

AppState Careers

Quick Steps – SHRA

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

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

This manual provides Quick Steps for:

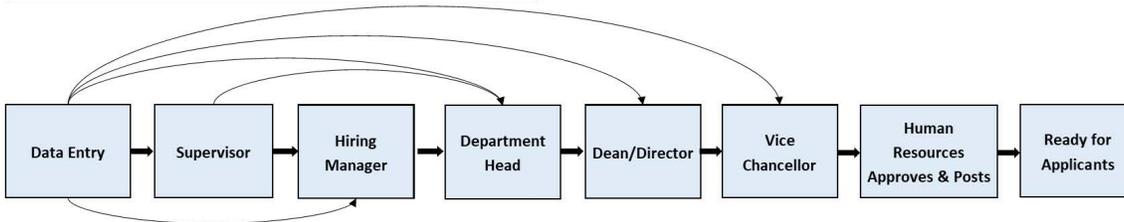
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Workflow - SHRA

1

Position/Posting Workflow

Positions will be updated and approved at each level and then the Position can be **Posted** by HR.



2

Applicant Workflow

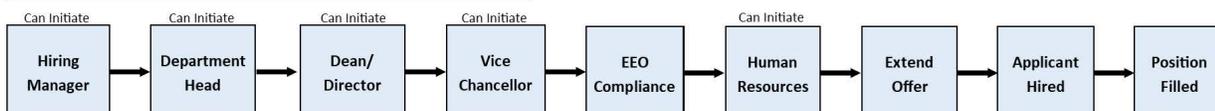
Applicants apply to the Posting via the Web Portal. All applicants create an account and upload pertinent documents.



3

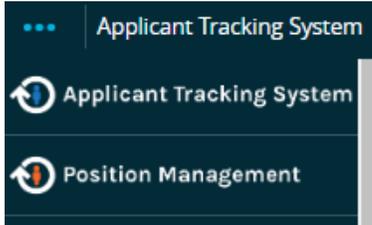
Hiring Proposal Workflow

Once successful candidate is at 'Recommend for Hire', hiring Authority can begin the Hiring Proposal.



Creating a New Position Description – SHRA

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



Step 2. Select the correct User Group if authorized (Data entry, Department Head, Hiring Manager, etc.)

User Group:

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-SHRA Staff tab (top middle of the screen)



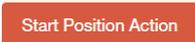
Step 4. Click the orange box on the right side of the screen to create a New Position.



Step 5. Note that you can *Clone an existing Position Description* or create a *New Position Description*:

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

Step 6. Click Start Position Action



Step 7. Complete the required fields in each section beginning with *Position Justification*:

Editing Position Action	
<input checked="" type="checkbox"/>	Position Justification
<input checked="" type="checkbox"/>	Classification Profile
<input checked="" type="checkbox"/>	Position Details
<input checked="" type="checkbox"/>	ADA Compliance Checklist
<input checked="" type="checkbox"/>	Core Competencies
<input checked="" type="checkbox"/>	Functional Competencies
<input checked="" type="checkbox"/>	Overall Competency Level
<input checked="" type="checkbox"/>	Position Budget Inform...
<input checked="" type="checkbox"/>	Supervisory Position
<input checked="" type="checkbox"/>	Separation Notice
<input checked="" type="checkbox"/>	Additional Position Do...
<input checked="" type="checkbox"/>	Posting Information
<input checked="" type="checkbox"/>	Supplemental Questions...
<input checked="" type="checkbox"/>	Applicant Document
<input checked="" type="checkbox"/>	HR Analyst Notes
	Position Action Summary

Note: Clicking  will save each section.

Step 8. 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 9. When you are satisfied all data is valid, click .

Step 10. *Workflow Actions* will vary based on the Position and your User Group. Select the appropriate action.

Step 11. 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 - SHRA

Step 1. Select Position Management from the drop down box (upper left corner of the screen).



Step 2. Select the correct User Group if authorized (Data entry, Department Head, Hiring Manager, etc.) 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), then select SHRA Staff.



Step 4. Open up the desired position description and select the desired action (top right)

Take Action On Position Description ▾ ▾

- Print Preview
- Print Preview (Employee View)
- ★ View Supervisor
- ★ **Start Action on Position Description**(Actions Include: Update PD, Reclassification, Salary Request, Request to Post Vacancy & Separate Employee, Interim Appointment)
- ★ Update Supervisor
- ★ Separation Notice (Separate Employee If Not Requesting to Post Position)

- Start Action on Position Description
- Update Supervisor
- Separation Notice (if separating but not ready to request to post)

Step 5. Click Start

Step 6. Select the desired section to edit (from the menu on the left):



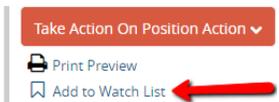
Step 7. Make the desired modifications and click  on the right side of the page.

Step 8. From the menu on the left, click on the Summary page .

Step 9. When you are satisfied all data is accurate, click .

Step 10. Workflow Actions will vary based on your User Group. Select the appropriate action.

Step 11. Add desired Comments and decide if you want to Watch this position status by selecting the



****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 is the only user who can Edit or submit for approval.
- (2) Changes to a position will not be made to open Postings.

Viewing a Position Description/Action – SHRA

Step 1. Select Position Management from the drop down (upper left corner 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 or approved 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 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

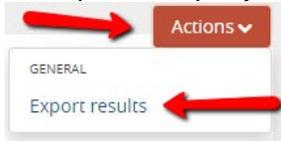
= delete the column

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

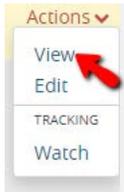
Step 8. Enter Name

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**.



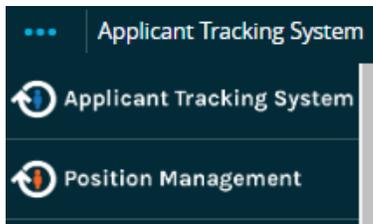
Step 11. To view specific details about a position, go to the end of the row, click **Actions** and then **View**.



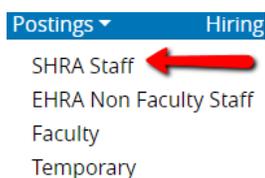
Step 12. You can view **Summary** or **History**.

Viewing a Posting – SHRA

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



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



Step 3. Your default search will automatically execute.

Step 4. You can click [Saved Searches](#), and select the desired one.

Step 5. 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

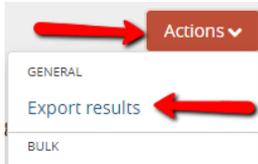
= delete the column

Step 6. To save this new Ad hoc Search, click [Save this search?](#)

Step 7. Enter ^{Name} .

Step 8. Click [Make it the default search?](#) if desired.

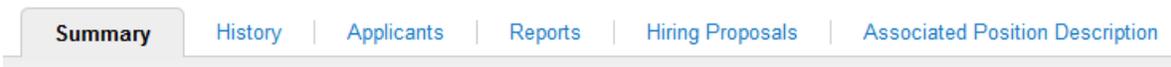
Step 9. To export the query results to Excel, click **Actions** and **Export results**.



Step 10. 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:

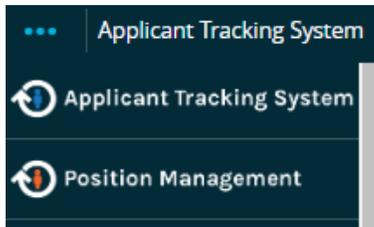


Summary – the full Posting Detail

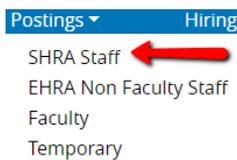
- History – Workflow, Notes and email history
- Applicants – ability to search for Applicants and their review their applications
- Reports – reports available for your Current Group
- Hiring Proposals – ability to search and review Hiring Proposals
- Associated Position Description – details of the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

Viewing an Application – SHRA

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



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

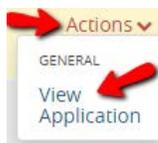


Step 3.  for the desired Position Description (use more search options for added columns).

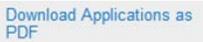
Step 4. At the end of the position row, click  and then .



Step 5. To view one applicant, click  on that line and then .

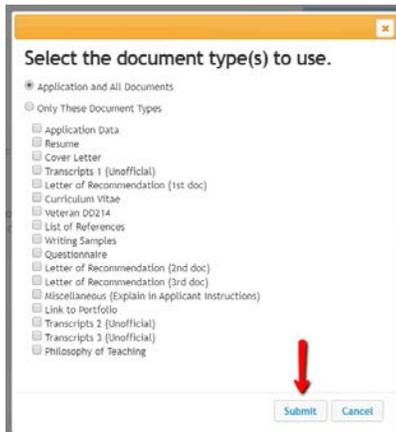


Step 6. To view all applications for that Position:

- Click the  to the left of the title row next to the name heading to select all applicants.
- Click the  button above the Actions column on the right.
- Select .

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

Submit

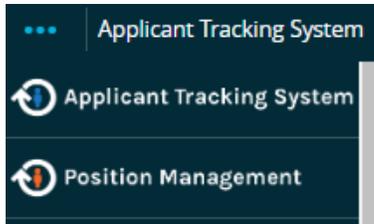


The image shows a dialog box titled "Select the document type(s) to use." with a close button (X) in the top right corner. It contains two radio buttons: "Application and All Documents" (which is selected) and "Only These Document Types". Below these are several checkboxes, each followed by a document type name: Application Data, Resume, Cover Letter, Transcripts 1 (Unofficial), Letter of Recommendation (1st doc), Curriculum Vitae, Veteran DD214, List of References, Writing Samples, Questionnaire, Letter of Recommendation (2nd doc), Letter of Recommendation (3rd doc), Miscellaneous (Explain in Applicant Instructions), Link to Portfolio, Transcripts 2 (Unofficial), Transcripts 3 (Unofficial), and Philosophy of Teaching. At the bottom right, there are "Submit" and "Cancel" buttons. A red arrow points down to the "Submit" button.

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

Changing an Applicant Workflow – SHRA

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



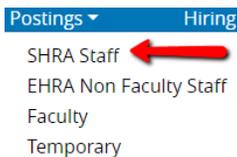
Step 2. Select the correct User Group if authorized (Department Head, Dean, VC, etc.).

User Group:

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-SHRA Staff tab (across the top middle of the screen).



Step 4. Select the SHRA posting type.

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

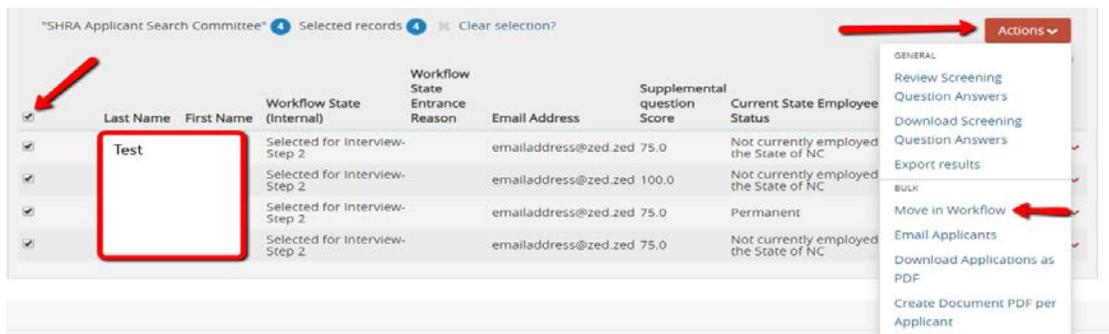
Step 6. On the row of the position, click and then .



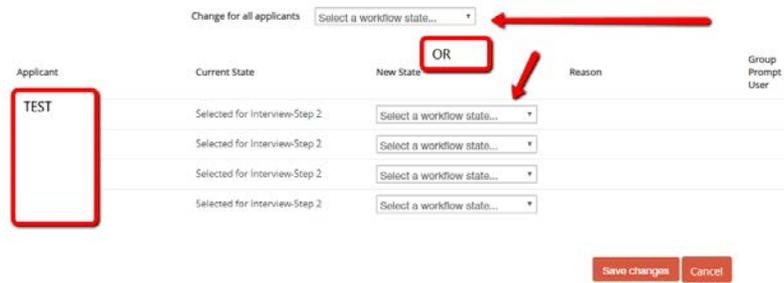


Step 7. To view one applicant, click **Actions** on that line and then click **View Application**.
 Or- Applicants can also be processed in Bulk:

- Click the to the left of the Top Column Heading
- Click **Actions**
- Under the **BULK** section in list, click **Move in Workflow**



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

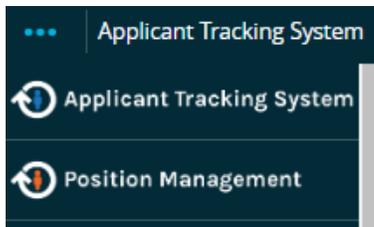
Step 9. Select the appropriate Workflow Action.

Hiring Proposal Workflow – SHRA

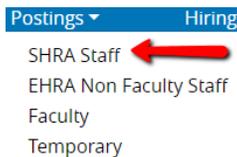
The Posting must have the Applicant in the correct Workflow State (Recommend for Hire) before the Hiring Proposal can begin.

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

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



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



Step 3.  for the desired Position Description (use more search options for added columns).

Step 4. On the row of the Position, click on the Title (far left).

Step 5. Click on the  folder.

Step 6. Click on the Name of the applicant who is in the Recommend for Hire Workflow State.

Step 7. Click .

Step 8. Confirm the Posting by clicking the circle  to the left of the Title and press .

Step 9. Complete the required fields on each section.

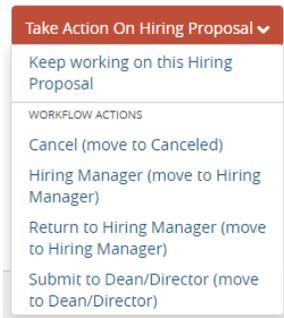


Note: Clicking  will save and move to the next section.

Step 10. 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.

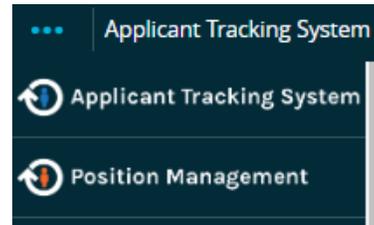
Step 11. When you are satisfied all data is valid, click .

Step 12. Select the appropriate workflow action based on your Current Group (submit to your supervisor).



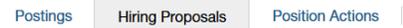
Viewing Inbox

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



Step 2. Locate your Inbox which will be about halfway down the screen on the left hand side.

Step 3. Click the appropriate tab to see your available actions

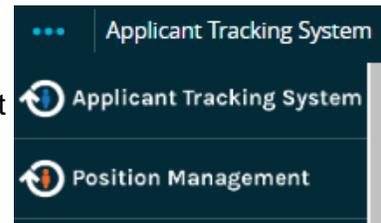


Step 4. If you have actions, on the row of the desired record, click on the job title.

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

Viewing Watch List

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



Step 2. Scroll until you see the Watch List box near the bottom of the page.

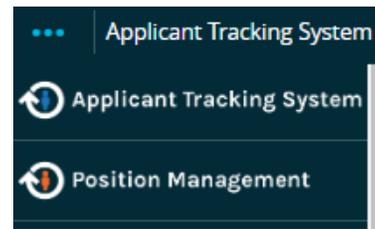
Step 3. A list of Postings, Hiring Proposals and Position Actions you have checked to watch will be displayed.

Step 4. Select the Job Title you wish to work on or select  to remove from Watch List.

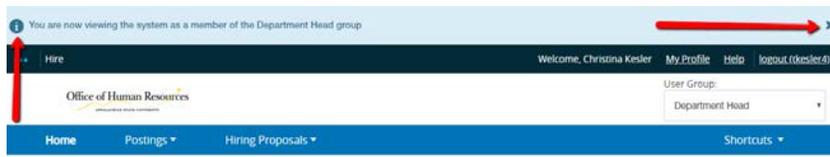
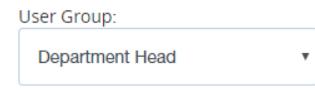
Note: *If your Position or Posting is no longer in your Watch List because of the workflow status, you can still use the Viewing Quick Steps on pages 4, 5, and 6.*

Saving a Search

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



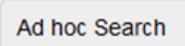
Step 2. Change to the desired User Group (Data Entry, Supervisor, etc.). You will receive a message indicating that you are now viewing as a member of the group you selected. Click the message box to close it.



Step 3. Select the desired action (Position Descriptions if you chose Positions or Postings/Hiring Proposals if you chose Hire) 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 Staff or EHRA Non Faculty Staff shows only those approved.

Step 4. Create a new search:

- a. Enter your desired keyword and click . Your results will display at the bottom of the screen.
- b. Click  to add more columns and set defaults.
- c. From the Add Column drop down list  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 . To save it, click .
- g. Click **Make it the default search?** if desired.

- h. Provide a search 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](#) .

