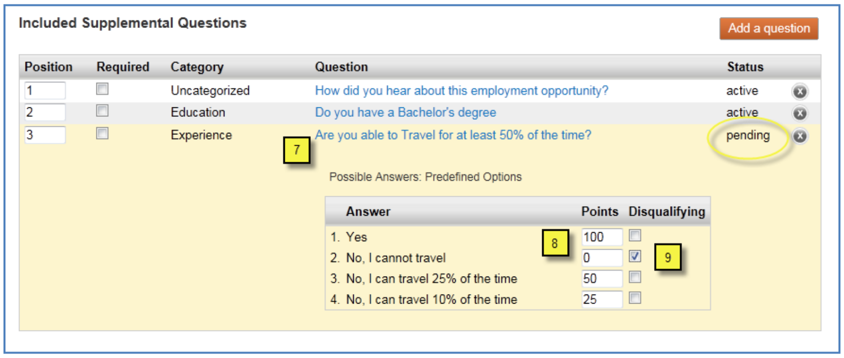
16. Posting Specific Applicant Questions: In this section, you may set up questions and answer choices that applicants will fill in during the application process. Answers can have ratings associated with them which may help in evaluating an applicant pool. These are known as "knock out" questions.
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

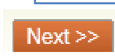


4) If you would like to write and add a new question, press the Add a new one link. This new question will be automatically routed to Human Resources and upon their approval; this question will be displayed on the posting.
5) Fill in the fields indicated
6) Press Submit

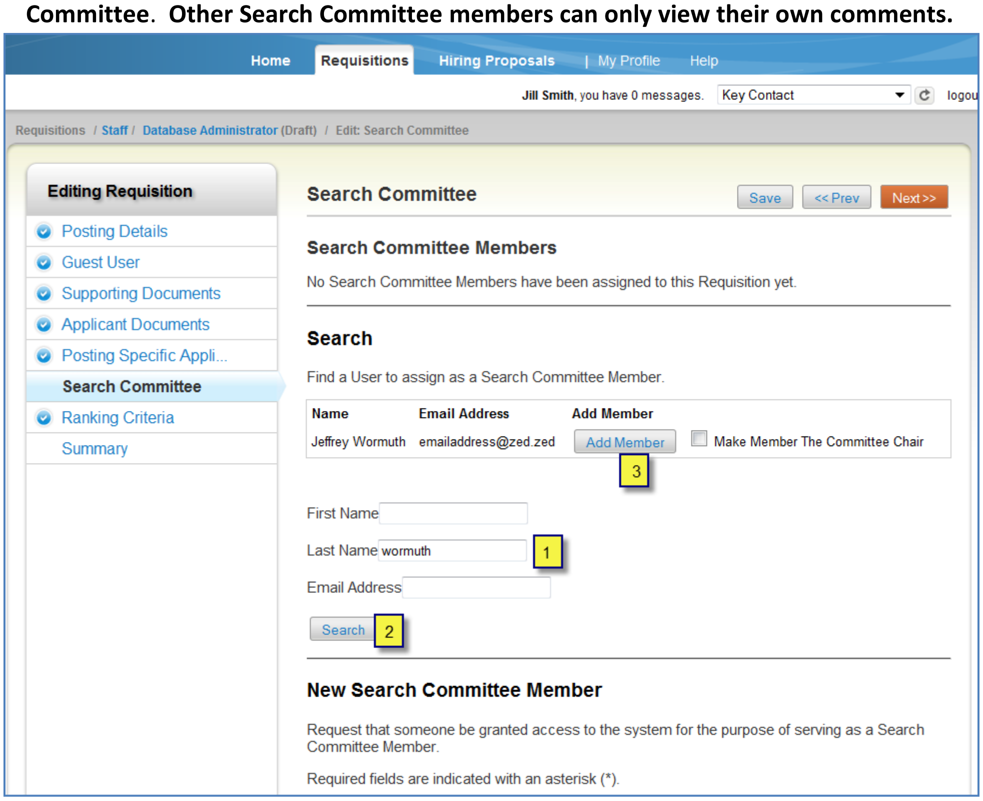


7) Next, click on the question name.
8) Assign points to each answer
9) Choose answer that is automatically disqualifying. (On Step 8 of this section, you have access to a field which allows you to display a 'Fail' message to the applicant in the event this answer is chosen).

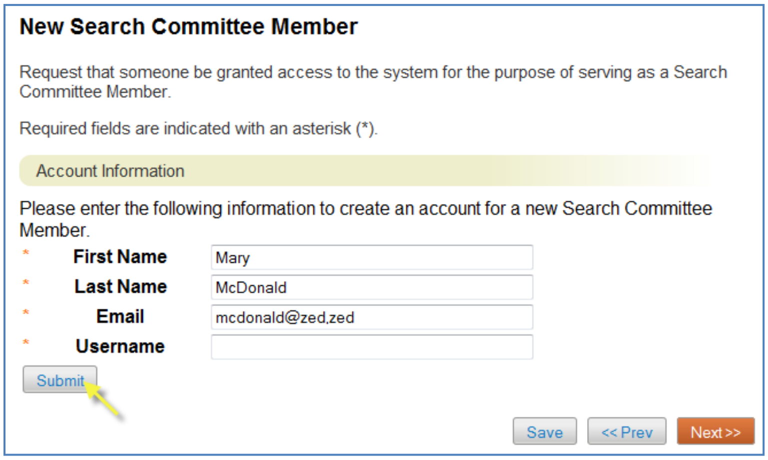


17. Press 

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.**



- 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.

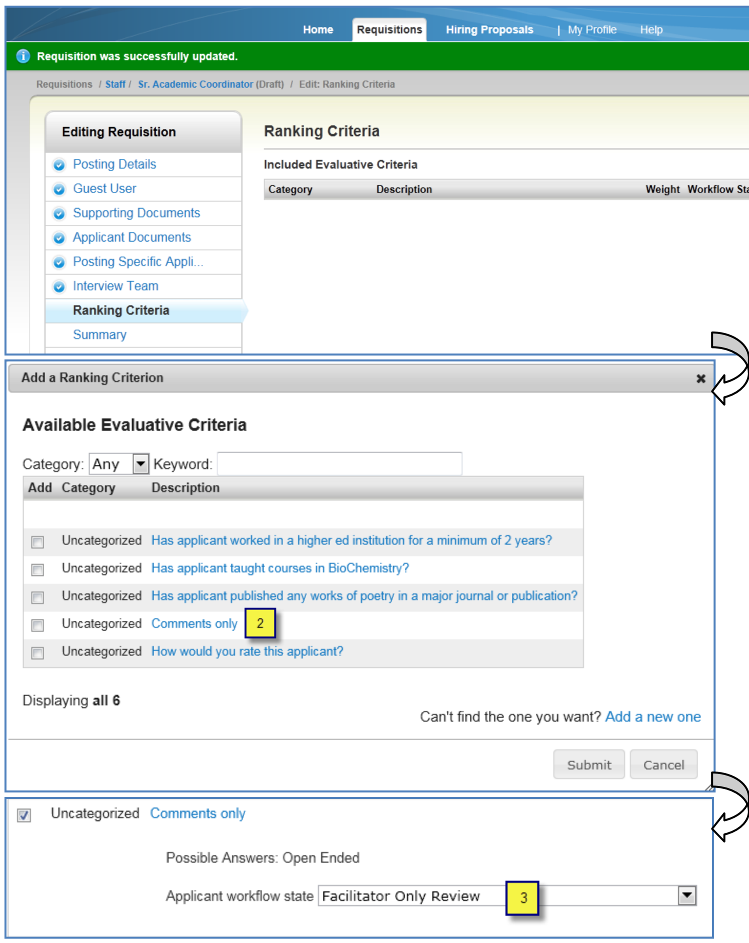
* First Name	Mary
* Last Name	McDonald
* Email	mcdonald@zed.zed
* Username	

Submit

Save << Prev Next >>

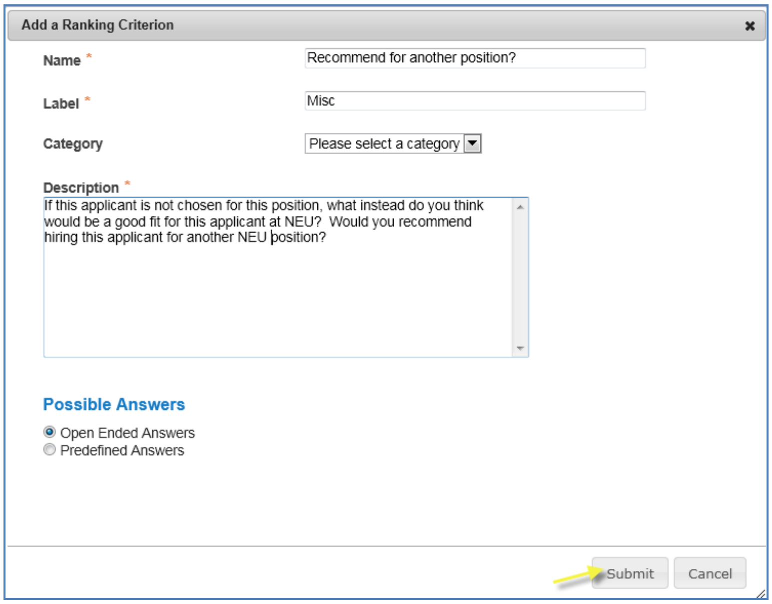
19. Press 

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.

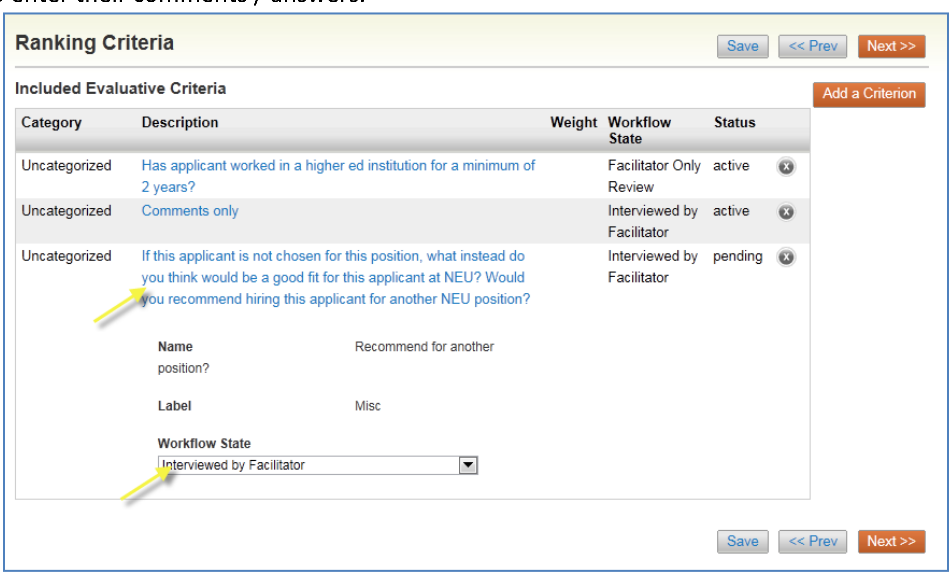


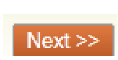
To add a new Question:

- 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



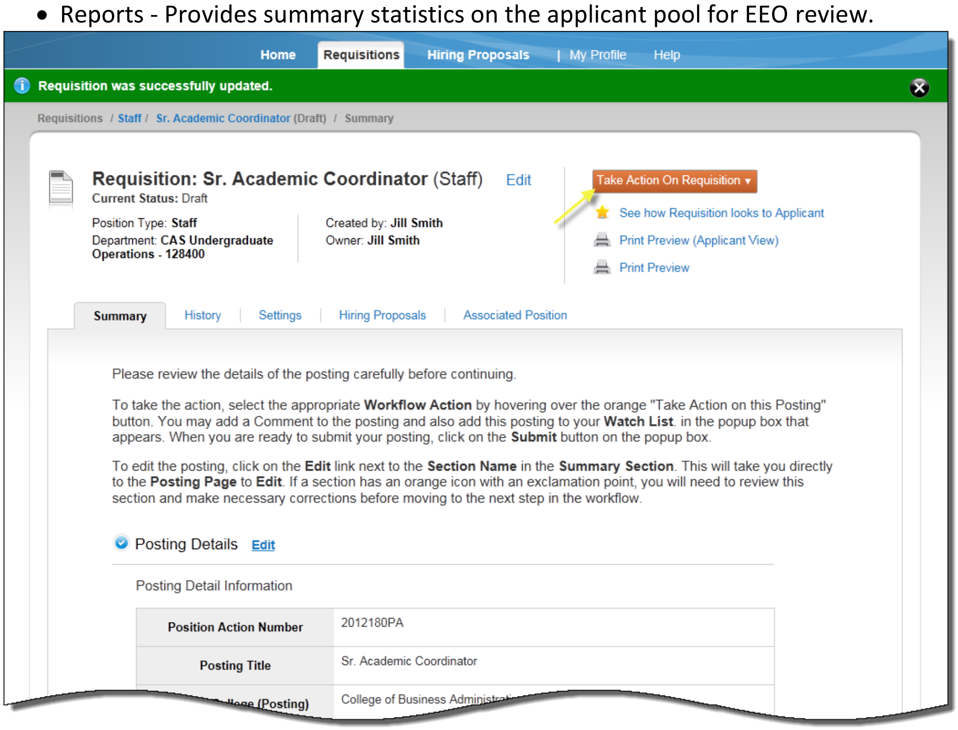
- Press the question link and designate the workflow state at which time the search committee members will be able to enter their comments / answers.



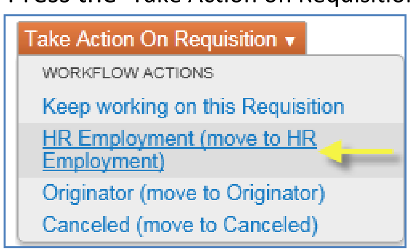
21. Press 

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.



22. Press the 'Take Action on Requisition' button

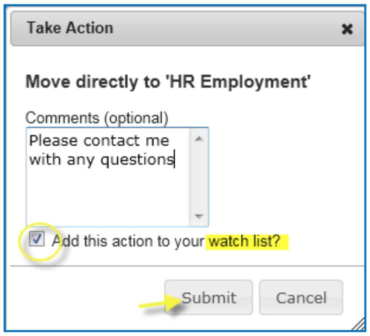


The **Take Action** selection will move this Requisition to the next step in the Workflow (see the Flow Charts). Four choices are:

- **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.
- **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.

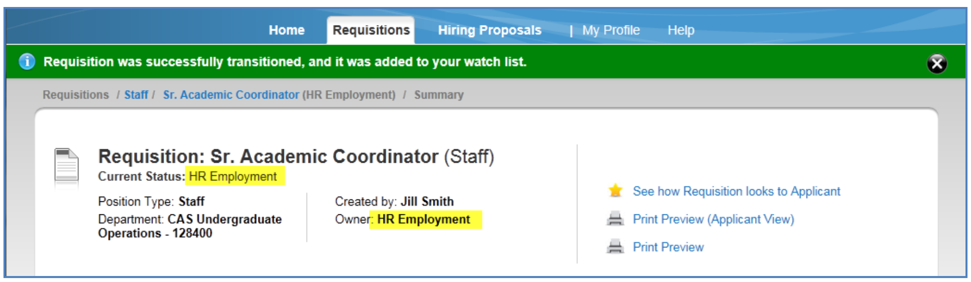


The Take Action window:

- 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.

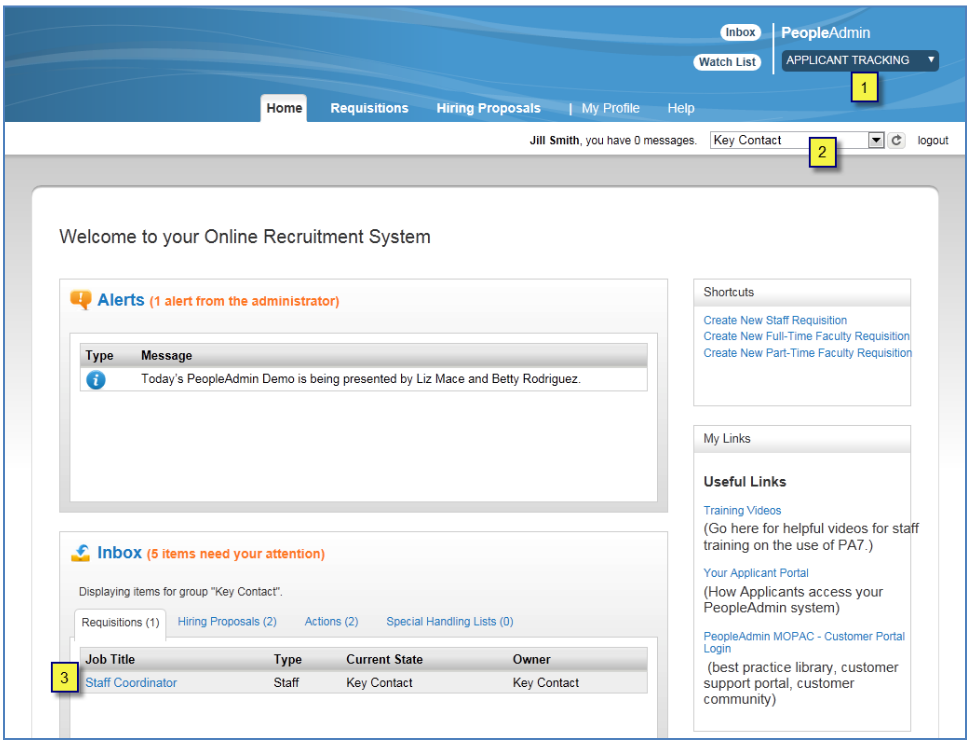


Review / Edit / Approve Staff Posting

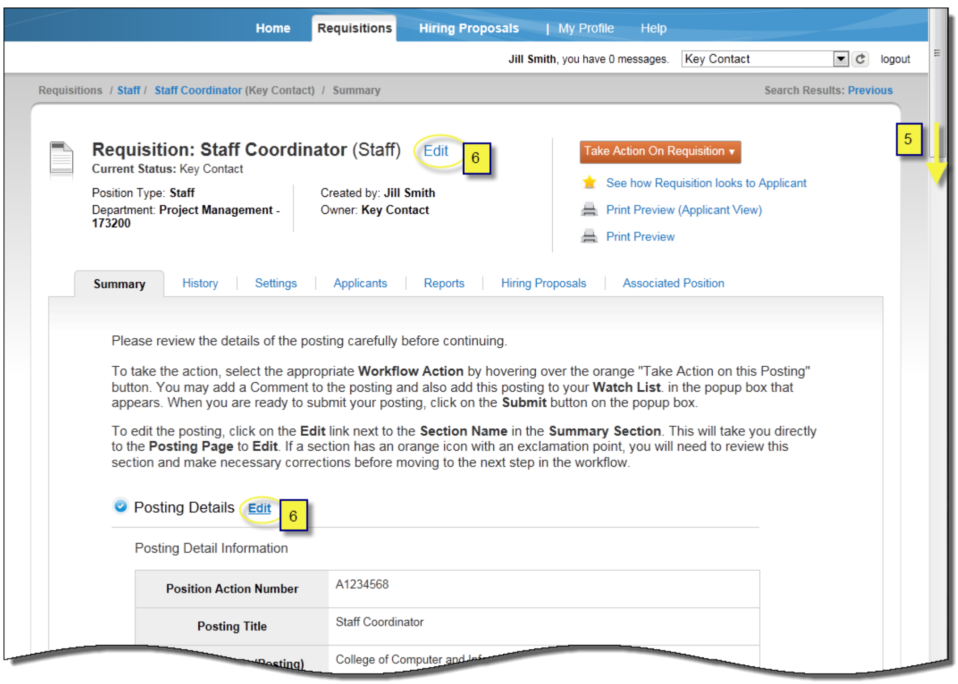
A Key Contact will review a Posting when an Originator has created one and has moved it along the workflow to the Key Contact. HR/Employment will review and approve a posting that has been moved along in the workflow from the Key Contact.

Steps to Review/Edit/Approve a Staff Posting

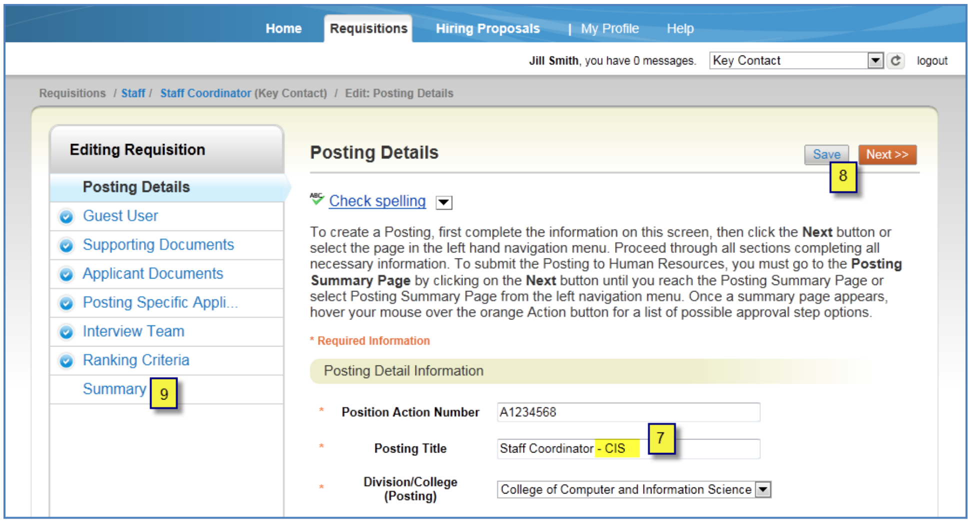
1. Go to Applicant Tracking Module
2. Change role to Key Contact.
3. From the Home page, go to the Inbox and click on the Requisition Title.



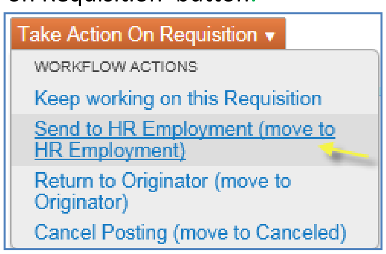
4. The Summary page appears next.
   - Tabs on this page:
     - History – This displays all the historical transaction (and comments) of the Requisition, as it moves through the Workflow.
     - Settings – This is where you can view the Organization fields
     - Applicants – Those who apply to this 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



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.



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

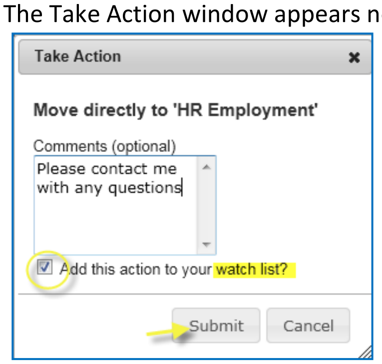


The **Take Action** selection will move this Requisition to the next step in the Workflow (see the Flow Charts). Four choices are:

- **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.

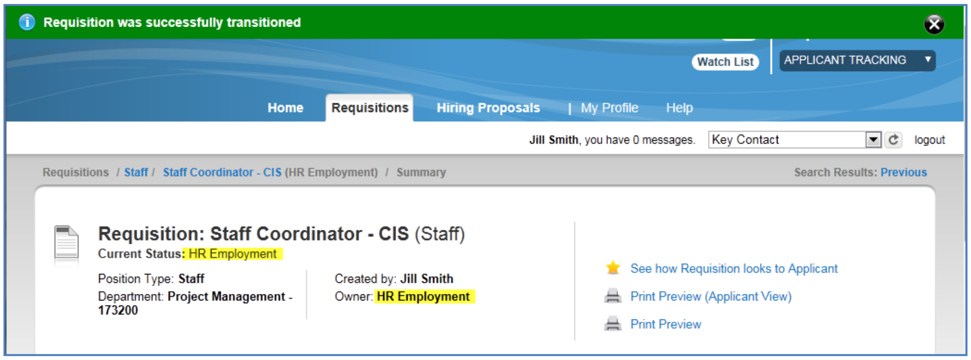


The Take Action window:

- 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.

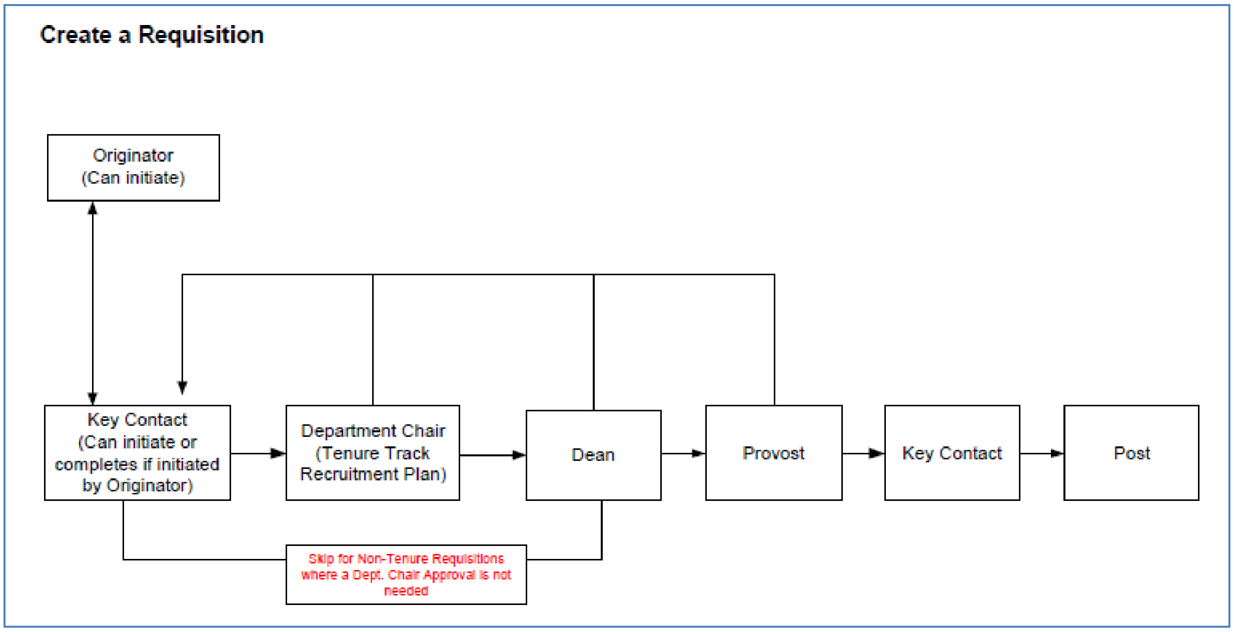
13. The next page shows the results of your submission:

- 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.



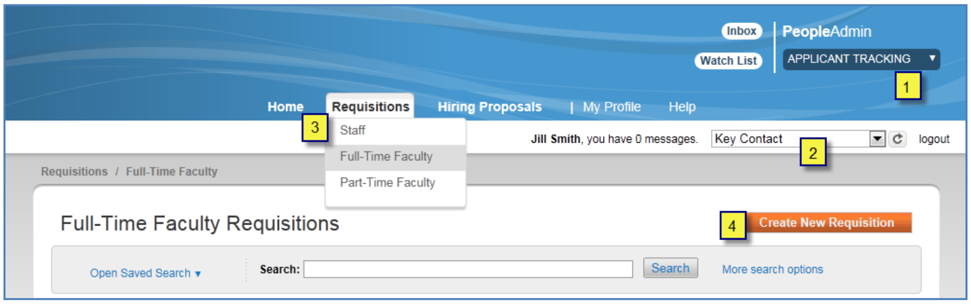
Faculty

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



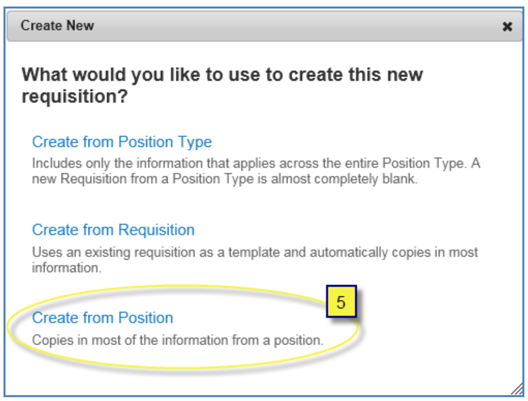
Steps to Create a Faculty Requisition

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



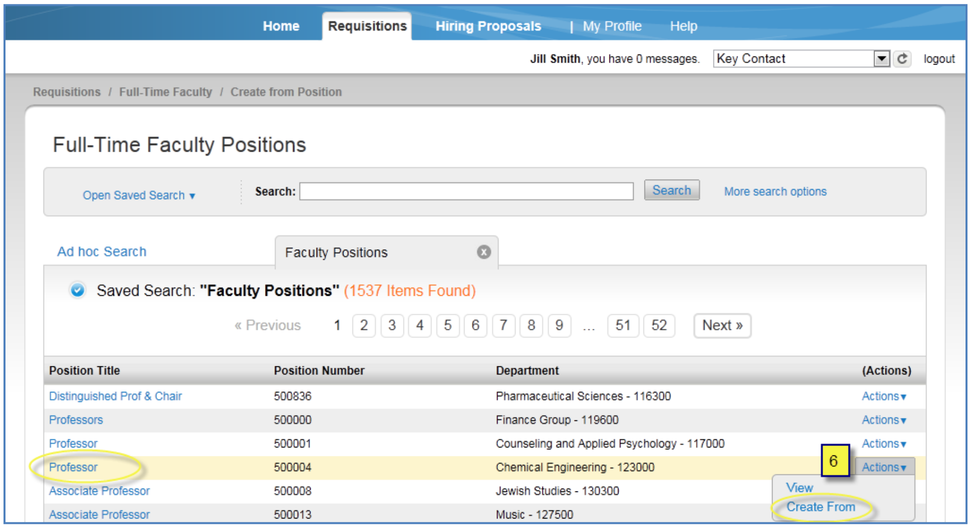
5. Select Create from Position

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

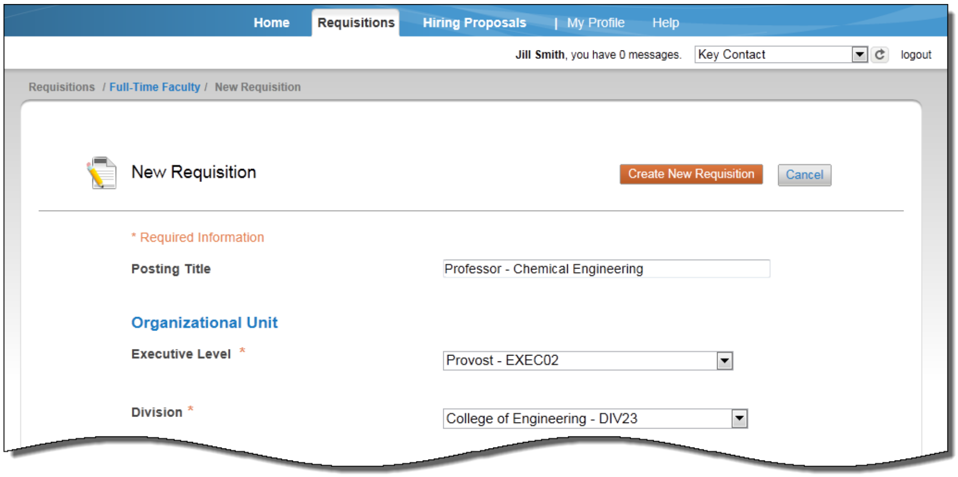
i. *Note: You can have only 1 open Requisition tied to a single Position at one time. If you plan on using a Requisition to hire more than one person, you would change the Position number that is defaulted on the Hiring Proposal, to another approved Position.*

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 <u>before</u> you can use this Position to create a Requisition.*

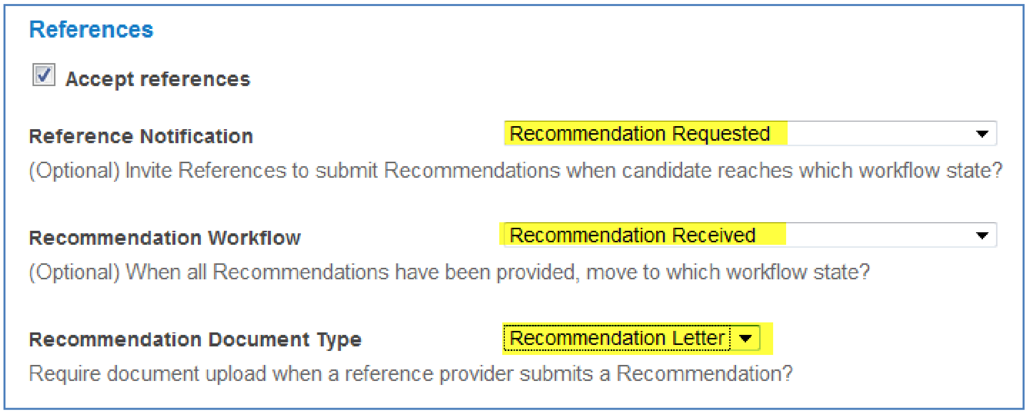


7. The New Requisition Form appears next.



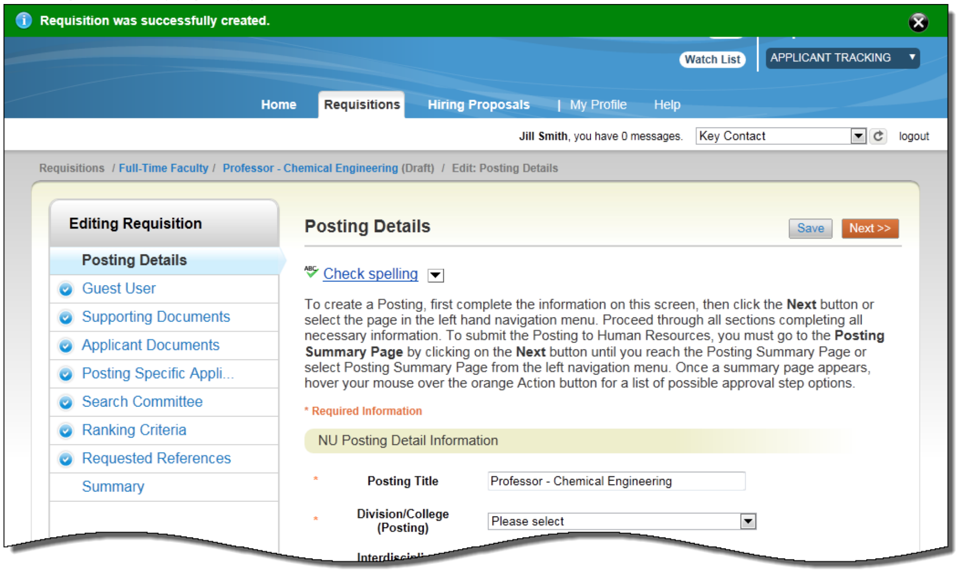
New Requisition Form	
Field	**Notation about the Field**
Posting Title	Defaults from the Position, you can change the Title here.
Organizational Unit Section	
Executive Level	Organization fields default from the Position.
Division	
Department	
Applicant Workflow Section	
Workflow State	Defaults to 'Review 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.



8. Next, press the Create New Requisition button.

9. The Posting Details page appears next.

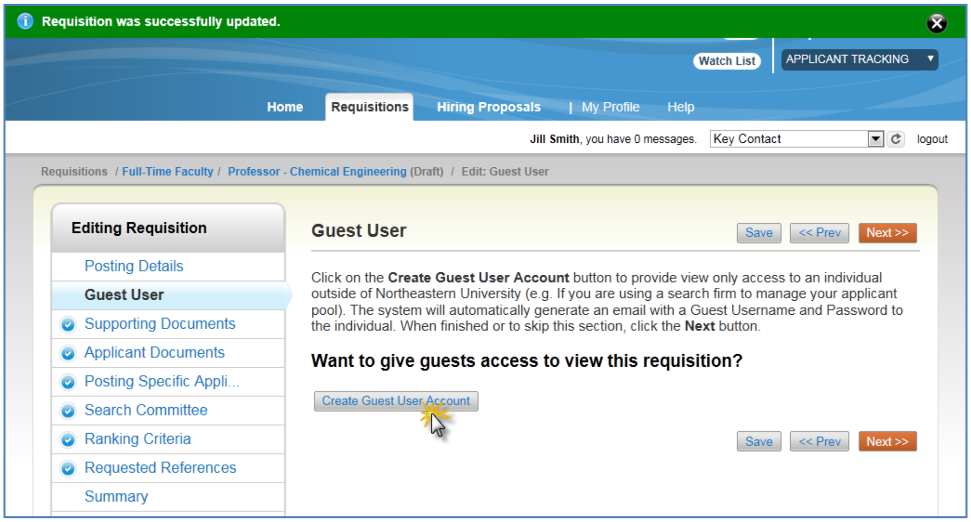


Posting Details Form	
Field	**Notation about the Field**
NU Posting Detail Information section	
Posting Title	Required field: This is the Title that will appear to applicants, in the posting. It is defaulted from the Position; you can change it here. (Changing it here will only impact the Posting, not 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: • 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.

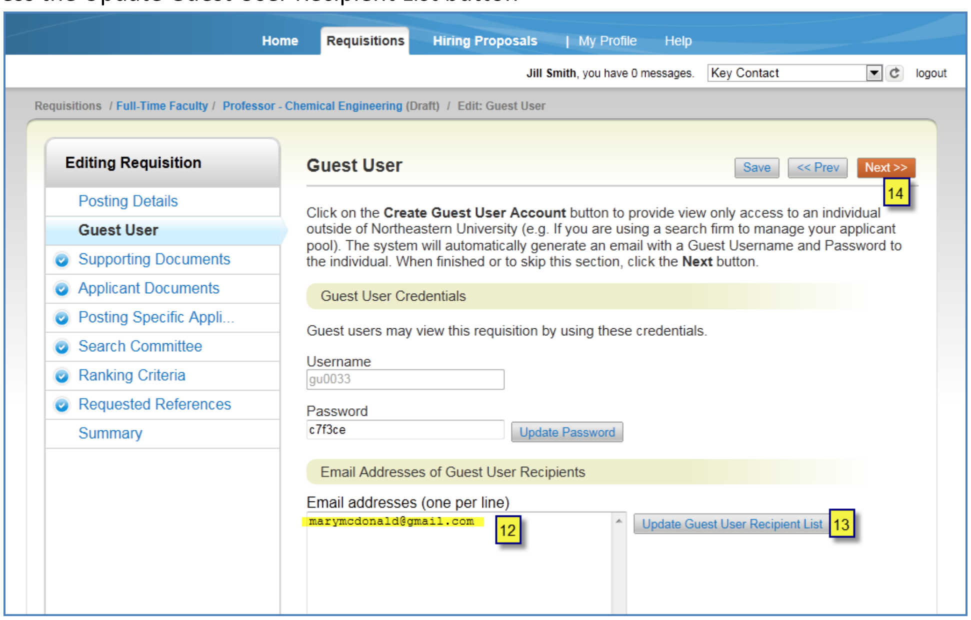
Open until Filled	Check this box if you left the Close date field blank.
Requested Posting Waiver Type	Choices: No Waiver, Full waiver, Partial Waiver, Target of Opportunity. A choice of No Waiver means this Req will be posted.
Pass Message	The default text will appear to applicants once their application 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 not visible 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, woman 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.

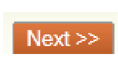
10. Press Next >>

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.

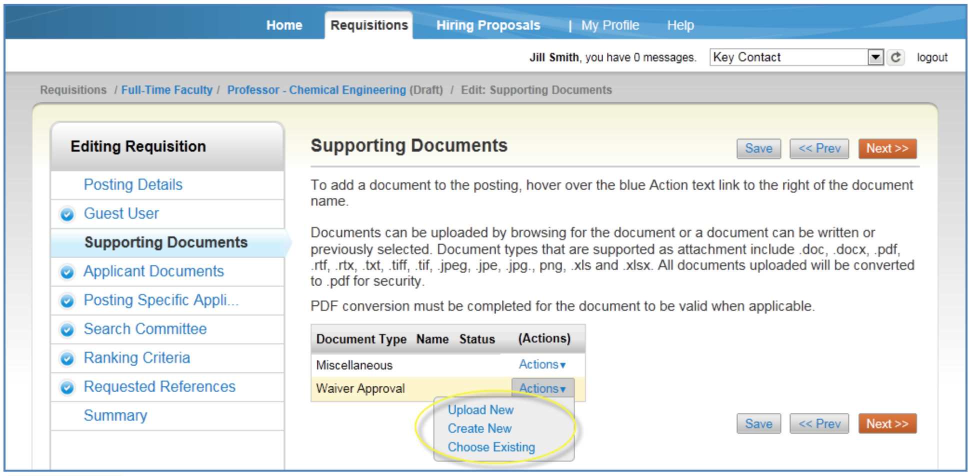


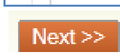
12. The Username and password are defaulted for you; please enter the email address.
13. Press the Update Guest User Recipient List button



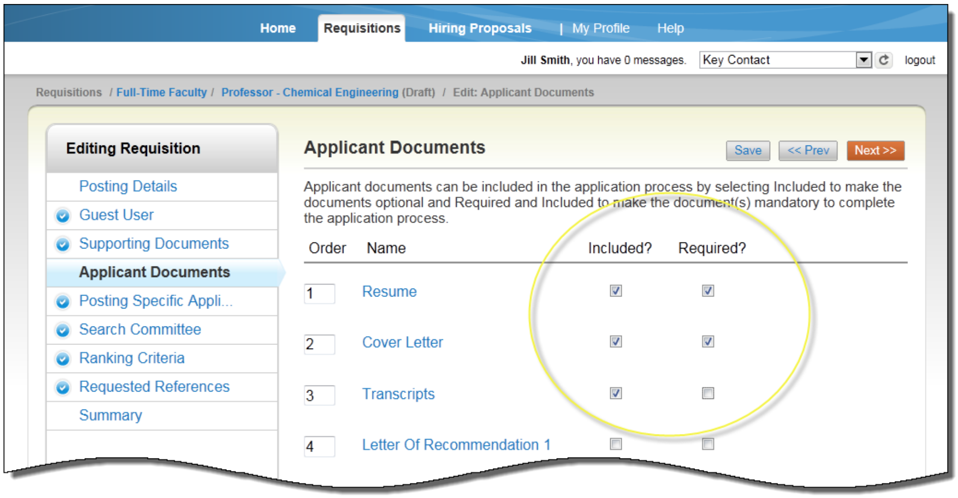
14. Press 

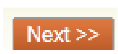
15. Supporting Documents Page: You may attach documents to this Posting (not visible to Applicants). Your choices in adding a document are:
   - Upload New – browse to a file on your computer an upload.
   - Create New – use the online content tool to create a document to be included with this Req.
   - Choose Existing – if you have documents previously uploaded into this site, you can choose them here.



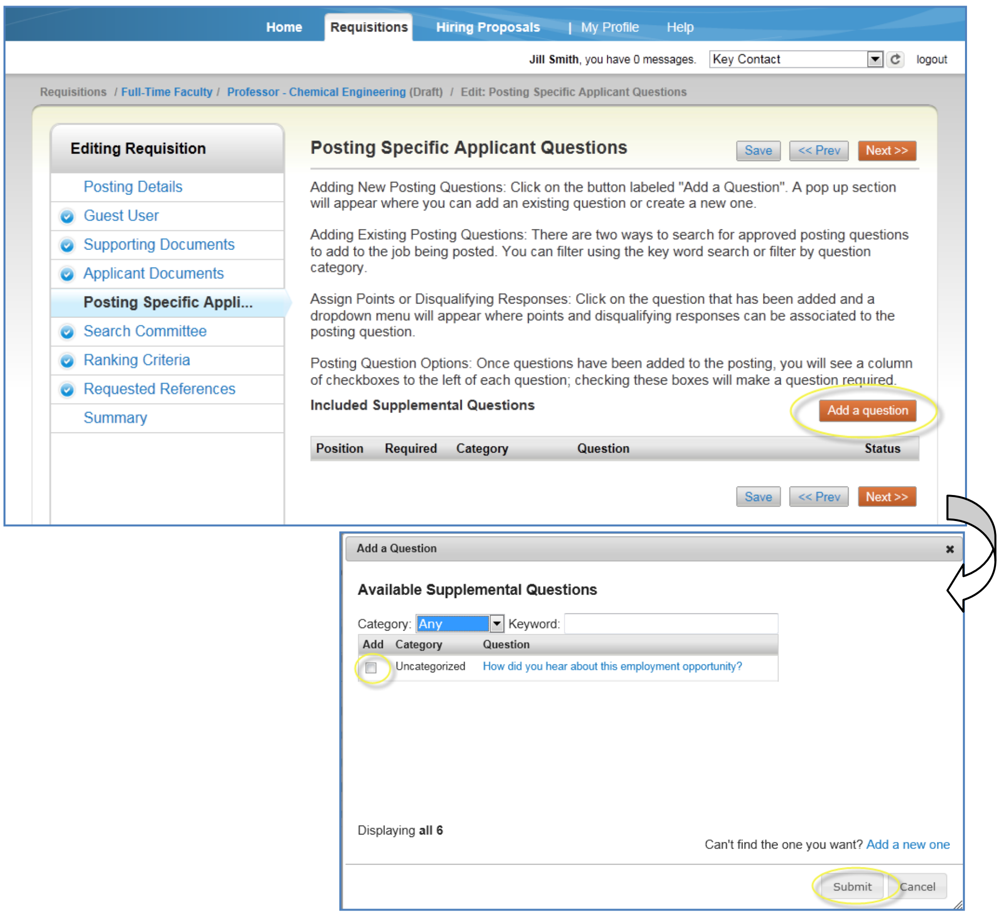
16. Press 

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.

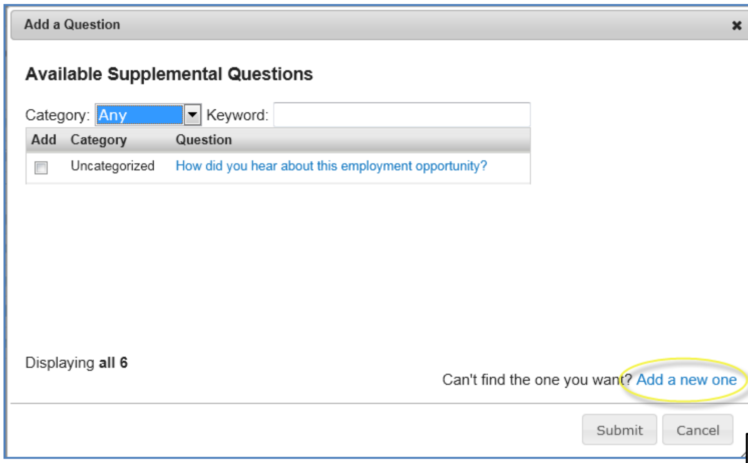


18. Press 

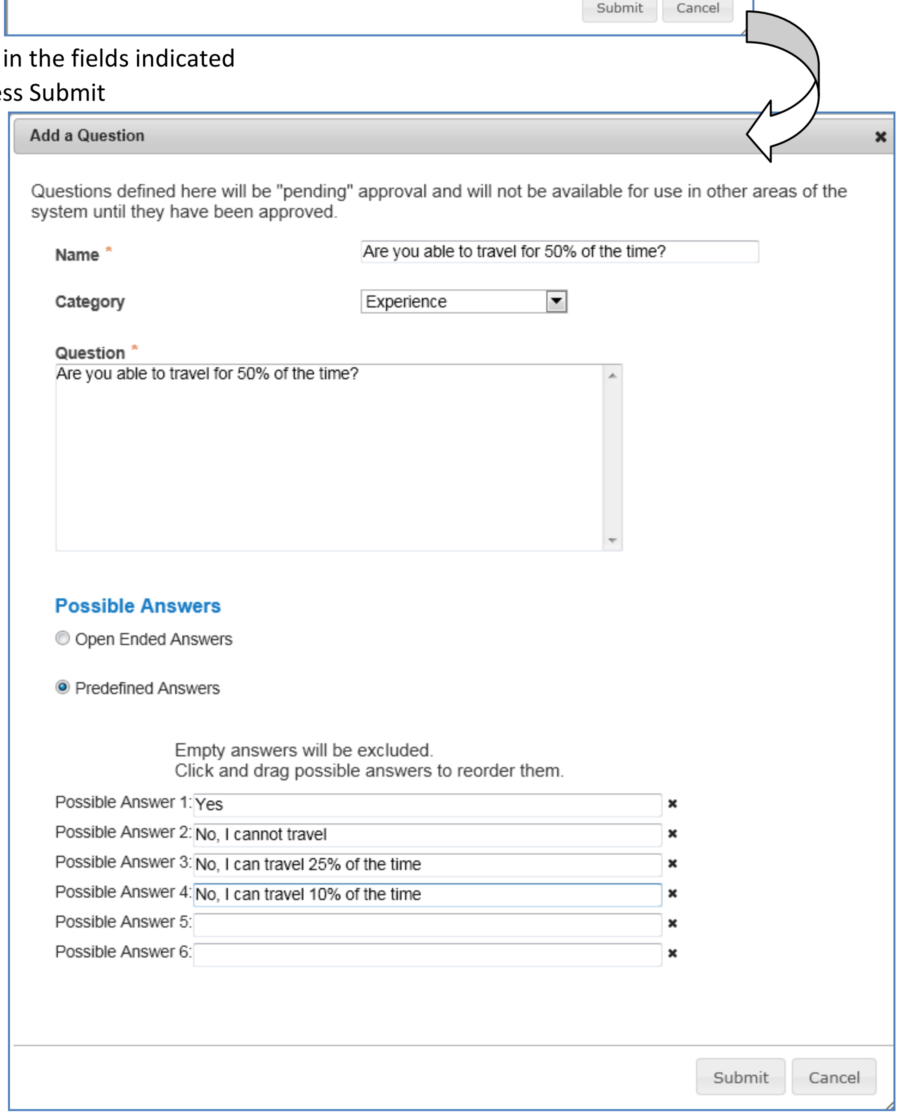
19. Posting Specific Applicant Questions: In this section, you may set up questions and answer choices that applicants will fill in during the application process. Answers can have ratings associated with them which may help in evaluating an applicant pool. These are known as “knock out” questions.
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



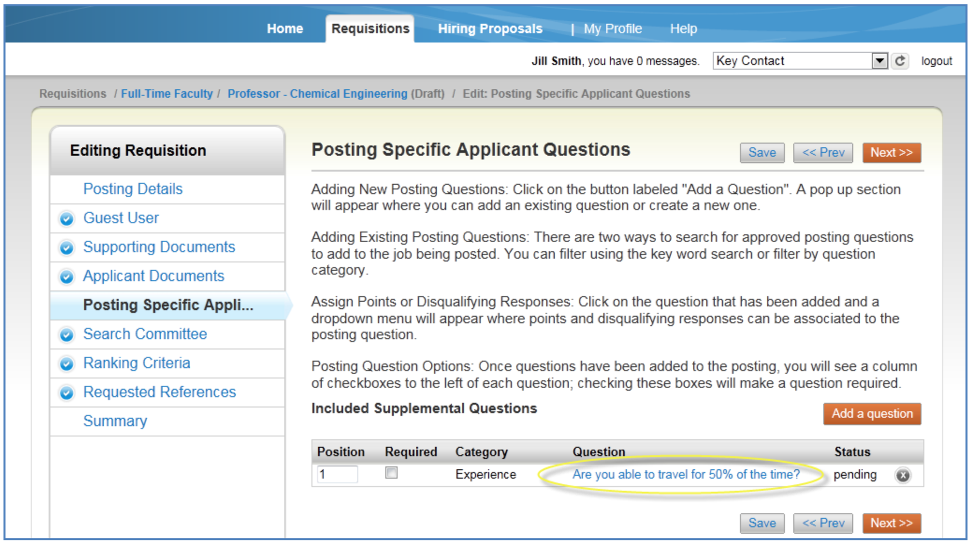
- If you would like to write and add a new question, press the Add a new one link. This new question will be automatically routed to the Provost and upon approval this question will be displayed on the posting.



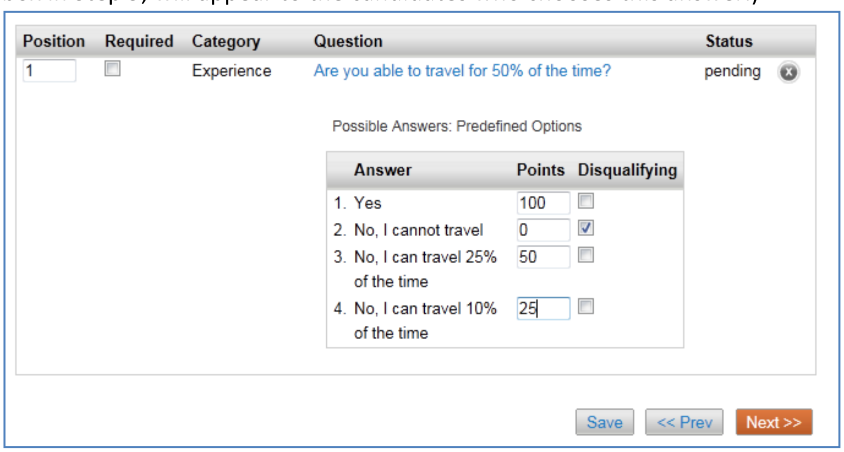
- Fill in the fields indicated
- Press Submit

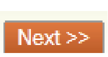


- ➢ Next, click on the question name.

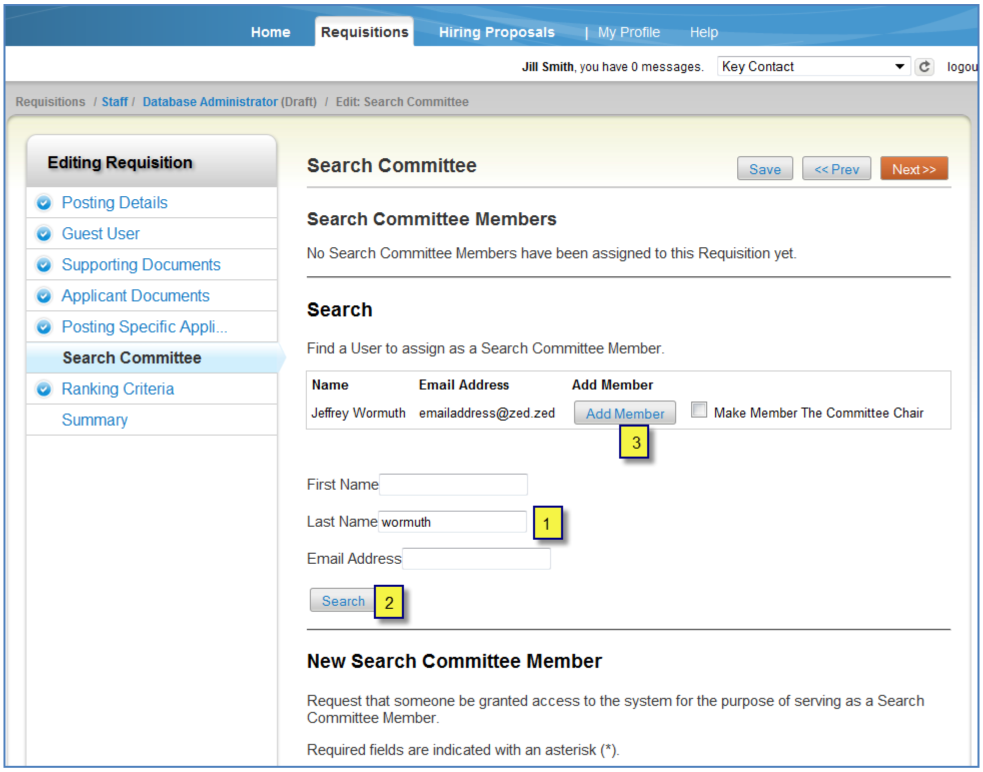


- ➢ Assign points to each answer
- ➢ Choose answer that is automatically disqualifying. (If you choose this, the text in the 'Fail Message' box in Step 9, will appear to the candidates who chooses this answer.)

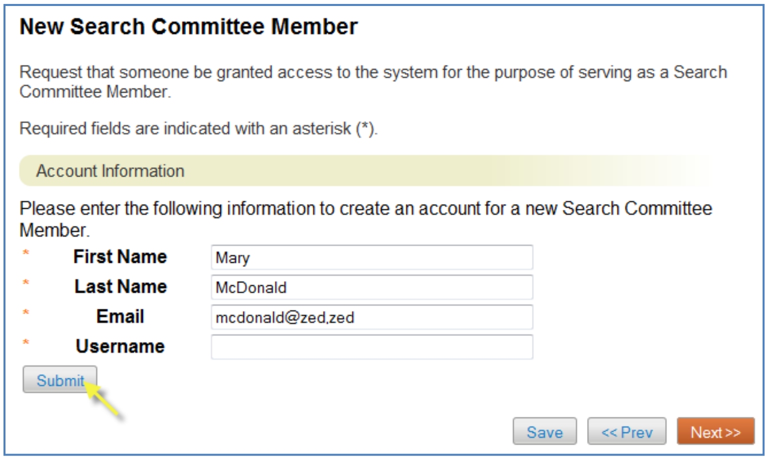


20. Press 

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.**



- 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.

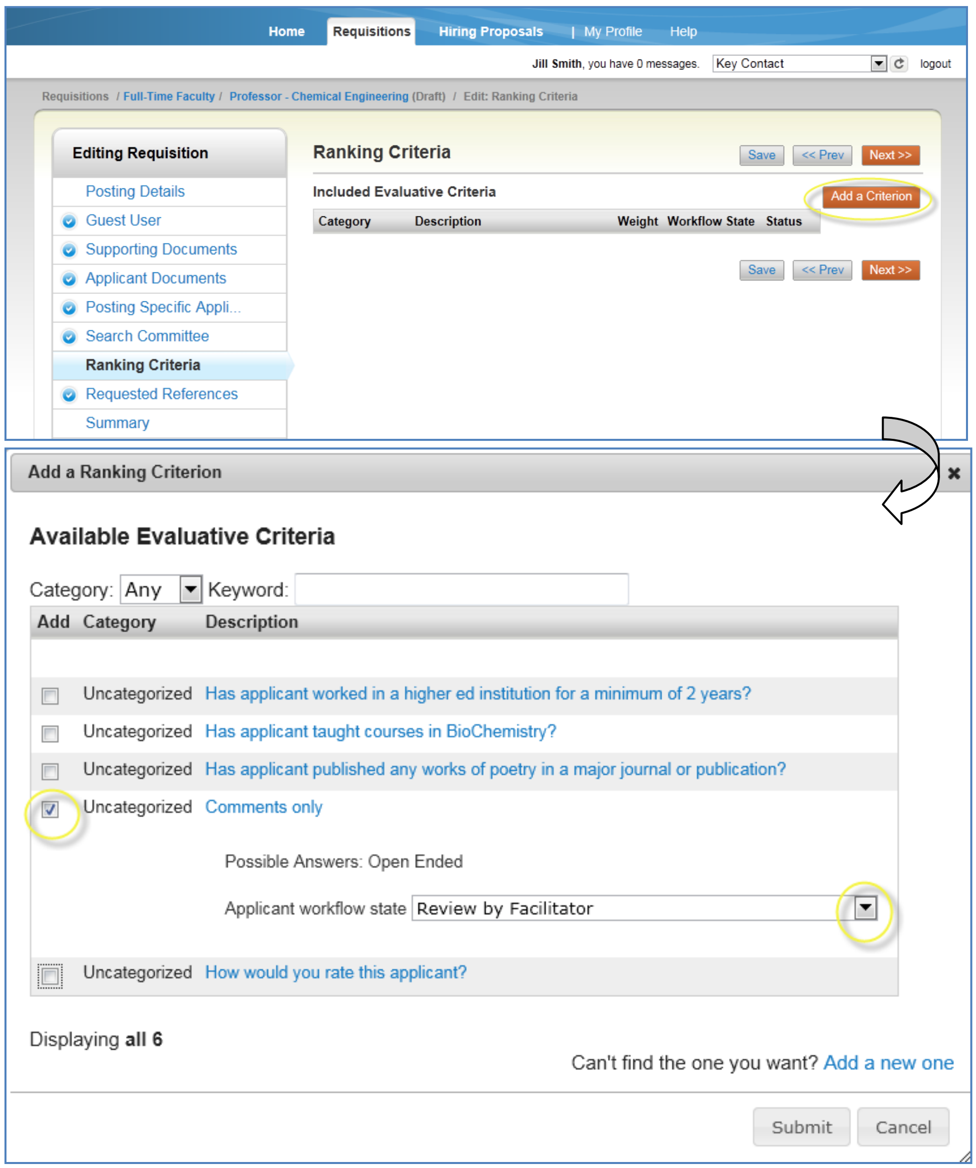
* **First Name**	Mary
* **Last Name**	McDonald
* **Email**	mcdonald@zed,zed
* **Username**	

Submit

Save | << Prev | Next >>

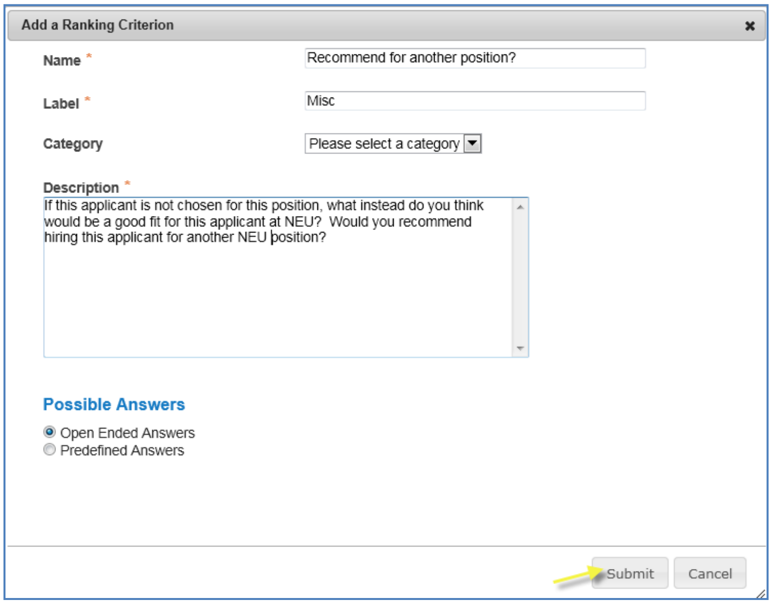
22. Press 

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.

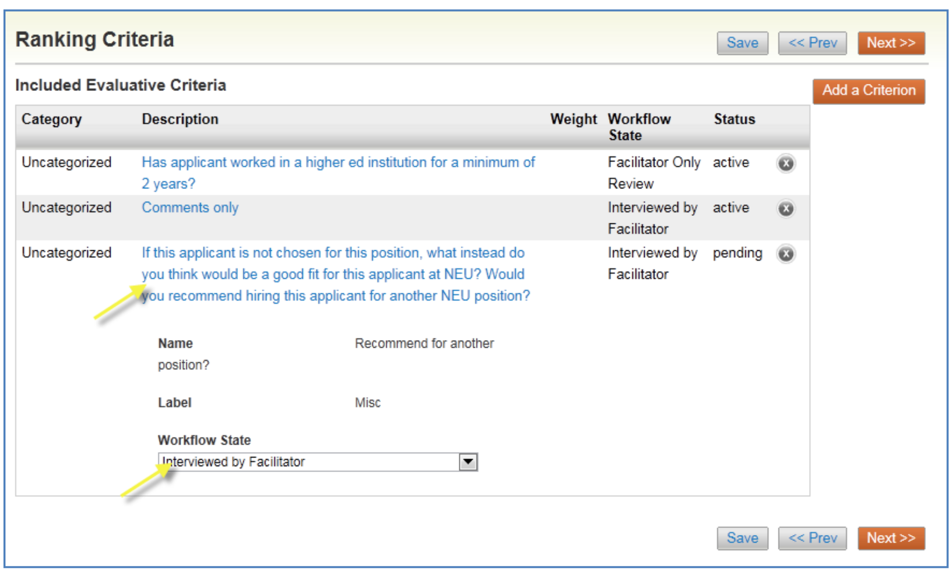


To add a new Question:

- 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

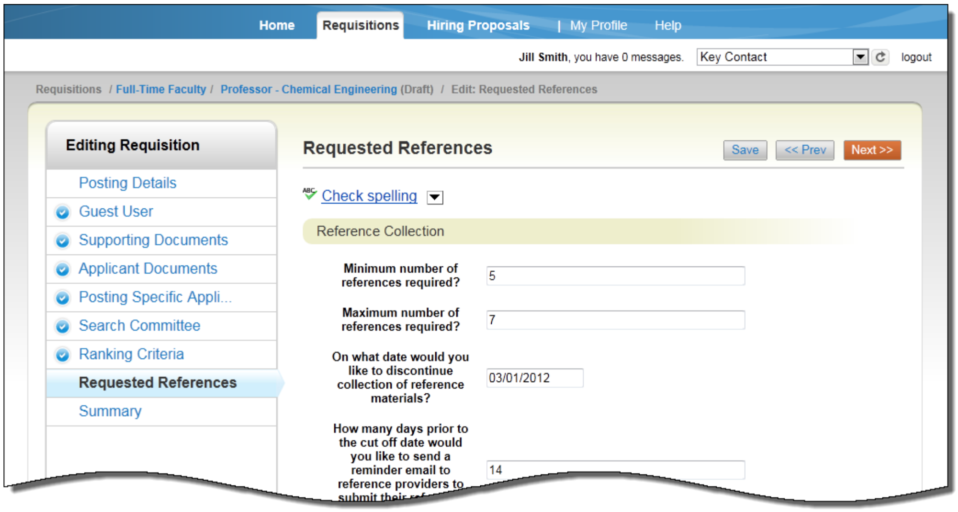


- Press the question link and designate the workflow state at which time the search committee members will be able to enter their comments / answers.

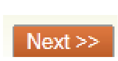


24. Press Next >>

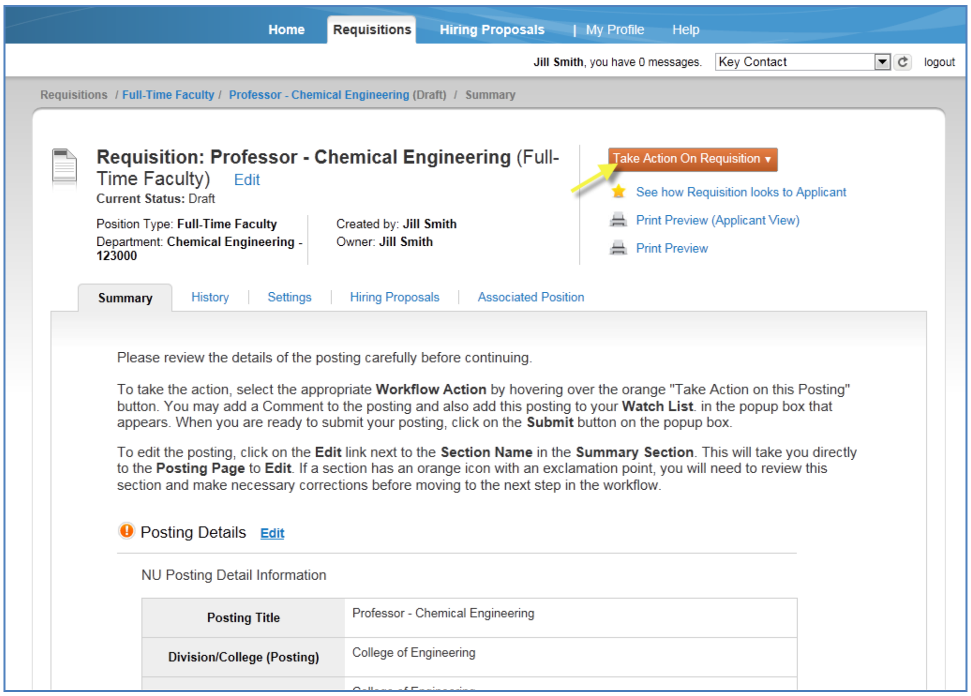
25. Requested References – If a workflow state was selected in the beginning of the Create Requisition process (see page 62) and you enter information in the Requested References section below, Referees will be notified electronically. Otherwise, the candidate will only be required to provide the minimum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



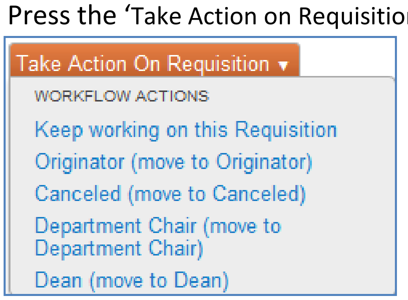
Requested References Form	
Field	**Notation about the Field**
Reference Collection section	
Minimum number of references required?	Enter a number in these fields
Maximum number of references required?	
On what date would you like to discontinue collection of reference materials?	Date field
How many days 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 

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.



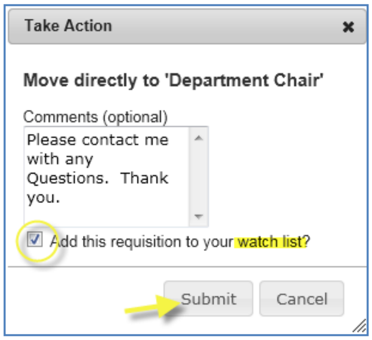
28. Press the 'Take Action on Requisition' button and select Department Chair



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.

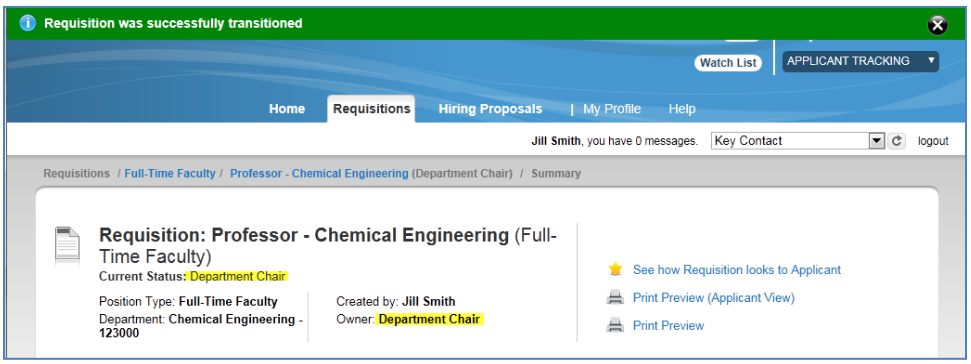


The Take Action window:

- 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.

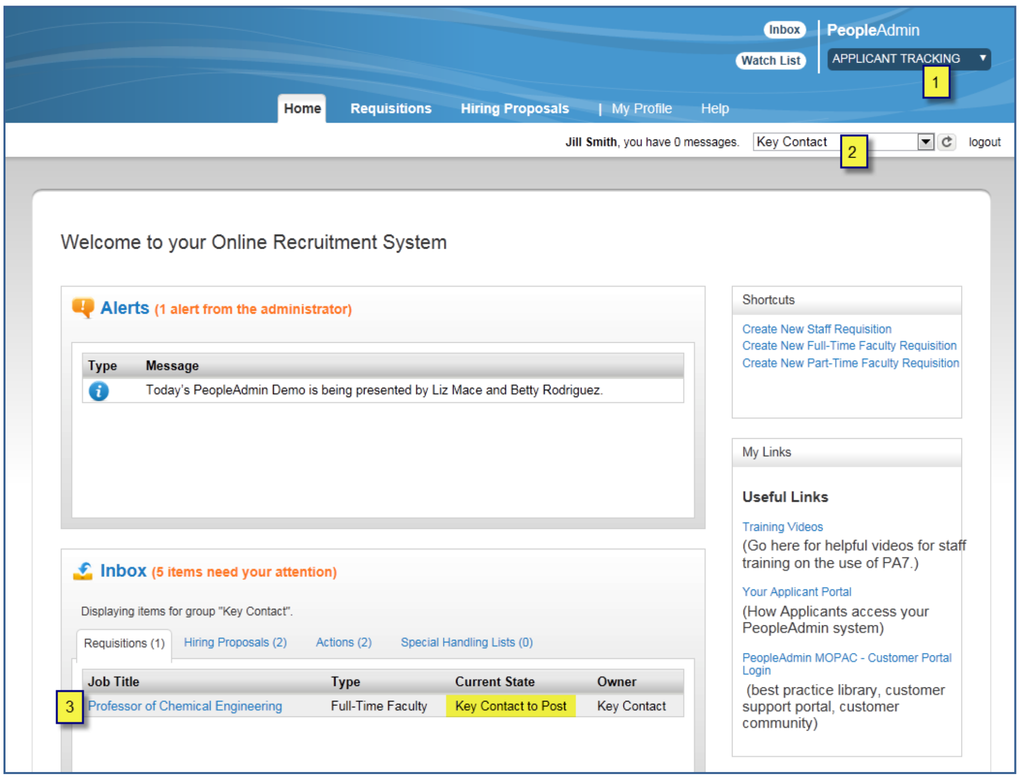


Post a Faculty Requisition

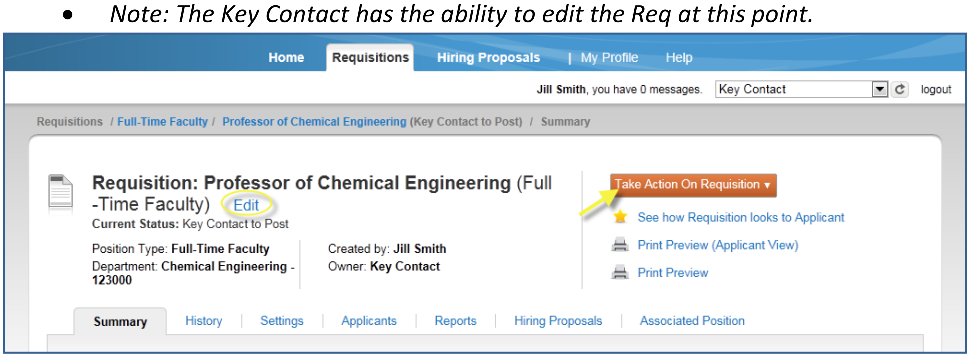
The Provost can move the Requisition 'forward' to the Key Contact as an Approval to Post. The Key Contact will see the Req in their inbox, which will have the Current State of 'Key Contact to Post'.

Steps to Post a Faculty Requisition

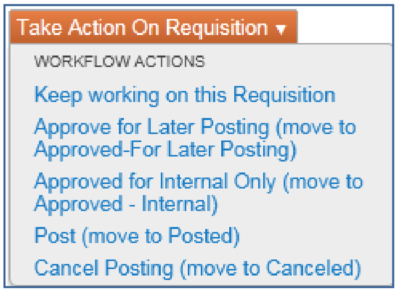
1. Go to Applicant Tracking Module
2. Change role to Key Contact
3. From the Home page, go to the Inbox and click on the Requisition Title.



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



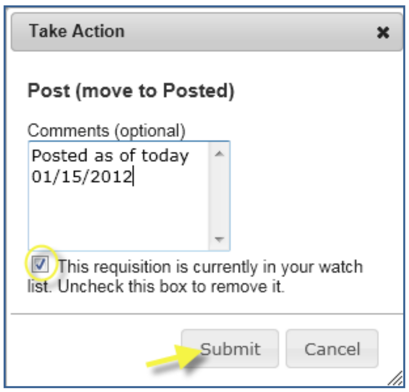
5. Take Action on Requisition: **Select Post.**



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.

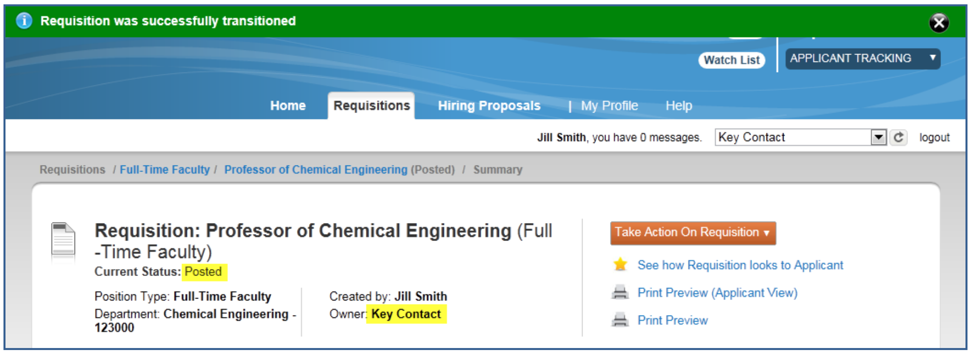


The Take Action window:

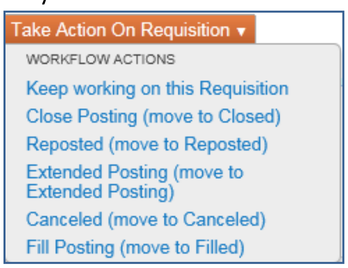
- You can enter a **comment** which would appear in the transition email to HR/Employment. (Comments do not get stored in the Req or Posting).
- The checkbox for "**This requisition is currently in your watch list.**" is defaulted as checked. You can monitor the subsequent activity of this action using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

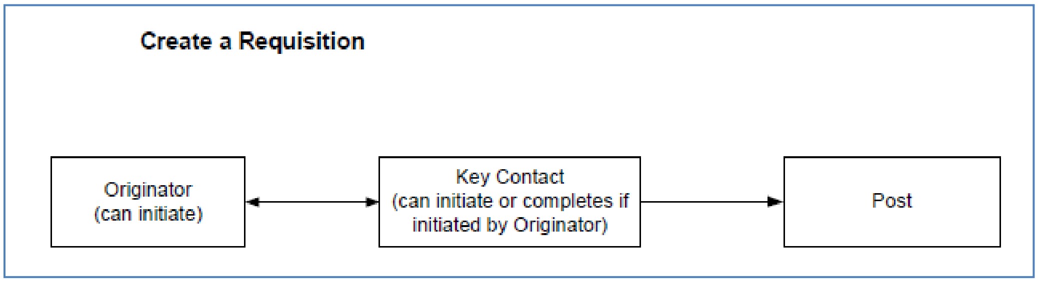


The **Take Action** selection will move this Requisition to one of the Posting options:

- **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.

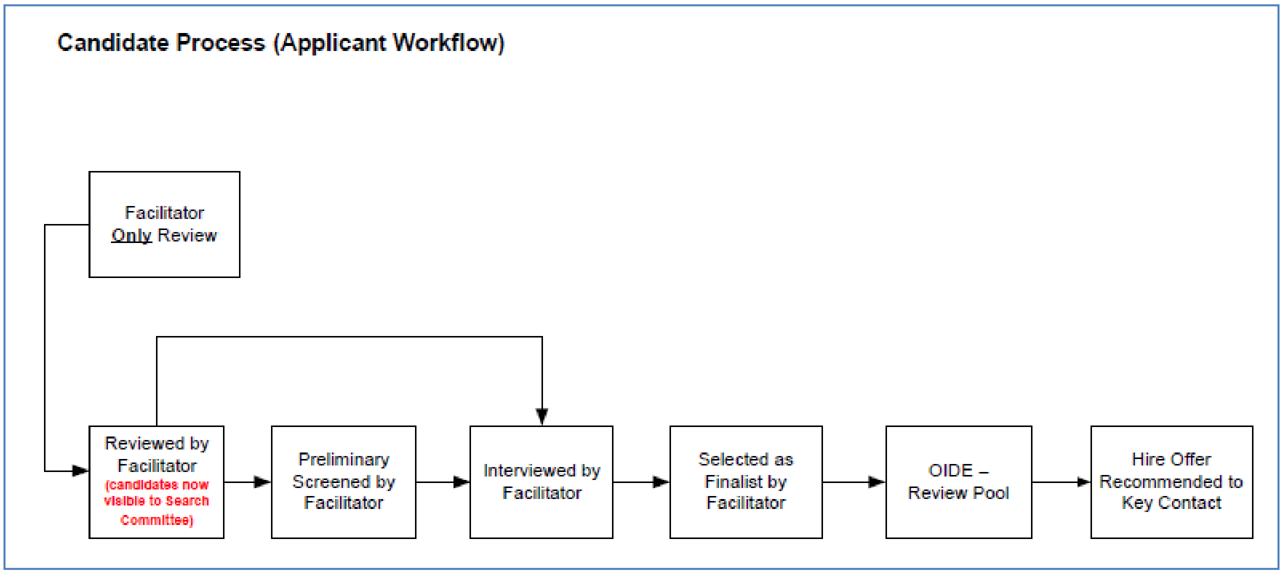
Review / Edit Part-Time Faculty Posting

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



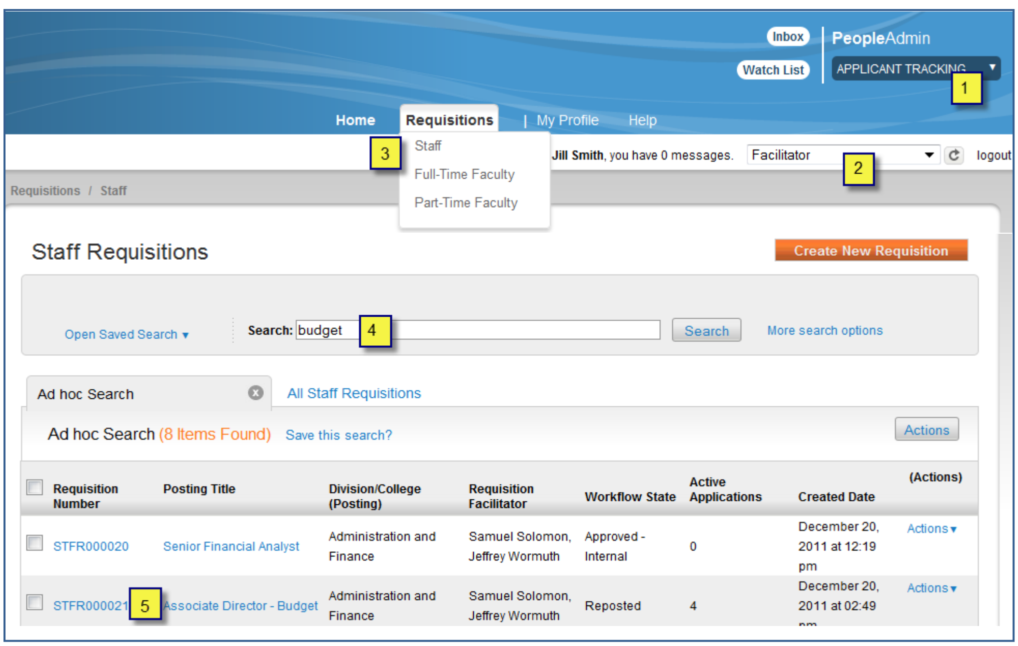
Manage Staff Applicant Pool

Key Points:

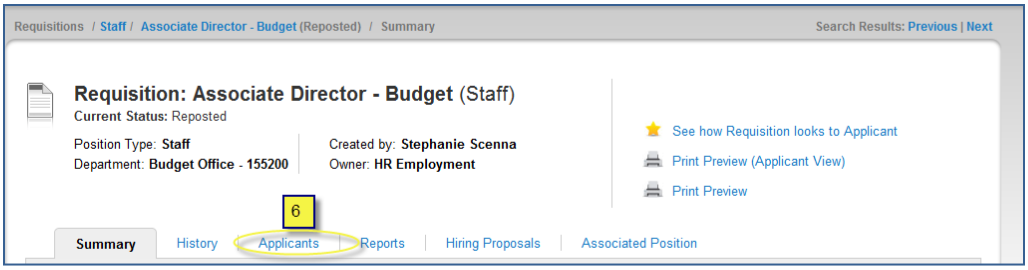
- ✓ As a Key Contact, you are automatically a Facilitator even though you may not be specifically named as such on a Requisition.
- ✓ A Key Contact may also a member of a Search Committee
- ✓ Applicant Dispositions: Below are the 3 options available to a Facilitator, who can use any combination of the 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

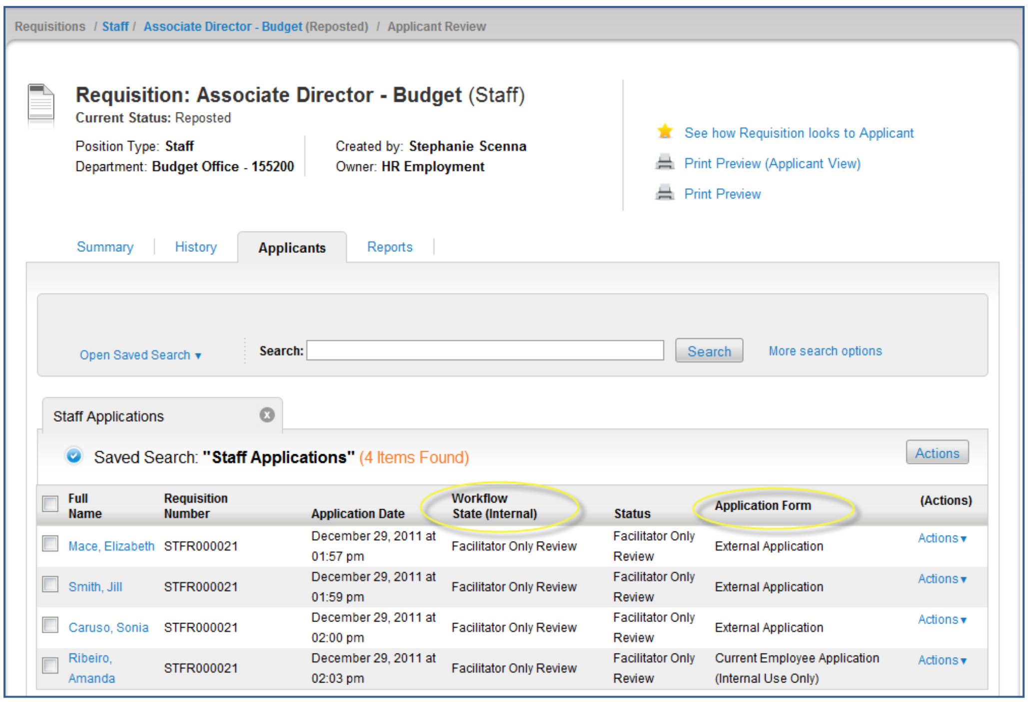
1. Select the Applicant Tracking module
2. Change role to Facilitator
3. Go to Requisitions > Staff
4. Search for the Requisition
5. Click on Req # or title



6. Go to the Applicants tab



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



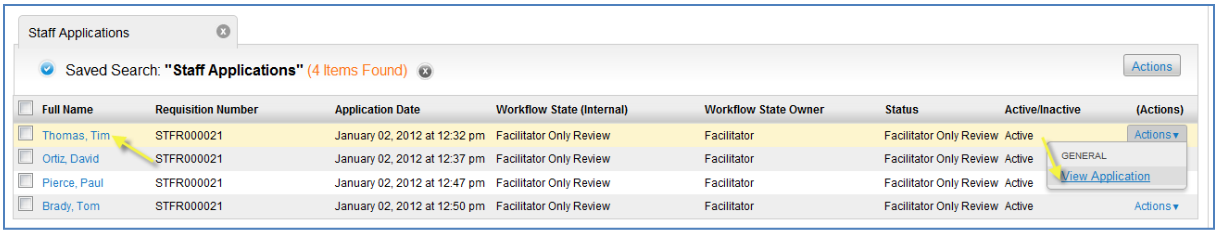
Search Results:

- 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.

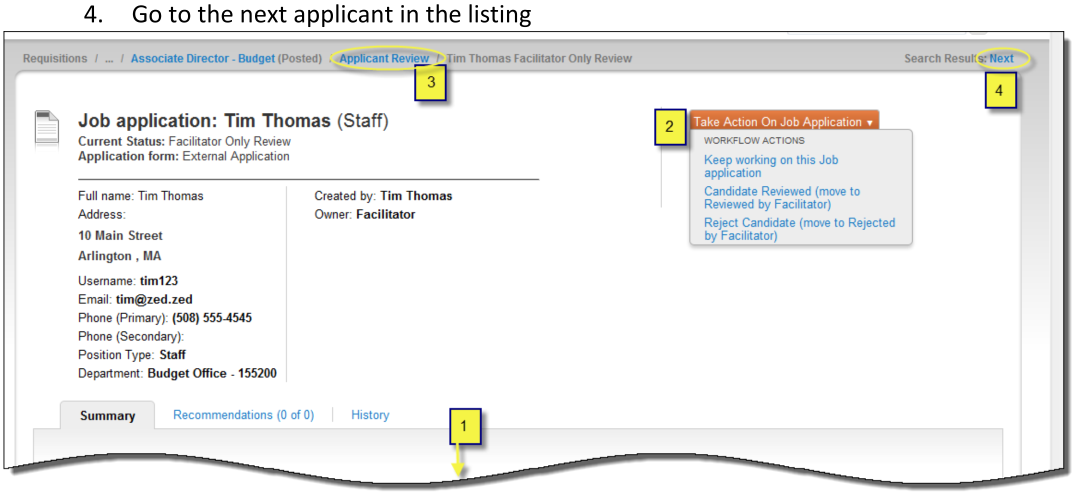
A. To review one applicant at a time:

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



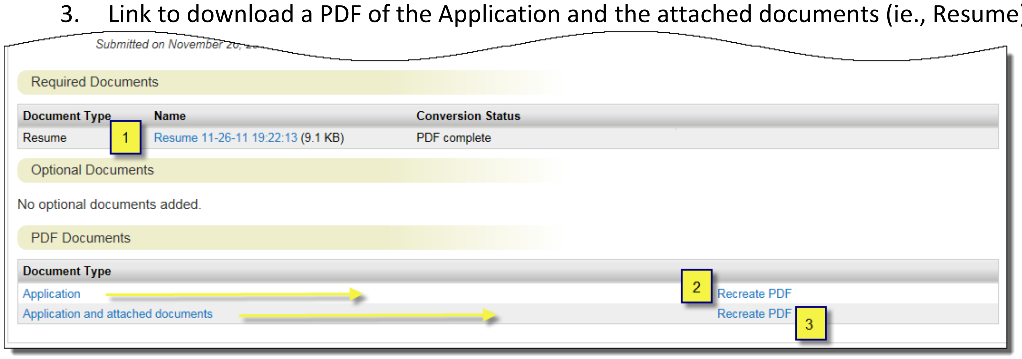
At the **top** of the application, you can do the following things:

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



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

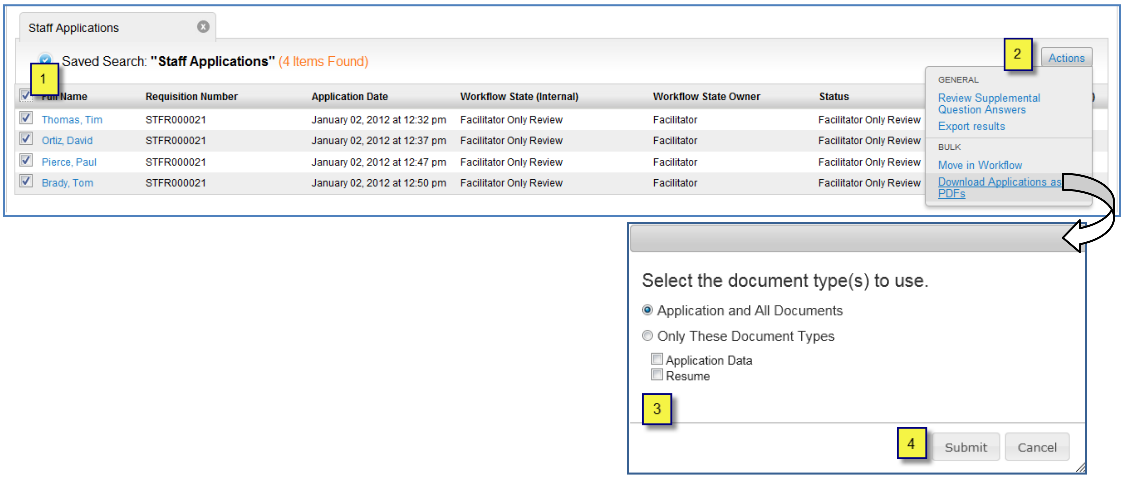
1. Link to the PDF resume
2. Link to download a PDF of the Application
3. Link to download a PDF of the Application and the attached documents (ie., Resume)



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



C. To Review Supplemental Questions

Return to your Applicants.

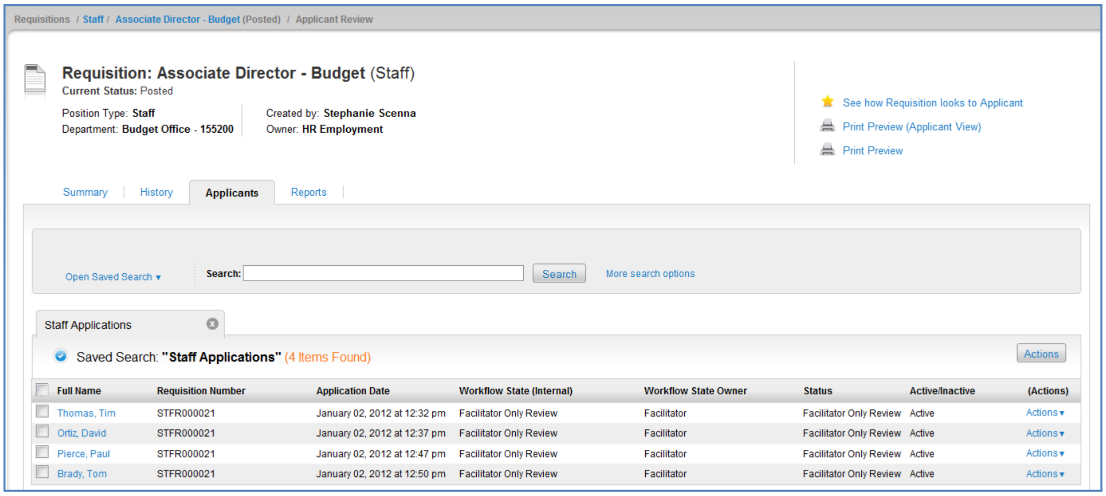
1. Select all applicants
2. Click on Actions > Review Supplemental Questions

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

Return to your Applicants.

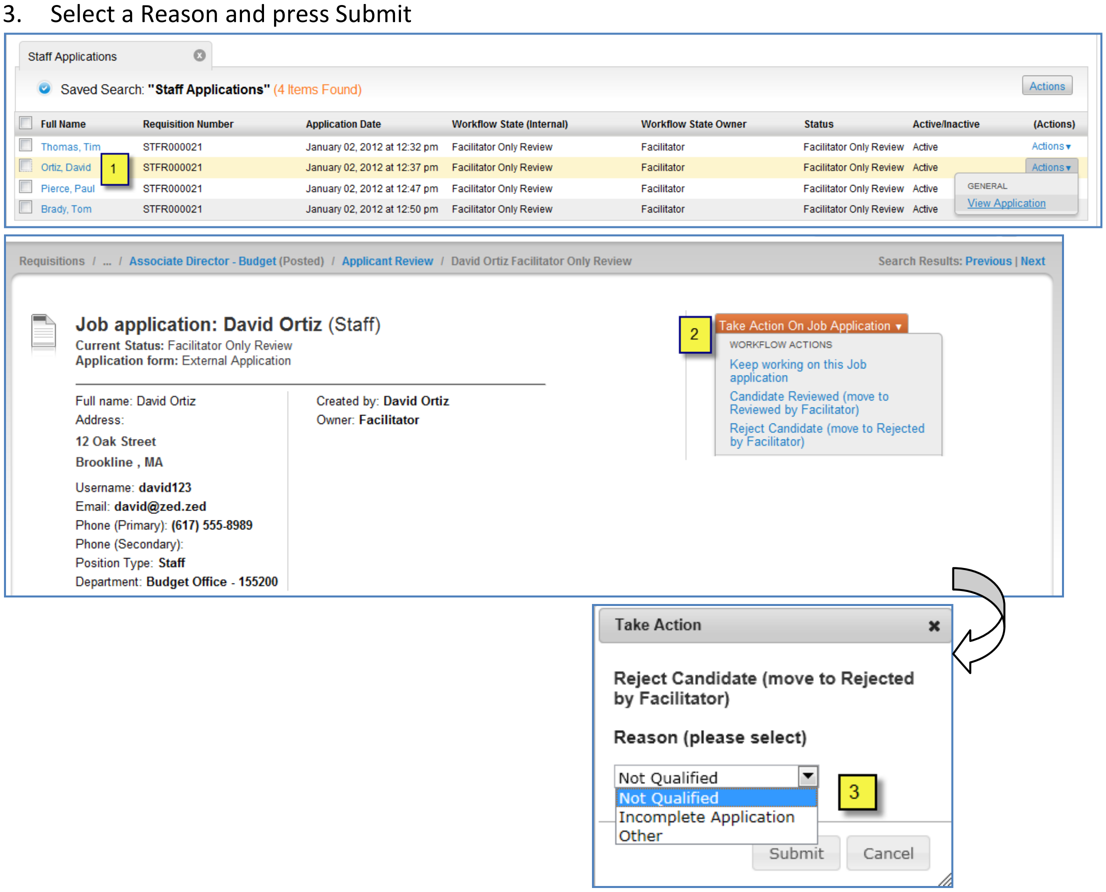
1. Select all applicants
2. Click on Actions > Export Results.

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'.



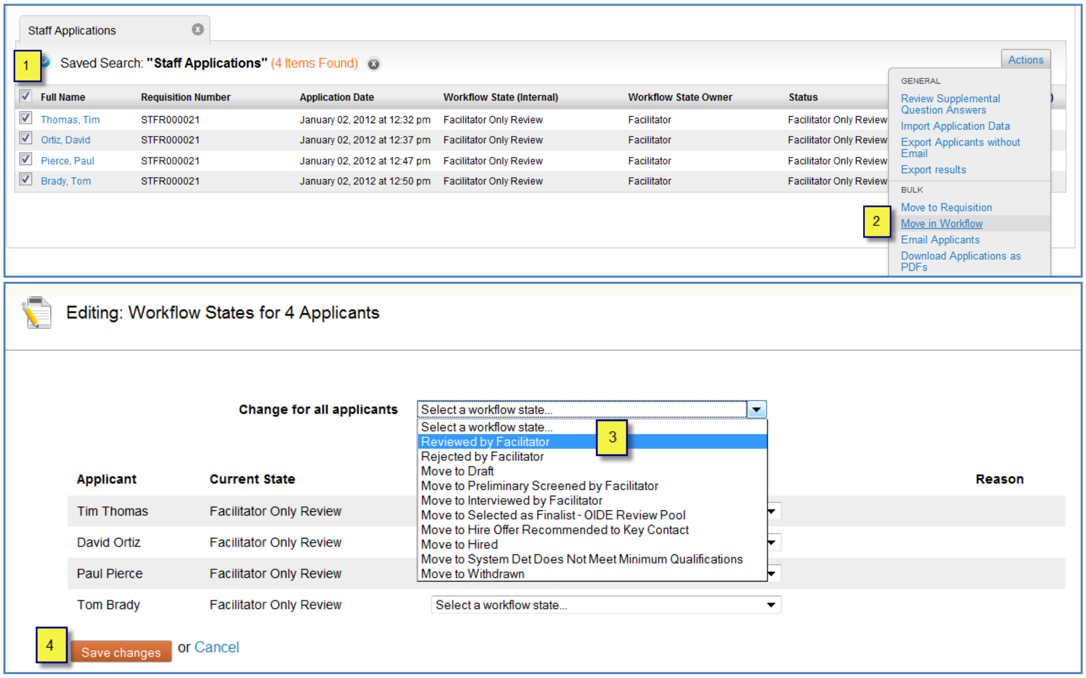
A. Take Action on one applicant (Reject).

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



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



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:

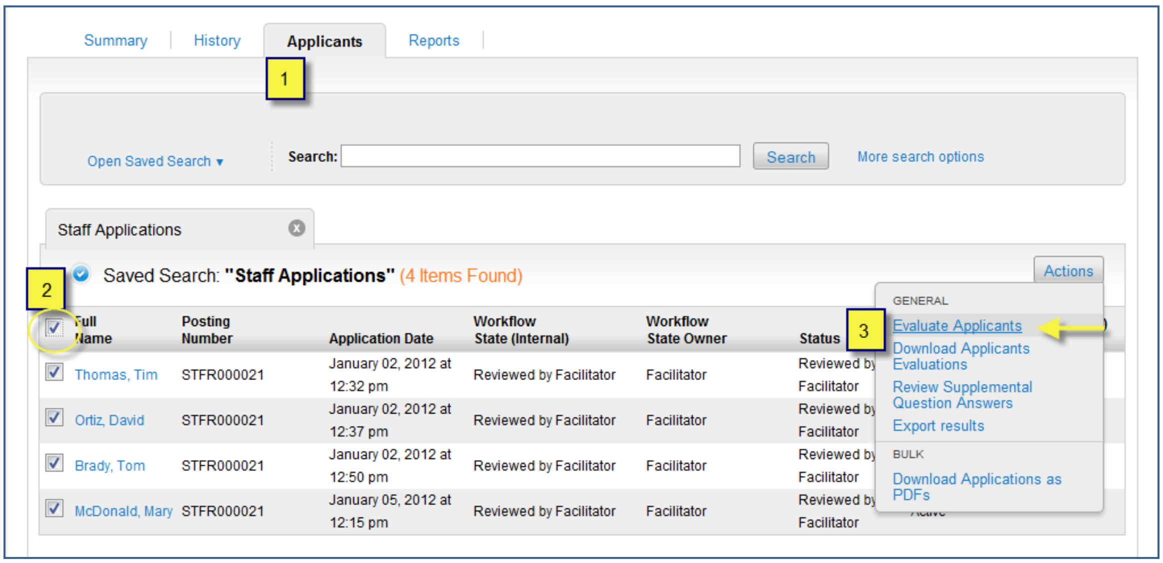
- **Preliminary Screened** by Facilitator (optional)
- **Interviewed** by Facilitator (required)
  - Once Interviewed is selected, the Facilitator can select **Finalist** – and then it's ready to go to OIDE. Afterwards, the Facilitator will not be able to take any Actions on these applicants.

How to Rank an Applicant (Search Committee Members)

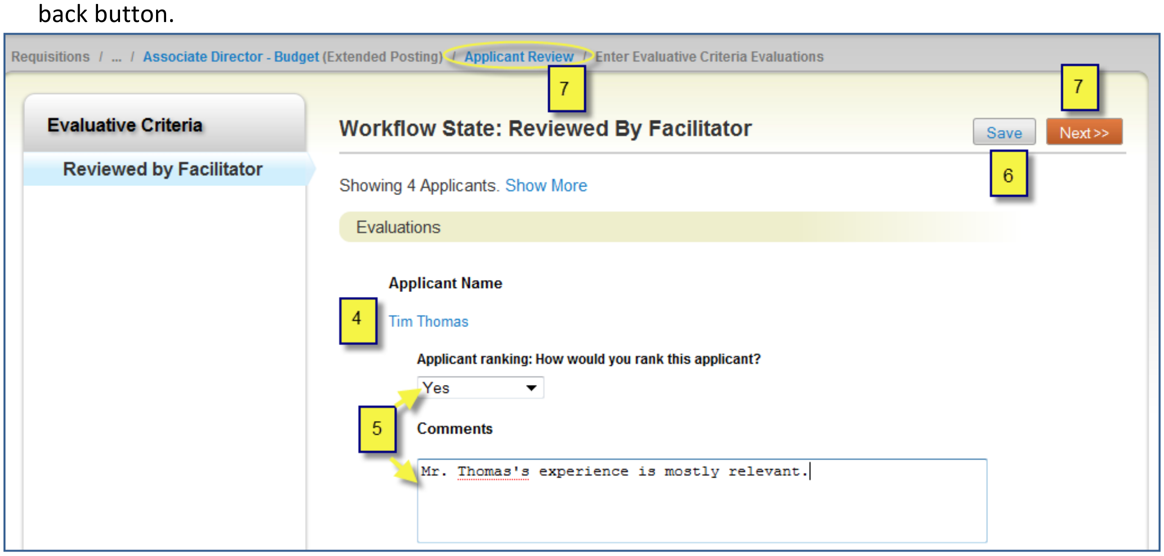
Steps to Rank Applicants (Search Committee Members)

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.



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.

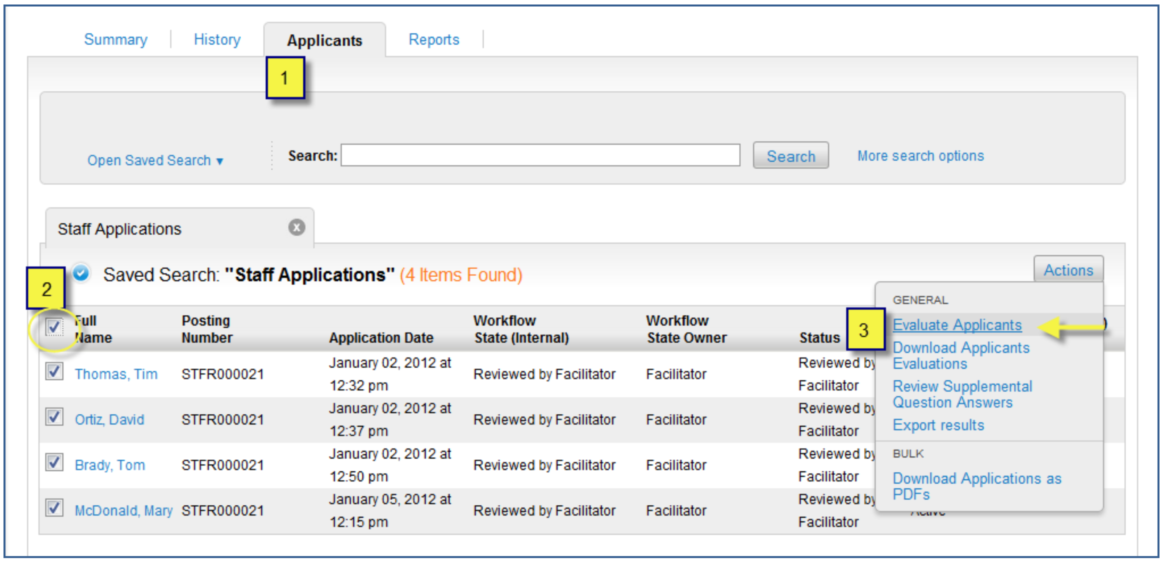


How to View Applicant Evaluations (Search Committee Chair)

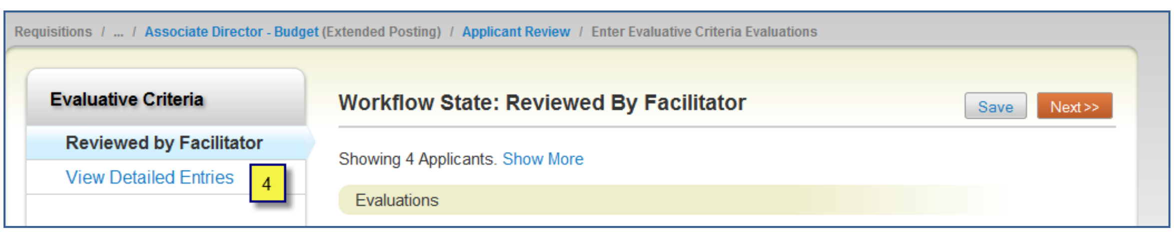
Steps to View Applicant Evaluations (Search Committee Chair)

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.

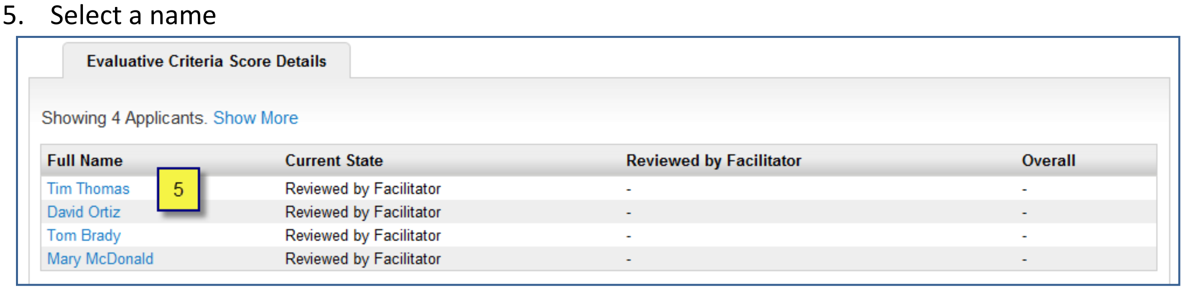
1. Navigate to the Requisition and select the Applicants tab.
2. Select all applicants
3. Click on the Actions button and choose Evaluate Applicants.



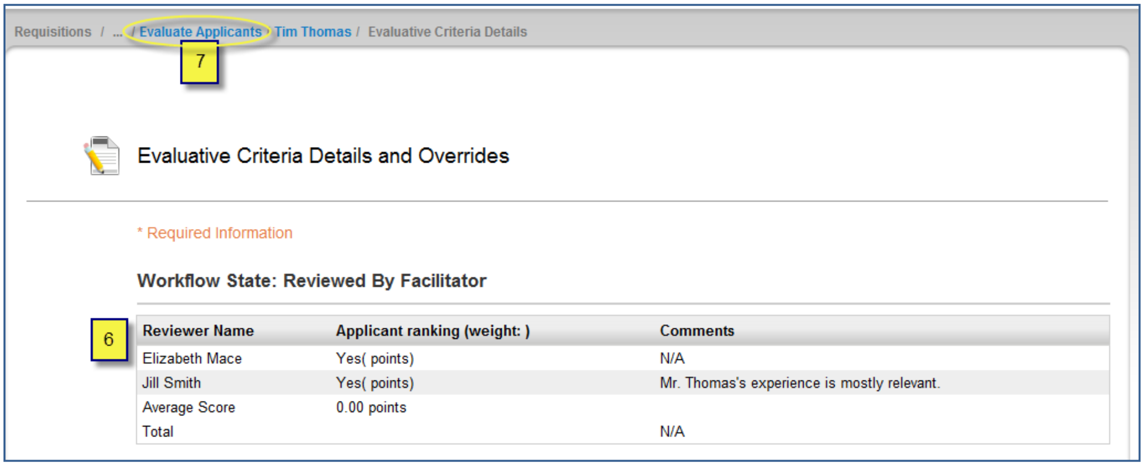
4. Click on View Detailed Entries



5. Select a name



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.

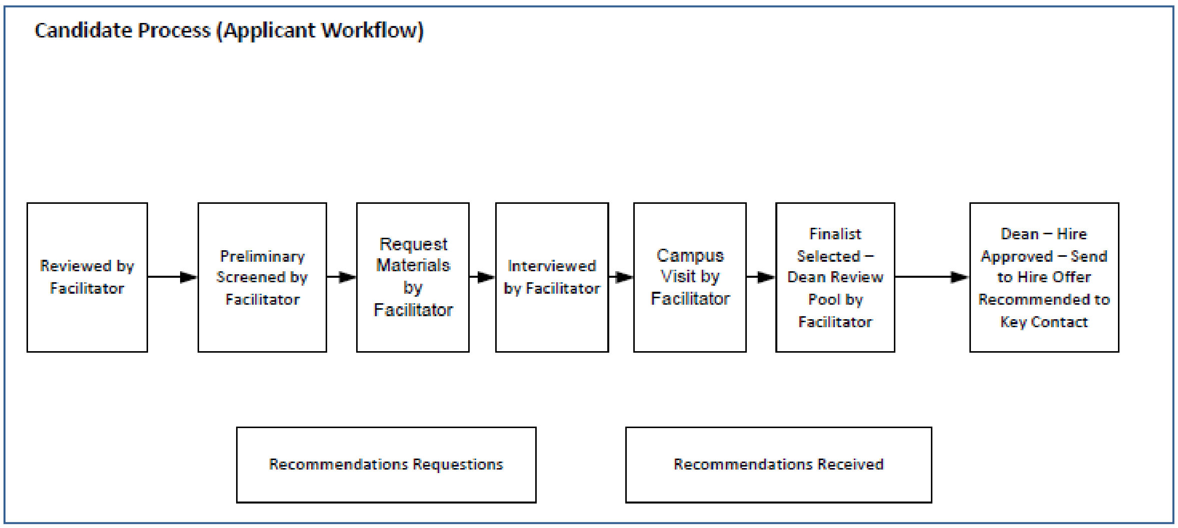


Faculty

Manage Faculty Candidates

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

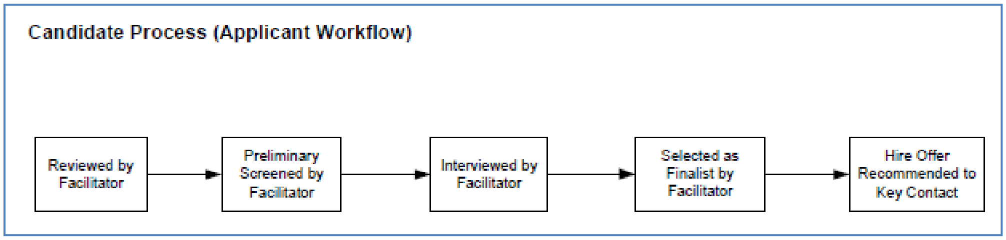
- The <u>Search Committee</u> has immediate view to all candidates.
- The <u>Facilitator</u> will have the ability to select from multiple workflow states for Faculty Candidates.
- The <u>Dean</u> will select the workflow state of 'Hire Offer Recommended – to Key Contact' before the Hiring process can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



Manage Part-Time Faculty Candidates

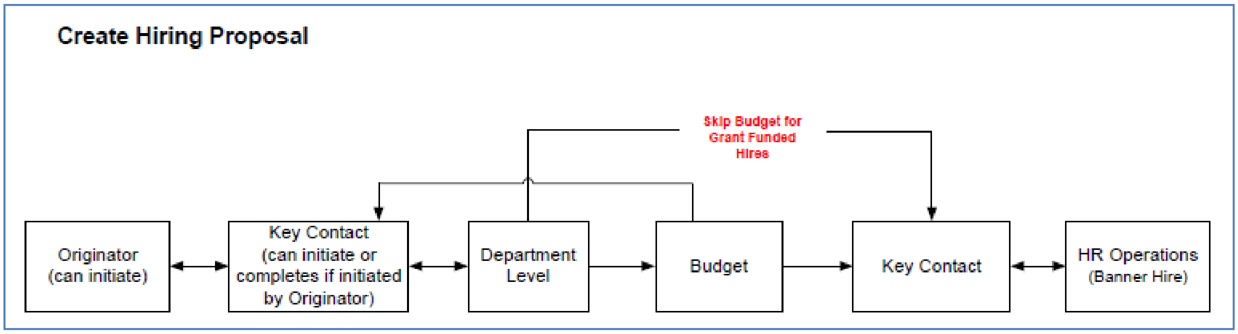
Please refer to the instructions for Staff Applicants. The tasks are the same with the following exception:

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



Hiring Employees

Staff

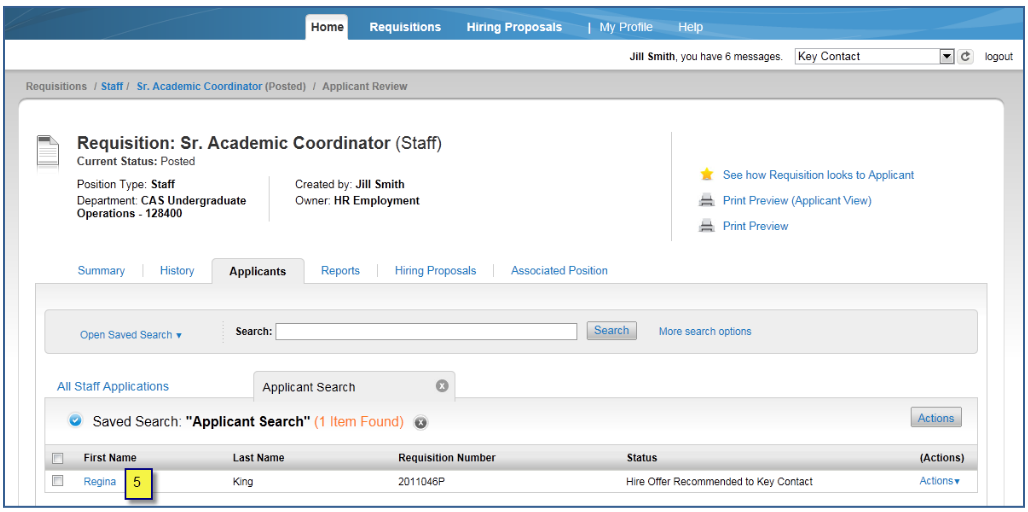


Initiating a Staff Hiring Proposal

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.

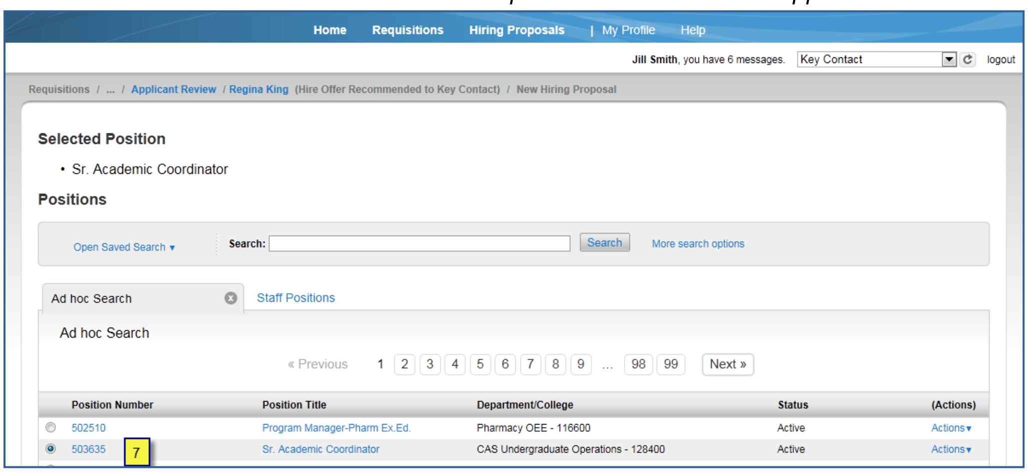
Steps to Initiate a Staff Hiring Proposal

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



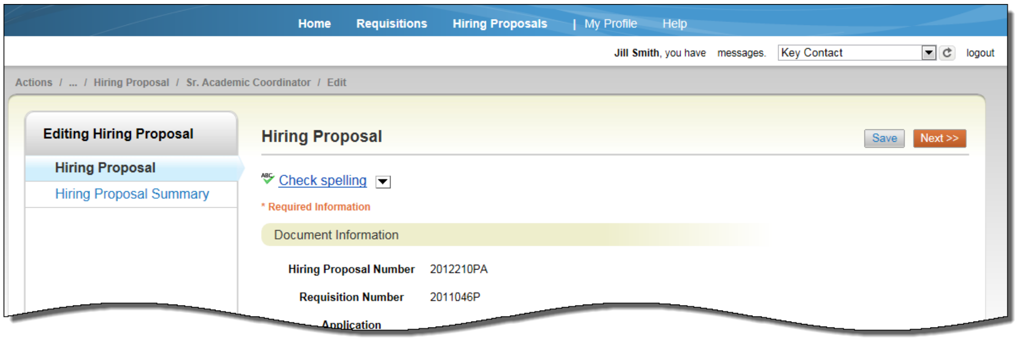
6. Click ‘Start Hiring Proposal’

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.*



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

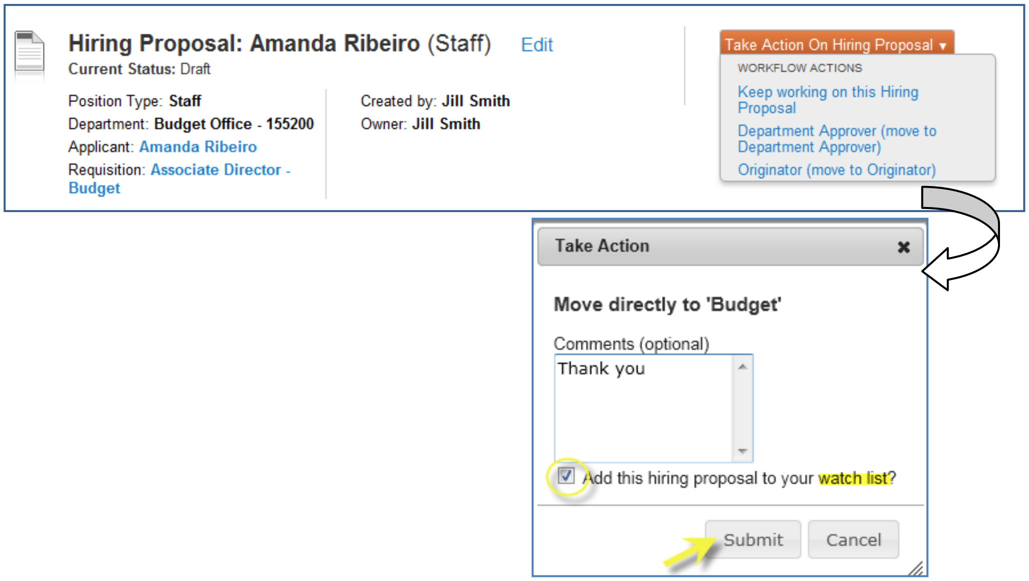
9. Complete the Hiring Proposal Form:



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 is 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 Position Number	Populated from the Position
Annual Salary	Key Contact must enter a value here.
Hourly Rate	Key Contact must enter a value here.

Min Expected Hiring Range Max Expected Hiring Range	Populated from the Requisition
Shift	Key Contact must enter a value here.
Hours per day	Populated from the Requisition
Contract Start Date Contract End Date	Optional
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.*

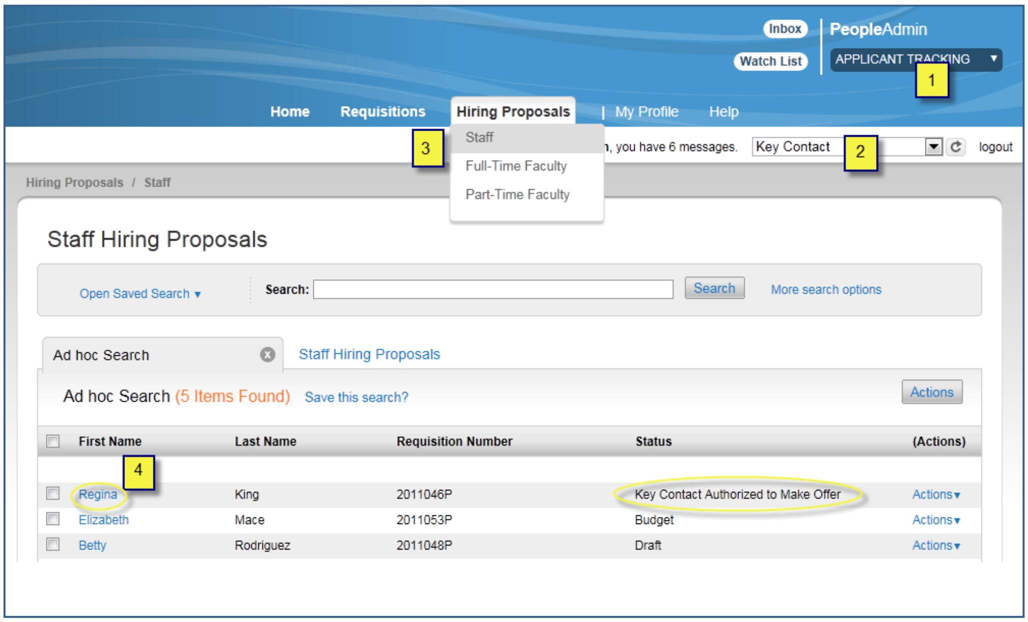


Transition Staff New Hire to HR

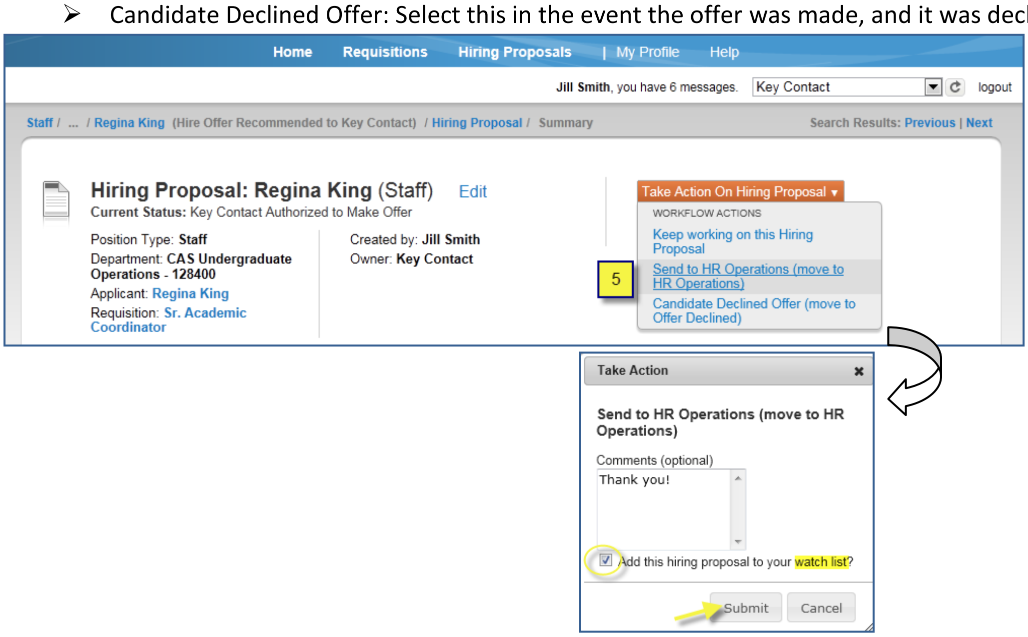
When all approvals have been completed, the Key Contact will need to take the final step in the workflow.

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.



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.

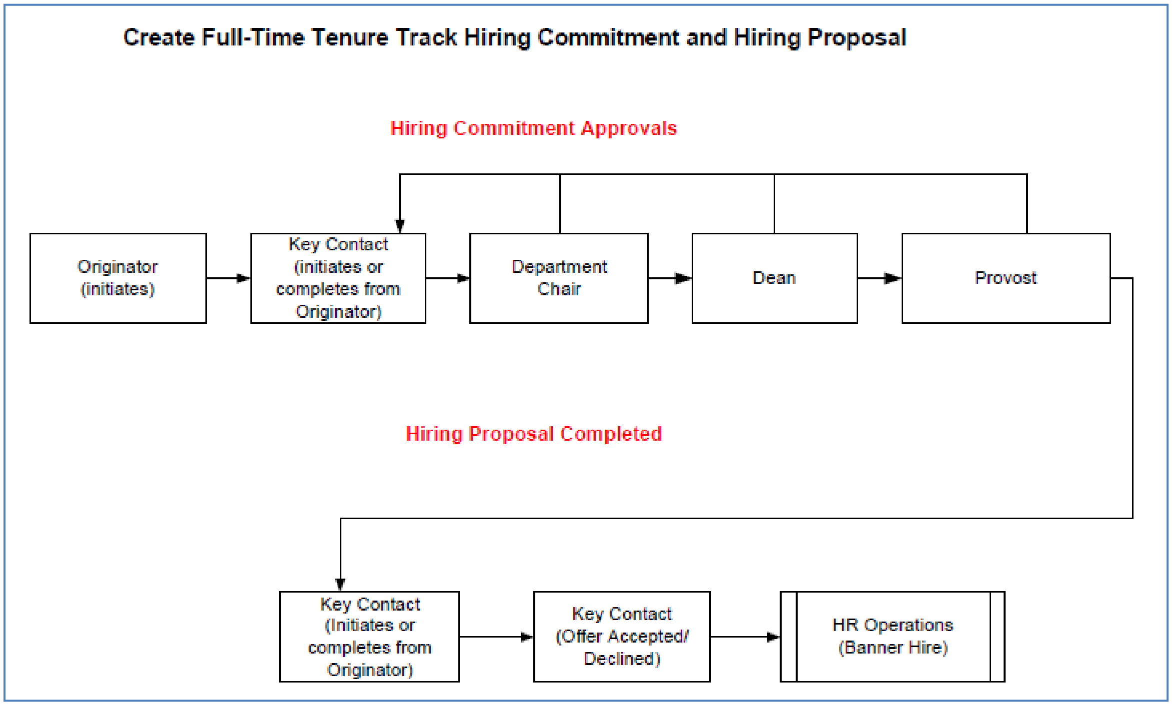


6. HR Operations will then move the Hiring Proposal to the Status of ‘Hire Approved – Position Updated’ once the hire packet has been received.
7. HR Employment will then move the Requisition to ‘Filled’ (not ‘Closed’) in order to remove the posting from the web site.

Faculty

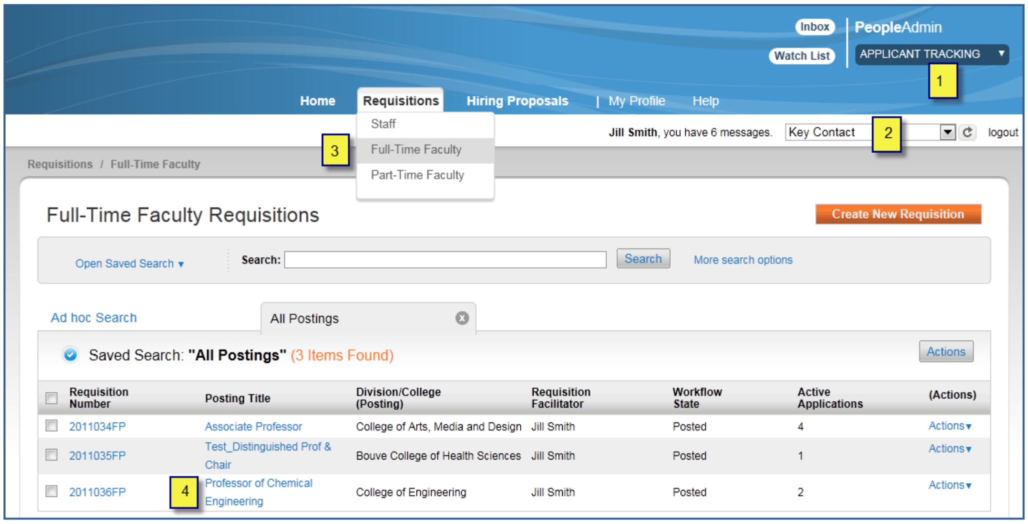
Full Time Tenure Track Hiring Commitment and Hiring Proposal

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

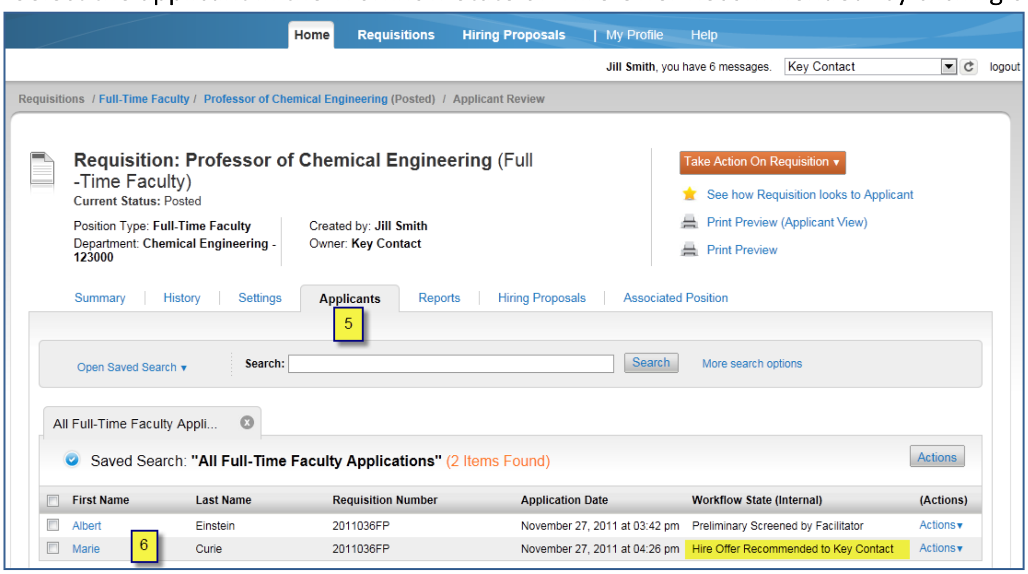


Steps to Initiate a Faculty Tenure Track Hire

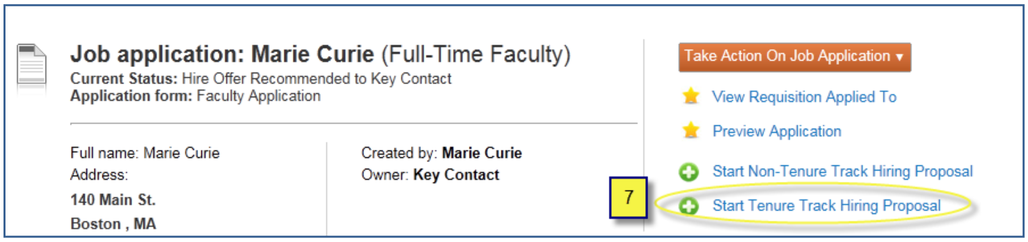
1. Select the Applicant Tracking module
2. Change role to Key Contact
3. Go to Requisitions > Full-Time Faculty
4. Click on the title of the Requisition



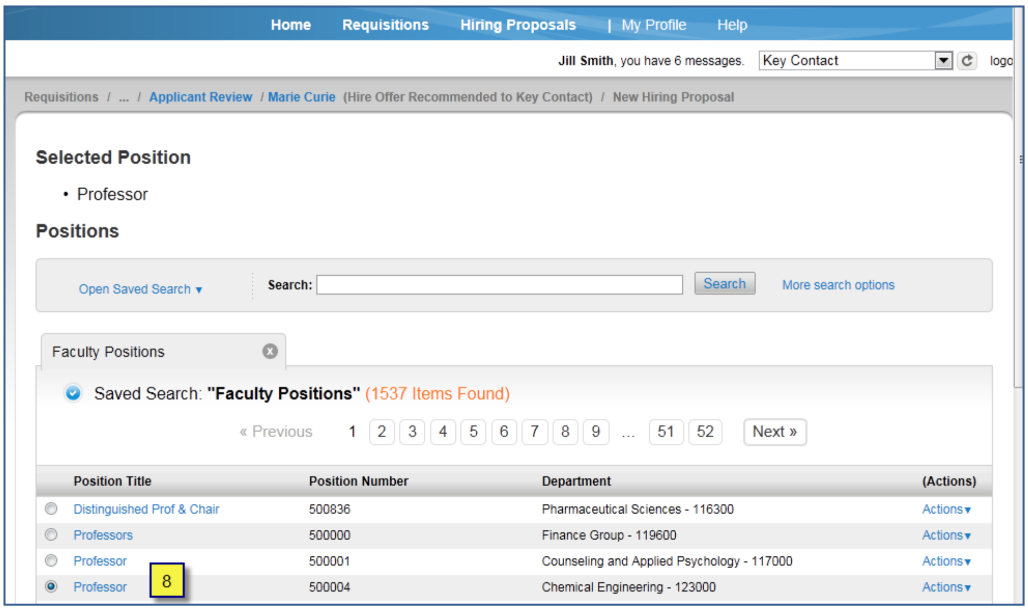
5. Click on the applicant tab
6. Select the applicant in the Workflow State of 'Hire Offer Recommended' by clicking on the name.



7. Click ‘Start Tenure Track Hiring Proposal’



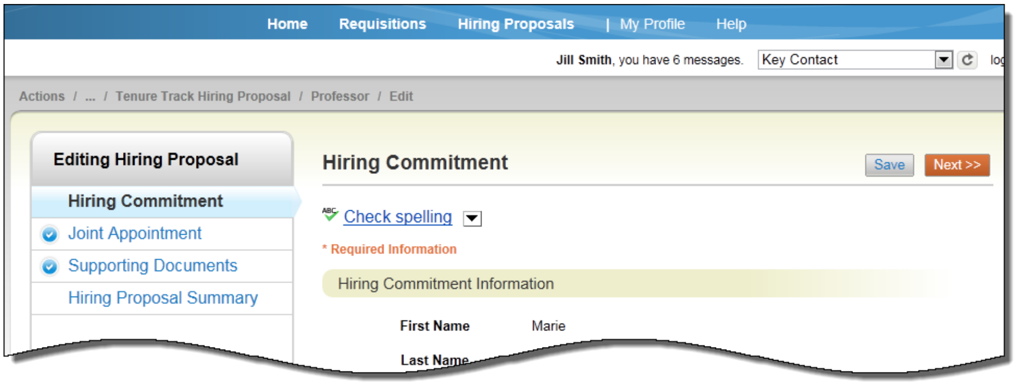
8. A Positions listing appears next; the Position to which the Req was originally attached, is selected. You may review Position information by clicking on the Position #, and you can select another Position for this Hiring Proposal. If you created a Req ‘from scratch’ (from Position Type) you will need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



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

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

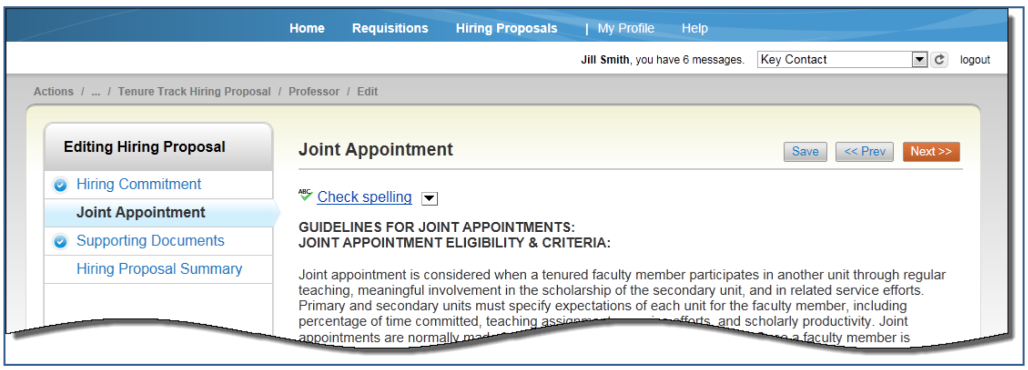
- Hiring Commitment
- Joint Appointment
- Supporting Documents



Hiring Commitment Form	
Field	**Notation about the Field**
Hiring Commitment Information section	
First Name Last Name	From Application
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	

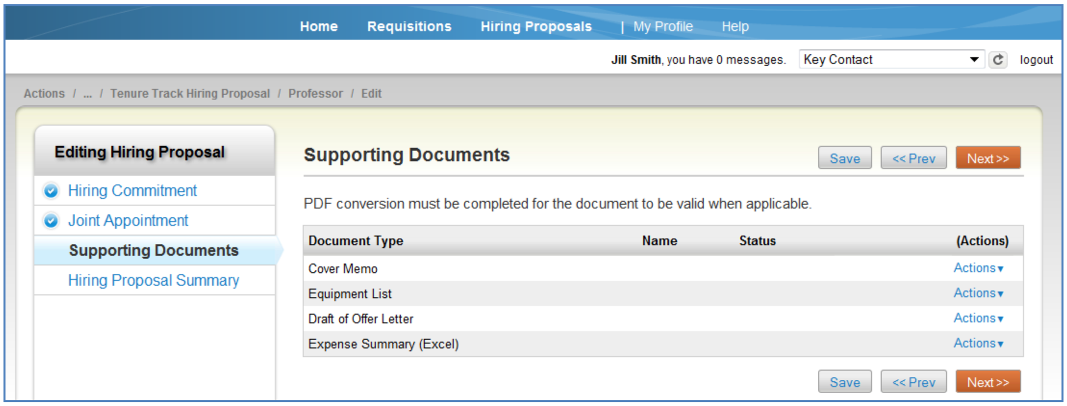
Type	Capital Equipment, Relocation expense, Stipends, Summer Salary, Other Non-Capital Startup, Other
Amount	
Amount per Fiscal Year	Specify amount and Fiscal Year
Source of Funds	
Type of Term	
Comments	Please specify details as necessary.
Office Space and/or Renovations section	
Building	
Room / Lab 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:

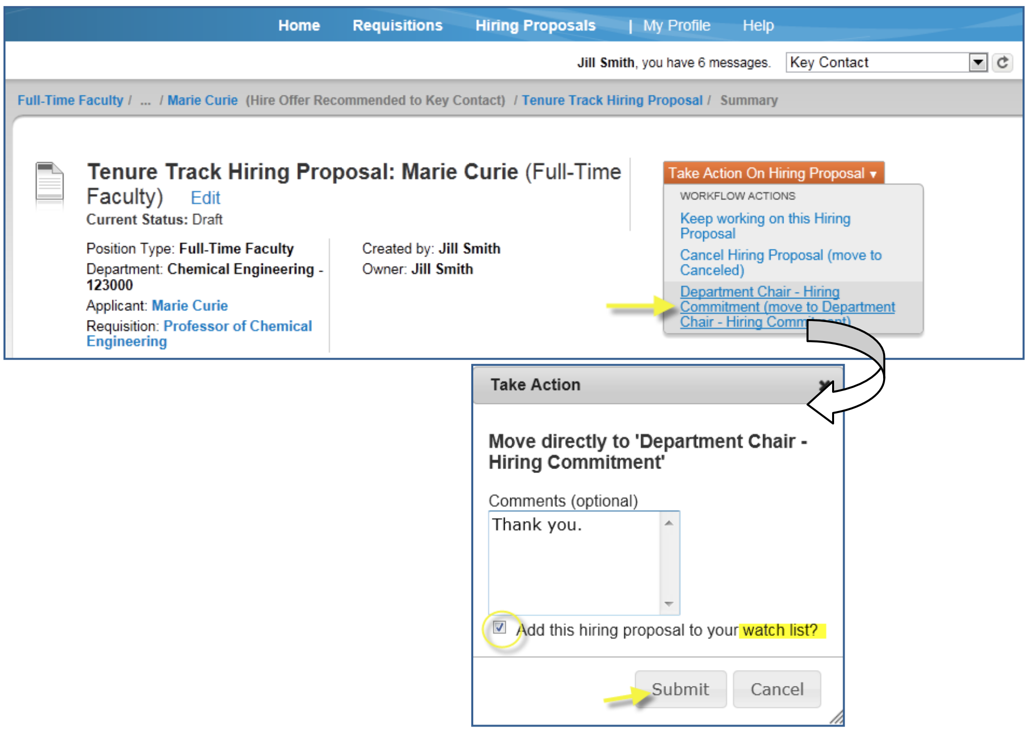


Joint Appointment Form	
Field	**Notation about the Field**
Primary College & Department (Locus of Tenure)	
Name of College & Department	
Specify teaching load percentage (at least 50% or # of courses/units)	
Courses / Units Per Year	
Other Responsibilities	
Secondary College & Department	
Name of Secondary 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:



To Take Action on Hiring Commitment:

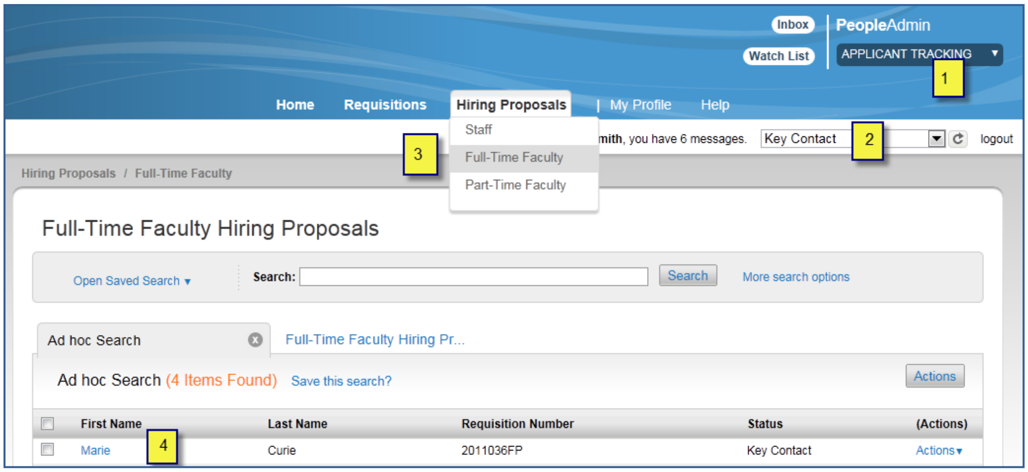


Creating a Tenure Track Hiring Proposal

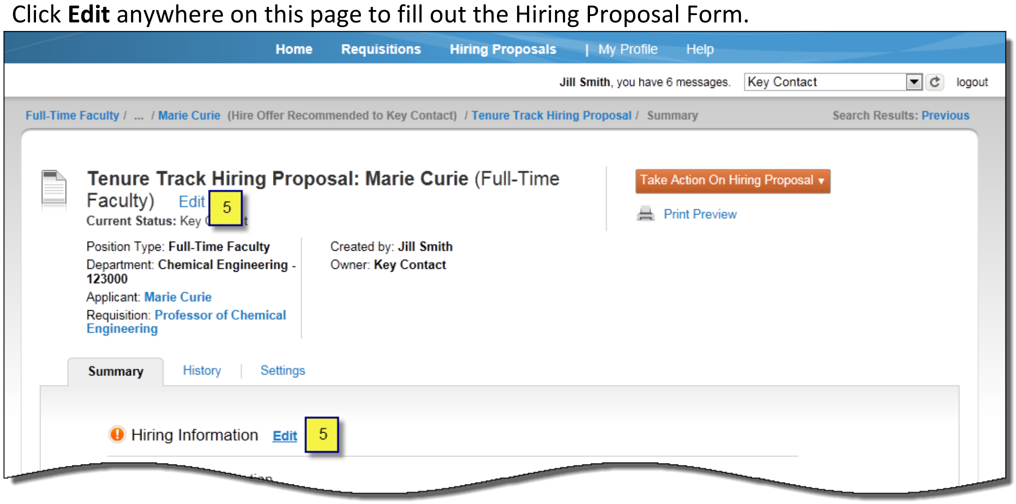
This step occurs after the Provost has approved the Hiring Commitment and has sent it to the Key Contact.

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.



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

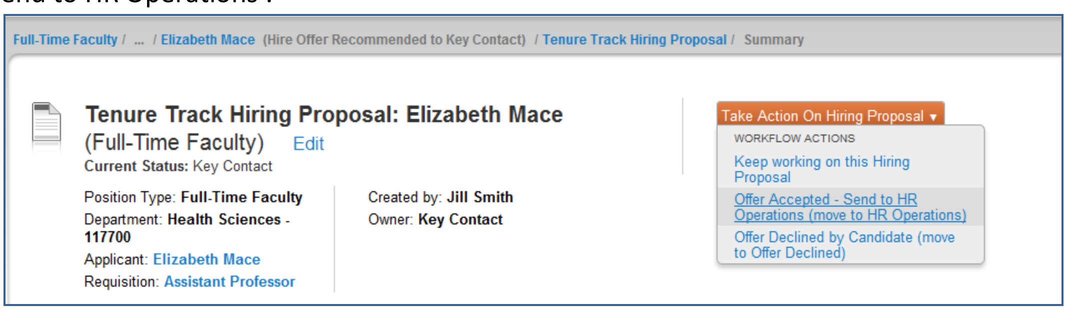


Hiring Proposal Form

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 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'.

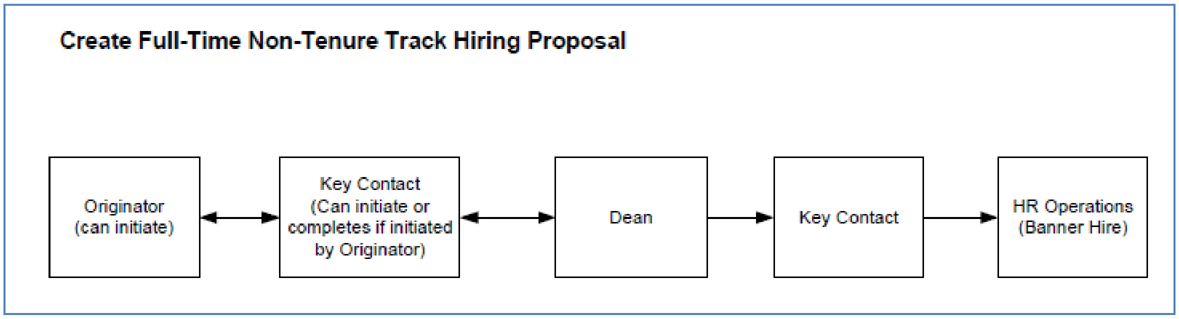


8. HR Operations will then move the Hiring Proposal to the Status of 'Hire Approved – Position Updated' once the hire packet has been received.
9. The Key Contact will then move the Requisition to 'Filled' (not 'Closed') in order to remove the posting from the web site.

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

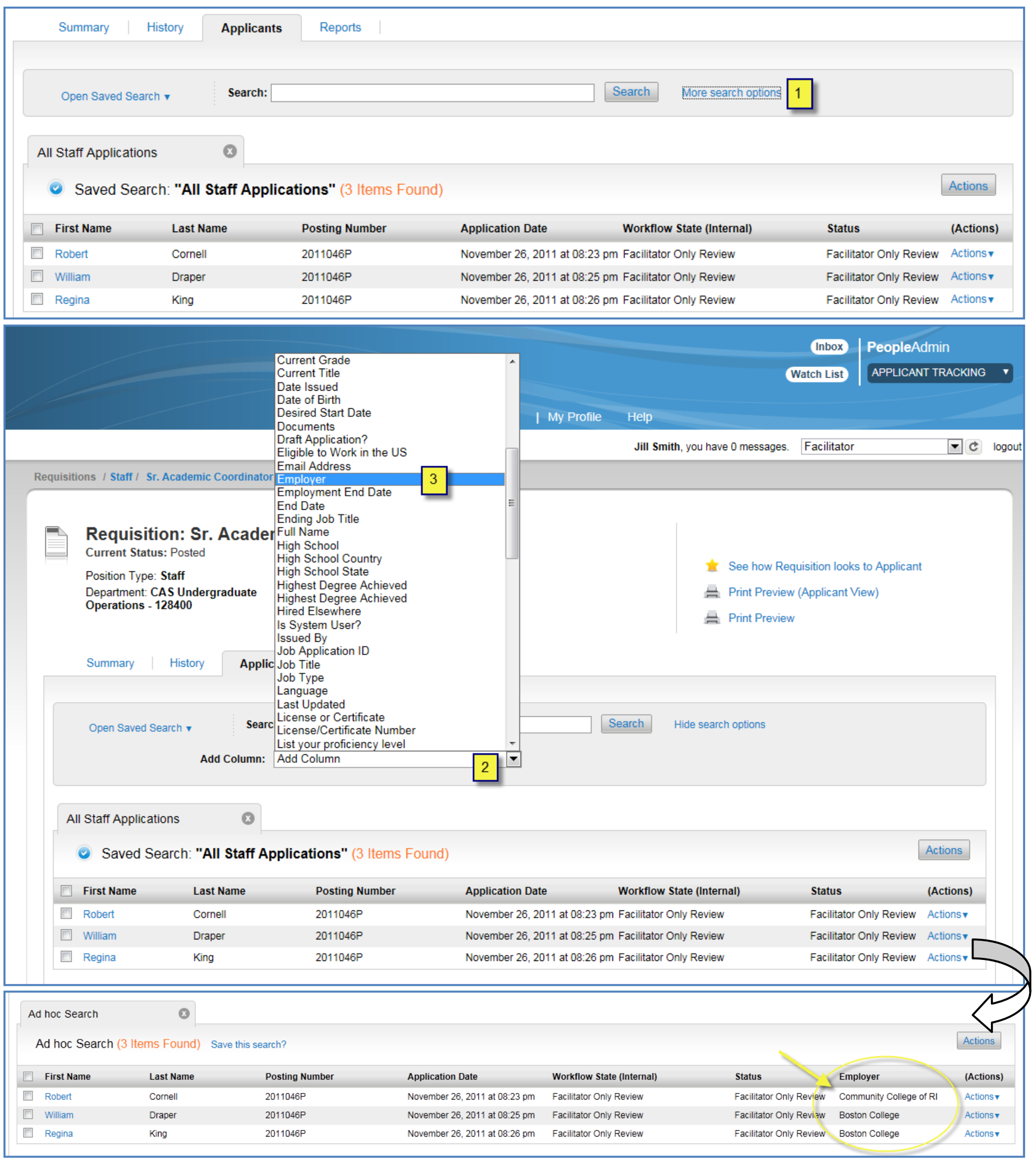
A. The Search Tool in PeopleAdmin

Default search results (all results) appear on your Positions, Requisitions, Applicants, 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.

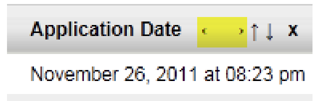
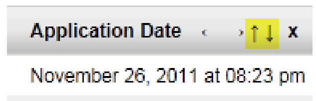
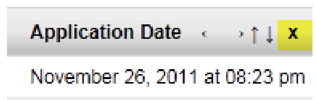
Formatting Search Results

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

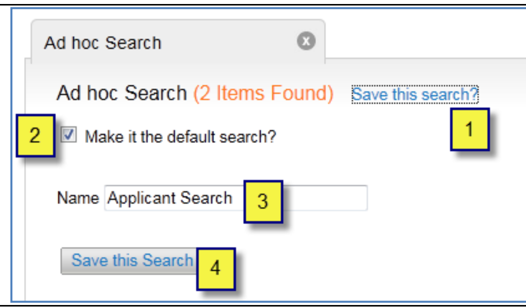


Working with columns in Search results

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

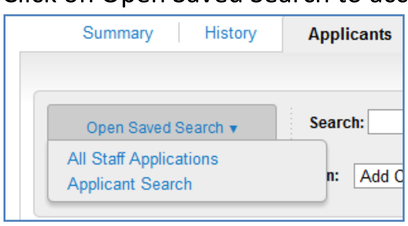
Saving a Search Format, after making changes

1. Click Save this search?
2. Check to make it your default search
3. Name the Search
4. Save



Using a saved search:

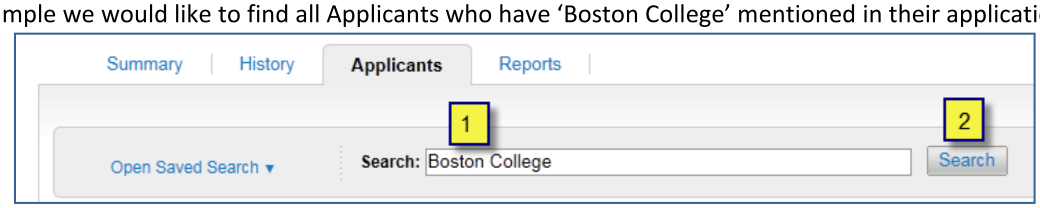
Click on Open Saved Search to access your saved, named searches.



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.