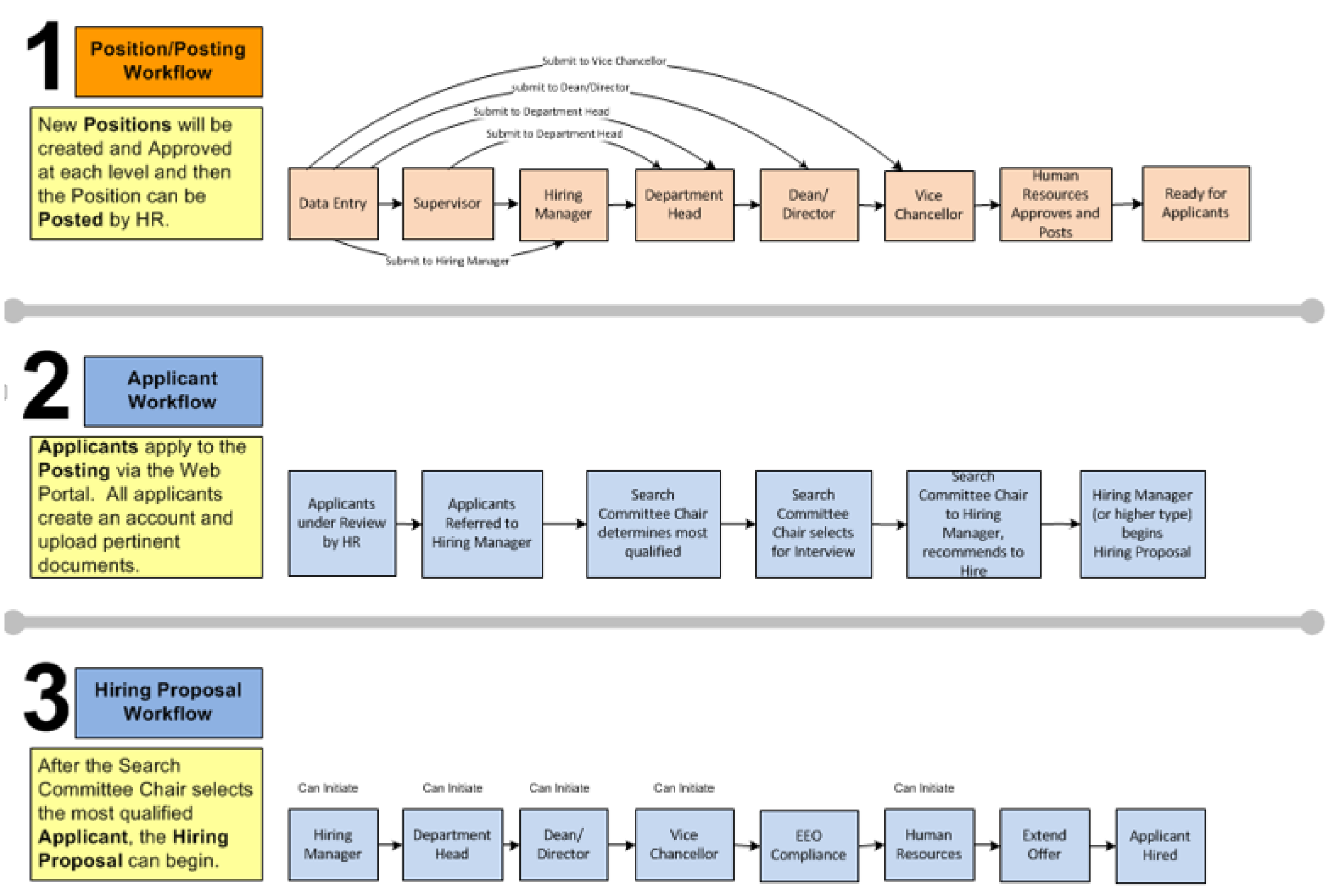
AppState Careers

Quick Steps – SHRA

This manual is designed to provide an overview and Quick Steps to use the AppState Careers Position Management and Applicant Tracking (Posting and Hiring Proposal) modules. Refer to the ASU detailed User Guides for specific details.

<u>This manual provides Quick Steps for:</u>

Workflow - SHRA



Creating a Position Description – SHRA

Step 1. Select POSITION MANAGEMENT from the drop down (upper right side of the screen).

Step 2. Select the correct Current Group if authorized (Data entry, Department Head, Hiring Manager, etc.) Current Group: Data Entry . You will receive a message indicating that you are now viewing as a member of the group you selected. Click the message box to close it.

Step 3. Select the Position Descriptions tab (top middle of the screen).

Step 4. Select the position type = SHRA.

Step 5. Click Create New Position Description (right side of screen).

Step 6. Click New Position Description in the pop-up box.

Step 7. Note that you can *Clone an existing Position Description* or create a *New Position Description*:

a. If cloning, search for the position at the bottom of the screen and click to select.
b. If not cloning, enter the Job Title, Division and Department.

Step 8. Click Start Position Action.

Step 9. Complete the required fields in each section beginning with *Position Justification*:

- Position Justification
- Classification Profile
- Position Details
- ADA Compliance Checklist
- Core Competencies
- Functional Competencies
- Overall Competency Level
- Position Budget Inform...
- Supervisory Position
- Additional Position Do...
- Posting Information
- Supplemental Questions...
- Applicant Document
- HR Analyst Notes
- Position Action Summary

***Note**: Clicking* Next >> *will save each section.*

Step 10. Once you complete all sections, you will be on the Summary page. Verify that each section is valid by the on the left. If a section is not valid , click Edit to fix it.

Step 11. When you are satisfied all data is valid, click Take Action On Position Action.

Step 12. *Workflow Actions* will vary based on the Position and your Current Group. Select the appropriate action.

Step 13. Add desired *Comments* and choose if you want to *Watch* this position status. ***Note that comments are emailed to the next approver in the workflow and cannot be removed.***

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Modifying a Position Description - SHRA

Step 1. Select POSITION MANAGEMENT ▾ from the drop down box (upper right side of the screen).

Step 2. Select the correct Current Group if authorized (Data entry, Department Head, Hiring Manager, etc.) Current Group: Data Entry ▾ . You will receive a message indicating that you are now viewing as a member of the group you selected. Click the message box to close it.

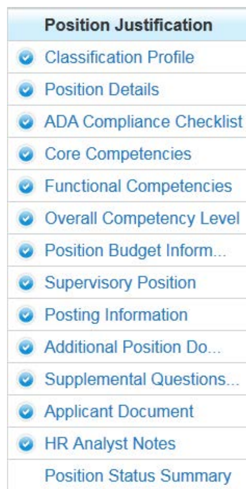
Step 3. Select the Position Descriptions tab (across the top middle of the screen).

Step 4. Select SHRA Position Actions.

Step 5. On the row of the desired position, click Actions ▾ on the far right.

Step 6. Click Edit from the Actions drop-down menu.

Step 7. Select the desired section to edit (from the menu on the left):



Step 8. Make the desired modifications and click Save .

Step 9. From the menu on the left, click on the Summary page Position Action Summary .

Step 10. When you are satisfied all data is accurate, click Take Action On Position Status ▾ .

Step 11. Workflow Actions will vary based on your Current Group. Select the appropriate action.

Step 12. Add desired Comments and decide if you want to Watch this position status. ***Comments are emailed to the next approver in the workflow and cannot be removed.***

Notes:

(1) If a position has not yet been approved, the level where approval is waiting can simply Edit while viewing the Position Summary.

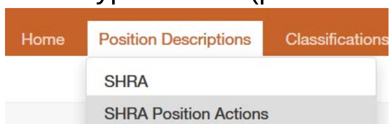
(2) Changes to a position will not be made to open Postings.

Viewing a Position Description – SHRA

Step 1. Select POSITION MANAGEMENT ▾ from the drop down (upper right side of the screen).

Step 2. Select the Position Descriptions tab (across the top middle of the screen).

Step 3. Select the desired position type: SHRA (position descriptions) or SHRA Position Actions (pending actions).



Step 4. Your default search will automatically execute.

Step 5. You can click Saved Searches ⌄, and select the desired one.

Step 6. You can create a new Ad hoc search by entering new search criteria Search or clicking More Search Options ⌄ to add columns or to select a specific Workflow State.

Once the search results are displayed at the bottom of the screen, you can move columns around, sort and delete columns by hovering over a column title and clicking an icon ‹ › ˄ ˅ ✖ (to the right).

‹ › = move the column to the left/right

˄ ˅ = sort ascending/descending

✖ = delete the column

Step 7. To save this new Ad hoc Search, click Save this search? .

Step 8. Enter Name

Step 9. Click ☐ Make it the default search? if desired.

Step 10. To export the query results to Excel, click the Actions ⌄ button and Export results.

Step 11. To view specific details about a position, go to the end of the row, click Actions ⌄ and then View .

Step 12. You can view Summary or History .

Viewing a Posting – SHRA

Step 1. Select APPLICANT TRACKING ▾ from the drop down (upper right side of the screen).

Step 2. Select the Postings tab (across the top middle of the screen).

Step 3. Select the Posting type SHRA.

Step 4. Your default search will automatically execute.

Step 5. You can click Saved Searches ⌄, and select the desired one.

Step 6. You can create a new Ad hoc search by entering new search criteria Search or clicking More Search Options ⌄ to add columns or to select a specific Workflow State.

Once the search results are displayed at the bottom of the screen, you can move columns around, sort and delete columns by hovering over a column title and clicking an icon ‹› ^ ⌄ ✖ (to the right).

‹› = move the column to the left/right

^ ⌄ = sort ascending/descending

✖ = delete the column

Step 7. To save this new Ad hoc Search, click Save this search?.

Step 8. Enter Name ______.

Step 9. Click ☐ Make it the default search? if desired.

Step 10. To export the query results to Excel, click Actions ⌄ and Export results.

Step 11. To view specific details about a position, go to the end of the row, click Actions ⌄ and View. You then can view various folders based on your Current Group:

Summary | History | Applicants | Reports | Hiring Proposals | Associated Position Description

Summary – the full Posting Detail
History – Workflow, Notes and email history
Applicants – ability to search for Applicants and their review their applications
Reports – reports available for your Current Group
Hiring Proposals – ability to search and review Hiring Proposals
Associated Position Description – details of the Position Description for the Posting

Viewing an Application – SHRA

Step 1. Select APPLICANT TRACKING ▾ from the drop down (upper right side of the screen).

Step 2. Select the Postings tab (across the top middle of the screen).

Step 3. Select the SHRA posting type.

Step 4. Search for the desired Position Description (use more search options for added columns).

Step 5. At the end of the position row, click Actions ▾ and then View Applicants.

Step 6. To view one applicant, click Actions ▾ on that line and then View Application.

Step 7. To view all applications for that Position:

a. Click the ☐ to the left of the title row next to the name heading to select all applicants.

b. Click the Actions ▾ button above the Actions column on the right.

c. Select Download Applications as PDF.

d. Select the documents you want to view (Application Data, Resume, etc.) then click. Submit

e. A file will be generated which could take a while depending on the number of applicants.

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Changing an Applicant Workflow – SHRA

Step 1. Select APPLICANT TRACKING from the drop down (upper right side of the screen).

Step 2. Select the correct Current Group if authorized (Department Head, Dean, VC, etc.) Current Group: Department Head. You will receive a message indicating that you are now viewing as a member of the group you selected. Click the message box to close it.

Step 3. Select the Postings tab (across the top middle of the screen).

Step 4. Select the SHRA posting type.

Step 5. Search for the desired Position Description (use more search options for added columns).

Step 6. On the row of the position, click Actions and then View Applicants.

Step 7. To view one applicant, click Actions on that line and then click View Application.

Or- Applicants can also be processed in Bulk:

a. Click the ☑ to the left of the Top Column Heading

b. Click Actions

c. Under the BULK section in list, click Move in Workflow

d. Either change the status for all next to the **Change for all applicants** field

e. Or select a **New State** for each applicant

Step 8. After reviewing the applications, select Take Action On Job Application at the top right of the screen.

Step 9. Select the appropriate Workflow Action.

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Hiring Proposal Workflow – SHRA

The Posting must have the Applicant in the correct Workflow State (Recommend for Hire) before the Hiring Proposal can begin.

Note: *Before beginning the Hiring Proposal, change Current Group to your highest level so you can submit up to the next level.*

Step 1. Select APPLICANT TRACKING from the drop down (upper right side of the screen).

Step 2. Select the Postings tab (across the top middle of the screen).

Step 3. Select the SHRA type.

Step 4. Search for the desired Position Description (use more search options for added columns).

Step 5. On the row of the Position, click on the Title (far left).

Step 6. Click on the Applicants folder.

Step 7. Click on the Name of the applicant who is in the Recommend for Hire Workflow State.

Step 8. Click Start Hiring Proposal .

Step 9. Confirm the Posting by clicking the circle to the left of the Title and press Select Position Description.

Step 10. Complete the required fields on each section.

Note*:* *Clicking* Next >> *will save and move to the next section.*

Step 11. After completing all sections, you will be on the Hiring Proposal Summary page. Verify that each section is valid by the ✔ on the left. If a section is not valid, click Edit to fix it.

Step 12. When you are satisfied all data is valid, click Take Action On Hiring Proposal.

Step 13. Select the appropriate workflow action based on your Current Group (submit to your supervisor).

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Viewing Inbox

Step 1. Select POSITION MANAGEMENT or APPLICANT TRACKING from the drop down (upper right of screen).

Step 2. Click Inbox (top right of the screen).

Step 3. Click the appropriate tab to see your available actions Postings Hiring Proposals Position Actions.

Step 4. If you have actions, on the row of the desired record, click Actions and then click View.

Step 5. After you validate the fields, click Take Action and select the desired workflow action. If the Posting is in the Hiring Proposal state, you will have the option to Take Action On Hiring Proposal.

<u>Note:</u> *The Actions will vary based on the Position or Posting user and workflow state.*

Viewing Watch List

Step 1. Select POSITION MANAGEMENT or APPLICANT TRACKING from the drop down (upper right side of screen).

Step 2. Click Watch List (top right of screen).

Step 3. A list of Postings, Hiring Proposals and Position Actions you have checked to watch will be displayed.

Step 4. If you have actions, on the row of the desired record, click Actions (to the left).

a. For Postings: select View Posting or Stop Watching Posting.

b. For Positions Actions: select Show Position Action or Stop Watching Position Action.

c. For Hiring Proposals: select Show Hiring Proposal or Stop Watching Hiring Proposal

Step 5. If you select to View or Show, you can then validate the fields, click Take Action, and select the desired workflow action.

<u>Note</u>*: If your Position or Posting is no longer in your Watch List because of the workflow status, you can still use the Viewing Quick Steps on pages 4, 5, and 6.*

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Saving a Search

Step 1. Select POSITION MANAGEMENT or APPLICANT TRACKING from the drop down (upper right of screen).

Step 2. Change to the desired Current Group (Data Entry, Supervisor, etc.). Current Group: Data Entry. You will receive a message indicating that you are now viewing as a member of the group you selected. Click the message box to close it.

Step 3. Select the desired action (Position Descriptions if you chose Position Management or Postings/Hiring Proposals if you chose Applicant Tracking) and select the type from the list (SHRA, EHRA Non Faculty, etc.).

a. ***Note***: *SHRA Position Actions or EHRA Position Actions will display all positions with an action whereas SHRA or EHRA shows only those approved.*

Step 4. Create a new search:

a. Enter your desired keyword and click Search. Your results will display at the bottom of the screen.

b. Click More Search Options to add more columns and set defaults.

c. From the Add Column drop down list Add Column you can select columns to add to the search results. Add as many as desired.

d. If you are searching SHRA Position Descriptions or EHRA Non Faculty Position Descriptions, you can select a desired Department to create a departmental search.

e. You can now move columns around into desired positions (or even delete if not needed):

1. To move a column, hover over the column at the bottom of the screen.
2. There are several choices: < > ^ v ✖
   1) < > = move the column to the left/right
   2) ^ v = sort ascending/descending
   3) ✖ = delete the column

f. Notice this search folder is temporarily called Ad hoc Search. To save it, click Save this search?.

g. Click ☐ Make it the default search? if desired.

h. Provide a search name Name.

i. Click Save this Search.

Step 5. You can open a Saved Search by hovering over Saved Searches and selecting from the drop down list. (Saved searches apply to the type of search you are performing and the Current Group you have selected.) You can then modify the saved search and save it with a new name if desired.

Step 6. To export the query results to Excel, click Actions and Export results.