AppState Careers
Quick Steps – EHRA Non Faculty Staff

This manual is designed to provide an overview and Quick Steps to process AppState Careers Positions and Hire (formerly Applicant Tracking) modules for EHRA Non Faculty Staff.

Tip for Navigation: <u>Positions</u> (Descriptions & Actions) – look for orange ribbon bar. <u>Hire</u> (Postings, Applicant Tracking, Hiring Proposals) – look for blue ribbon bar.

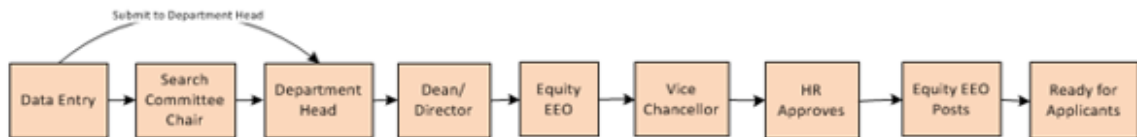<u>This manual provides Quick Steps for:</u>

Note: Postings for EHRA Non Faculty Staff are created by Employment Office.

Creating a New Position Description – EHRA Non Faculty Staff

Step 1. Select **Position Management** from the **•••** drop down (upper left side of the screen).

Step 2. Select the correct User Group (upper right side of the screen) (Search Committee Chair, Department Head, Hiring Manager, etc.).

User Group:

Search Committee Chair ▾

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

Step 4. Select the position type = EHRA Non Faculty Staff.

Position Descriptions ▾

SHRA Staff
SHRA Staff Position Actions
EHRA Non Faculty Staff
EHRA Non Faculty Staff Positi

Step 5. Click **+ Create New Position Description** if creating a New Position (right side of screen).

Step 6. 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.
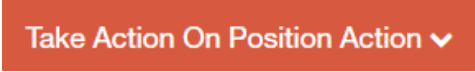 b. If not cloning, enter the Position Title, Division and Department.

Step 7. Click **Start Position Action** .

Step 8. Complete the required fields in each section beginning with *Position Justification*:

Editing Position Action
- Position Justification
- ⊘ Position Details
- ⊘ ADA Compliance Checkl…
- Position Budget Inform…
- ⊘ Employee
- ⊘ Supervisor
- ⊘ Separation Notice
- ⊘ Additional Position Do…
- ⊘ Waiver Request
- Posting Information
- ⊘ Supplemental Questions
- ⊘ Applicant Documents
- ⊘ HR Analyst Notes
- ⊘ (HISTORICAL) Essential…
- Position Action Summary

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

Step 9.   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 10.   When you are satisfied all data is valid, click **Take Action On Position Action ⌄** .

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

Step 12.   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.***

Modifying a Position Description – EHRA Non Faculty Staff

Step 1. Select **Position Management** from the **•••** drop down (upper left side of the screen).

Step 2. Select the correct User Group (upper right side of the screen) (Search Committee Chair, Department Head, Hiring Manager, etc.).

User Group:

Search Committee Chair ▼

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

Position Descriptions ▼   Classifica

SHRA Staff
SHRA Staff Position Actions
EHRA Non Faculty Staff
EHRA Non Faculty Staff Position Actions
Faculty
Faculty Position Actions

Step 4. Select EHRA Non Faculty Staff.

Step 5. On the row of the desired position, click select the desired action:
1. Start Action on Position Description
2. Update Supervisor
3. Separation Notice (if only separating but not ready to request to post)

Step 6. Click Start

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

Editing Position Action
Position Justification
Position Details
ADA Compliance Checkl...
Position Budget Inform...
Employee
Supervisor
Separation Notice
Additional Position Do...
Waiver Request
Posting Information
Supplemental Questions
Applicant Documents
HR Analyst Notes
(HISTORICAL) Essential...
Position Action Summary

Step 8. Make the desired modifications and click [Save] or click Next.

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 Action ⌄] .

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.**
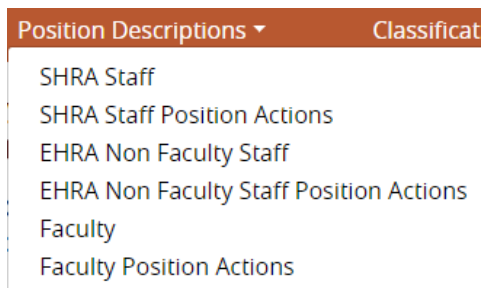
> ***Notes:***
> o *If a position has not yet been approved, the level where approval is waiting is the only user who can Edit or submit for approval.*
>
> o *Changes to a position will not be made to open Postings.*

Viewing a Position Description/Action – EHRA Non Faculty Staff

Step 1. Select **Position Management** from the **•••** drop down (upper left side of the screen).

Step 2. Select the **Position Descriptions** tab (across the top middle of the screen) and select appropriate position type.

Step 3. Select EHRA Non Faculty Staff for approved positions. Select EHRA Non Faculty Staff Position Actions to view pending actions or approved actions.

Position Descriptions ▾   Classificat
    SHRA Staff
    SHRA Staff Position Actions
    EHRA Non Faculty Staff
    EHRA Non Faculty Staff Position Actions
    Faculty
    Faculty Position Actions

Step 4. Your default search will automatically execute.

Step 5. You can click **Saved Searches ✔** for other saved searches other than default.

Step 6. You can create a new Ad Hoc search by entering new search criteria _____ **Search** or clicking **Q More Search Options ✔** to add columns or to select a specific Workflow State.

Step 7. 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).
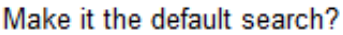
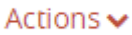   = move the column to the left/right

    = sort ascending/descending

    = delete the column
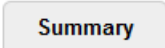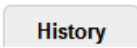
Step 8. To save this new Ad Hoc Search, click Save this search? .

Step 9. Enter Name [   ]

Step 10. Click ☐ Make it the default search? if desired.

Step 11. To export the query results to Excel, click the Actions ⌄ button and Export results

Step 12. To view specific details about a position, click Actions ⌄ and then View on that row.

Step 13. You can view Summary , History , or other options.

Viewing a Posting – EHRA Non Faculty Staff

Step 1. Select [Applicant Tracking System] from the [...] drop down (upper left side of the screen).

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

Postings ▾   Pools
- SHRA Staff
- EHRA Non Faculty Staff
- Faculty
- Adjunct
- Temporary
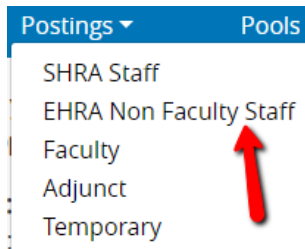
Step 3. Select the Posting type EHRA Non Faculty Staff.

Step 4. Your default search will automatically execute.
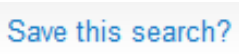
Step 5. You can click [Saved Searches ✓], and select the desired one.

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.

Step 7. 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

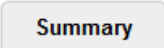**Step 8.** To save this new Ad hoc Search, click [Save this search?] .

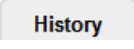**Step 9.** Enter Name [_____] .

Step 10. Click ☐ Make it the default search? if desired.

Step 11. To export the query results to Excel, click **Actions ⌄** and Export results .

Step 12. To view specific details about a position, go to the end of the row, click Actions ⌄ and then View Posting .
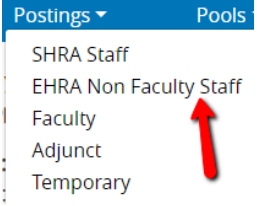
Step 13. You can view Summary , History , or other options.

Viewing an Application – EHRA Non Faculty Staff
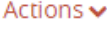
Step 1. Select [Applicant Tracking System] from the [...] drop down (upper left side of the screen).

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

Postings ▼   Pools

SHRA Staff
EHRA Non Faculty Staff
Faculty
Adjunct
Temporary

Step 3. Select the Posting type EHRA Non Faculty Staff.

Step 4. **Search** for the desired Posting (use more search options for added columns).

Step 5. At the end of the posting 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.

   Note: A list of applicants can be exported by clicking Actions ✔ *then click* Export results :

Changing an Applicant Workflow – EHRA Non Faculty

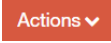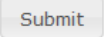**Step 1.** Select ![Applicant Tracking System] from the ![...] drop down (upper left side of the screen).

Step 2. Select the correct User Group (upper right side of the screen) (Search Committee Chair, Department Head, Hiring Manager, etc.).

User Group:

Search Committee Chair ▼

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

Step 4. Select the EHRA Non Faculty Staff posting type.

Step 5. **Search** for the desired Position Description (use more search options for added columns).
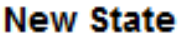
Step 6. On the row of the position, click **Actions ∨** and then **View Applicants** .
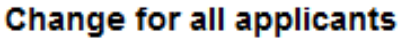
Step 7. To view one applicant, click **Actions ∨** on that line and then click **View Application** .

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

Step 9. Select the appropriate Workflow Action for the application.

-Or- Applicants can also be processed in Bulk (Use Search to filter workflow states):

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

   ii. Click **Actions ∨**

   iii. Under the **BULK** section in list, click **Move in Workflow**

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

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

   vi. Save Changes

Examples of Workflow Movement:

Step 1 – "Qualified", "Search Committee Det'd not Qualified" (helpful in initial screening stages)

Step 2 – "Select for Phone Interview", "Phone Interviewed", "Finalist"

Step 3 (on-campus interview or final phone interview) – "Selected for Interview – Requires Compliance/EEO Approval" <u>(This step required for all on-campus interviews, or if no on-campus interview - for the final phone interview)</u>. Once Equity Review is completed, HR will move candidate in workflow to "On-Campus Interview Pending"/"On Campus Interview".

Step 4 – Selected candidate for hire moved to "Recommend for Hire". All others moved to "Not Hired" (several options to choose from depending on process of candidate), *or "Search Committee Det'd not Qualified".*

Hiring Proposal Workflow – EHRA Non Faculty

Step 1. Select **Applicant Tracking System** from the **•••** drop down (upper left side of the screen).
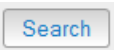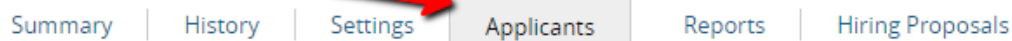
Step 2. Select the **Postings** tab (across the top middle of the screen).

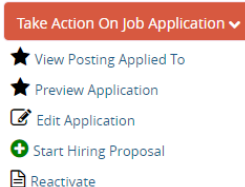**Step 3.** Select the EHRA Non Faculty Staff Posting type.

Step 4. **Search** for the desired Posting (use more search options for added columns).

Step 5. On the row of the Posting, click on the title (far left).

Step 6. Click on the **Applicants** tab.

| Summary | History | Settings | Applicants | Reports | Hiring Proposals |

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

Take Action On Job Application ✔
★ View Posting Applied To
★ Preview Application
✎ Edit Application
⊕ Start Hiring Proposal
▤ Reactivate

Step 8. Click ⊕ **Start Hiring Proposal** on the right side of the screen.

Note: If you do not see "Start Hiring Proposal, verify your user group is correct. The user group must be the hiring authority's highest level user group.

Step 9. Verify the Hiring Proposal is connected to the correct Position Description. Select **Select Position Description**

Step 10. Complete the required fields on each section.

✔ Hiring Proposal
✔ Funding
✔ Waiver Request
✔ Hiring Proposal Documents
✔ Notes
Hiring Proposal Summary

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 action under "Move Directly To…" based on your Current Group:

MOVE DIRECTLY TO...
Hiring Manager
Department Head
Dean/Director
Compliance/EEO
Vice Chancellor

Viewing Inbox for Quick Access

Step 1. Select **Position Management** or **Applicant Tracking System** from the **...** drop down (upper left of screen).

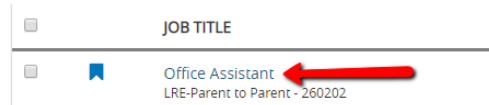**Step 2.** Scroll on main screen of Positions or Hire to locate "Inbox" section.

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

Step 4. To access, click on the job title (far left).

JOB TITLE

Office Assistant
LRE-Parent to Parent - 260202

Add to Watch List

Step 1. Access position, hiring proposal, etc., and click "Add to Watch List" in upper right hand corner of position page.

Viewing Watch List

Step 1. Select **Position Management** or **Applicant Tracking System** from the **...** drop down (upper left side of screen).

Step 2. Scroll on main screen of Positions or Hire to locate "Watch List" section.

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

JOB TITLE

Office Assistant
LRE-Parent to Parent - 260202

Step 4. To access, click on the job title (far left).

Note: *To unfollow click the* ☑ *beside the job you wish to unfollow and click* [Unwatch Postings] *(right side of Watch List section).*
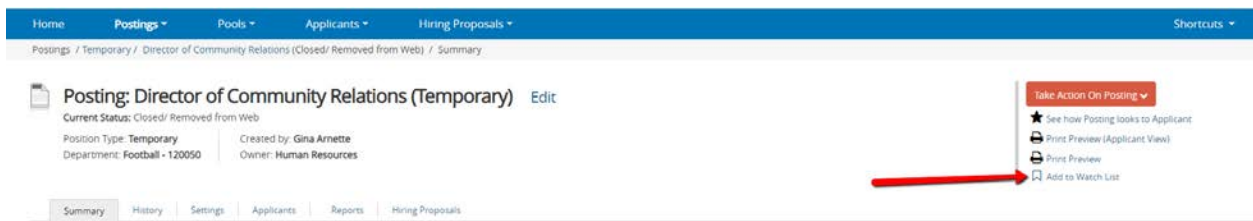
Saving a Search

Step 1. Select [Position Management] or [Applicant Tracking System] from the [...] drop down (upper left of screen).

Step 2. Select the correct User Group (upper right side of the screen) (Search Committee Chair, Department Head, Hiring Manager, etc.).

User Group:

Search Committee Chair ▼
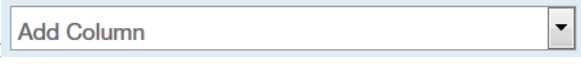
Step 3. Select the desired action (Position Descriptions if you chose Positions or Postings/Hiring Proposals if you chose Hire) and select the type from the list (EHRA Non Faculty Staff, etc.).

   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 [Q 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:

         1)   = move the column to the left/right

         2)   = 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. Complete Saved Search criteria including – "Name of Search, Type of Search Access, and make default if desired).

h. Click ☐ **Make it the default search?** if desired.

i. Click **Save this Search** .

Note: You can modify a saved search and save it with a new name if desired - choose "Overwrite Saved Search" by selecting the saved search you wish to replace.

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.)

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