Login Page

- **See Chalkboard**
- This will take you to the login page

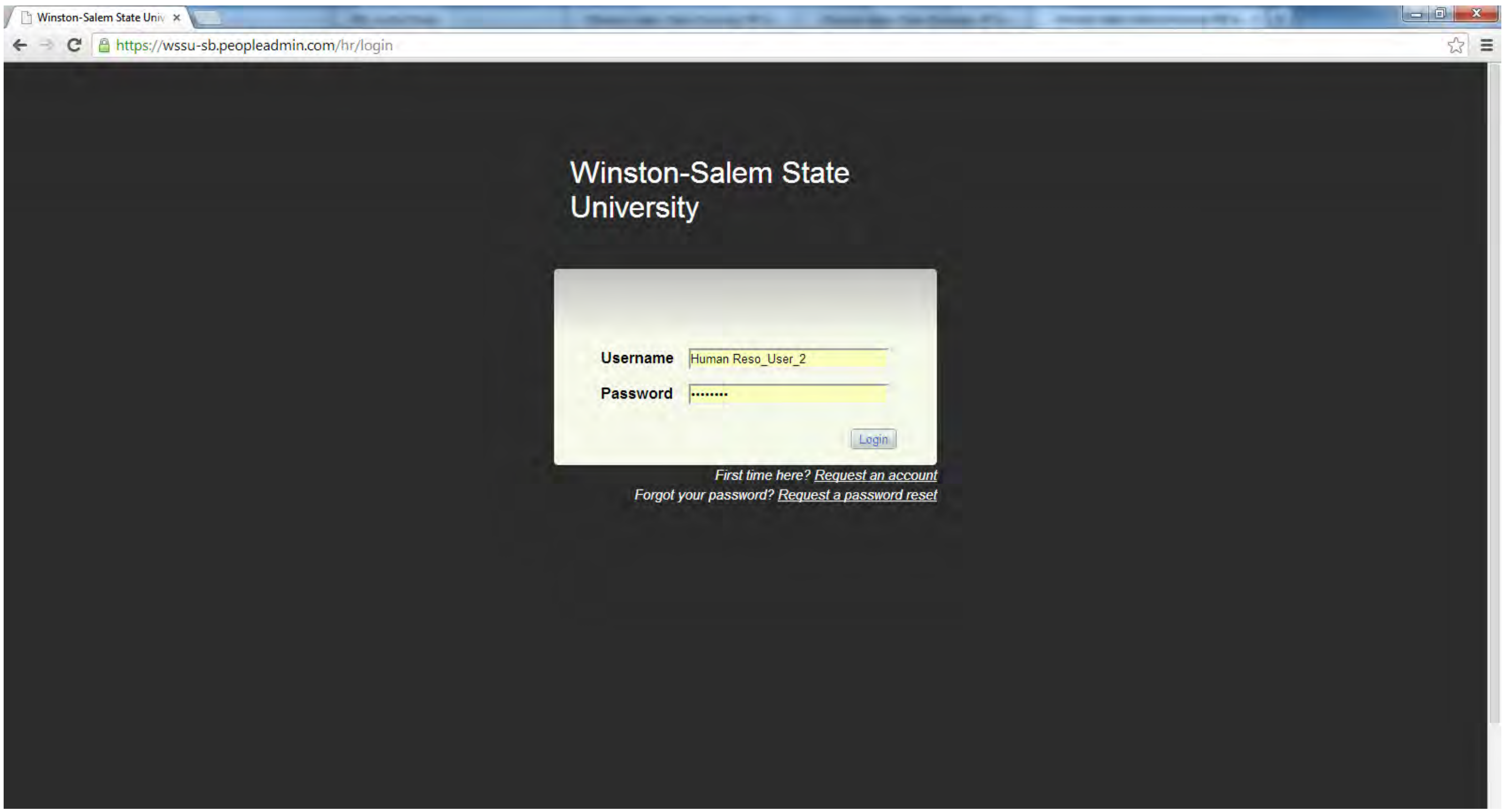

Fig 1: Login page for Winston-Salem State University

Login page

- Login with your University Windows account username and password.

- New users can request a new user account by pressing the *Request an account* link. This will put the user into pending status. The system will send an email to Administrator and Administrator will have to approve the user before they can login.

- If you forget your password, click the *Request a Password Reset* link and the system will email the user a link to reset their password. (This will not apply if you are using external authentication)

Home Page

When you log in, you will come to the Applicant Tracking home page. Depending on the user group you are logged into, you will see the menu options that correspond to your user permissions.

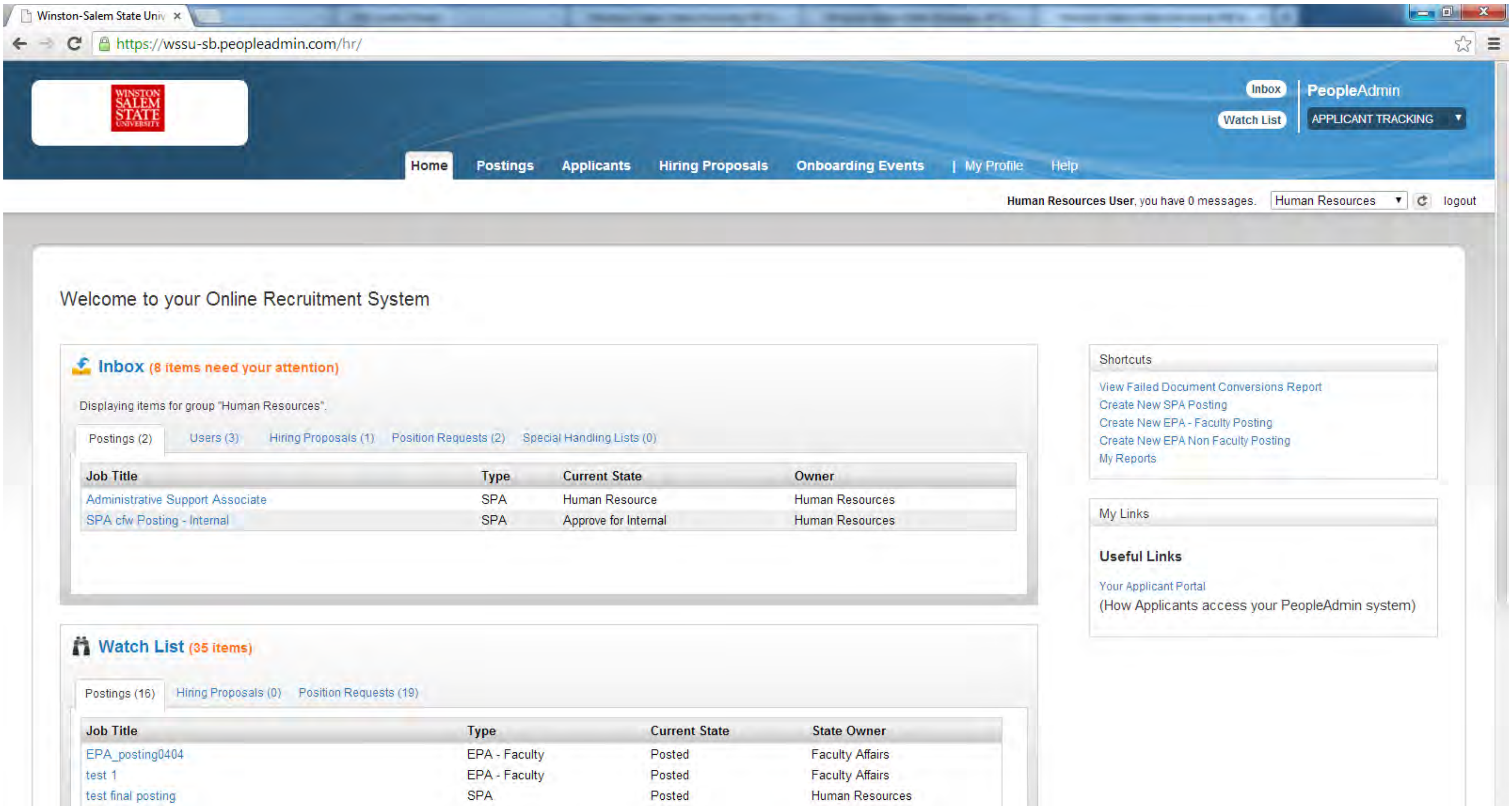

Fig 2: Applicant Tracking Home page

[User Drop Down]

This drop-down menu will only be available if you are assigned multiple User Groups, otherwise you will not have a drop-down available and you will simply be logged in as your default.

[Inbox]

The inbox is a notification area where the system will display any items that need you to take action upon.

[Watch List]

The watch list displays any item that you have flagged to be put on your watch list. We will see this later on in the demo.
(Note: The tabs that display for the Inbox and Watch List will depend on your user permissions. You can always quickly access these notification areas with the button at the top of the screen)

[Shortcuts]

The Shortcuts section will display shortcuts that depend on your user permissions. This is not a configurable area.

[My links]

The My Links section is a good resource for Training videos and quick access to the applicant portal. You can also quickly get to the MOPAC portal, where you have access to resources concerning the system.

[Module Selection]

At the top of the screen, you will see the module drop-down. If you hover your mouse over Applicant Tracking you will see the standard module options.

Position Management

Hover over the module selection drop-down menu and select *Position Management.*

[Position Descriptions]

Hover over the *Position Descriptions* tab and click the *appropriate position type* option.
This takes you into the Position Description list screen where you can create new position descriptions or manage existing position descriptions.

- **View/Edit existing Position Descriptions:** Hover over the *Actions* link and click *View.* From the summary screen you can click any of the *Edit* links to edit the position description (HR Only). The status of the Position Description can be changed by hovering over the orange *Take Action on Position Description* button and choosing a status.
  - **Create a New Position Description:** From the Position Descriptions search click orange *Create New Position Description* button. A box will pop up that asks you to "Choose the position request you would like to start." Select *New Position Description*

    [Initial Page]

    Enter the Proposed Position Title and select the Organizational Units for this position, click orange *Start Position Request* button. If you wish to clone an existing position description, select that position description in the position description search at the bottom of the screen. You can filter the results of the search using the *Filter these results* link that appears above the search results.

    [Classification Selection]

    Select the Classification that is associated with this position description. You can Filter the search results using the *Filter these results* link.

    [Additional Tabs]

    Position Justification, Budget, Supplemental Questions, Supervisory Position

    [Position Request Summary page]

    Move the Position Request forward by hovering over the orange *Take Action on Position Request* button and selecting *the next step in the workflow process*. Once you approve the Position Request, the Position Description will be created and available for use.

Create SPA Position Description

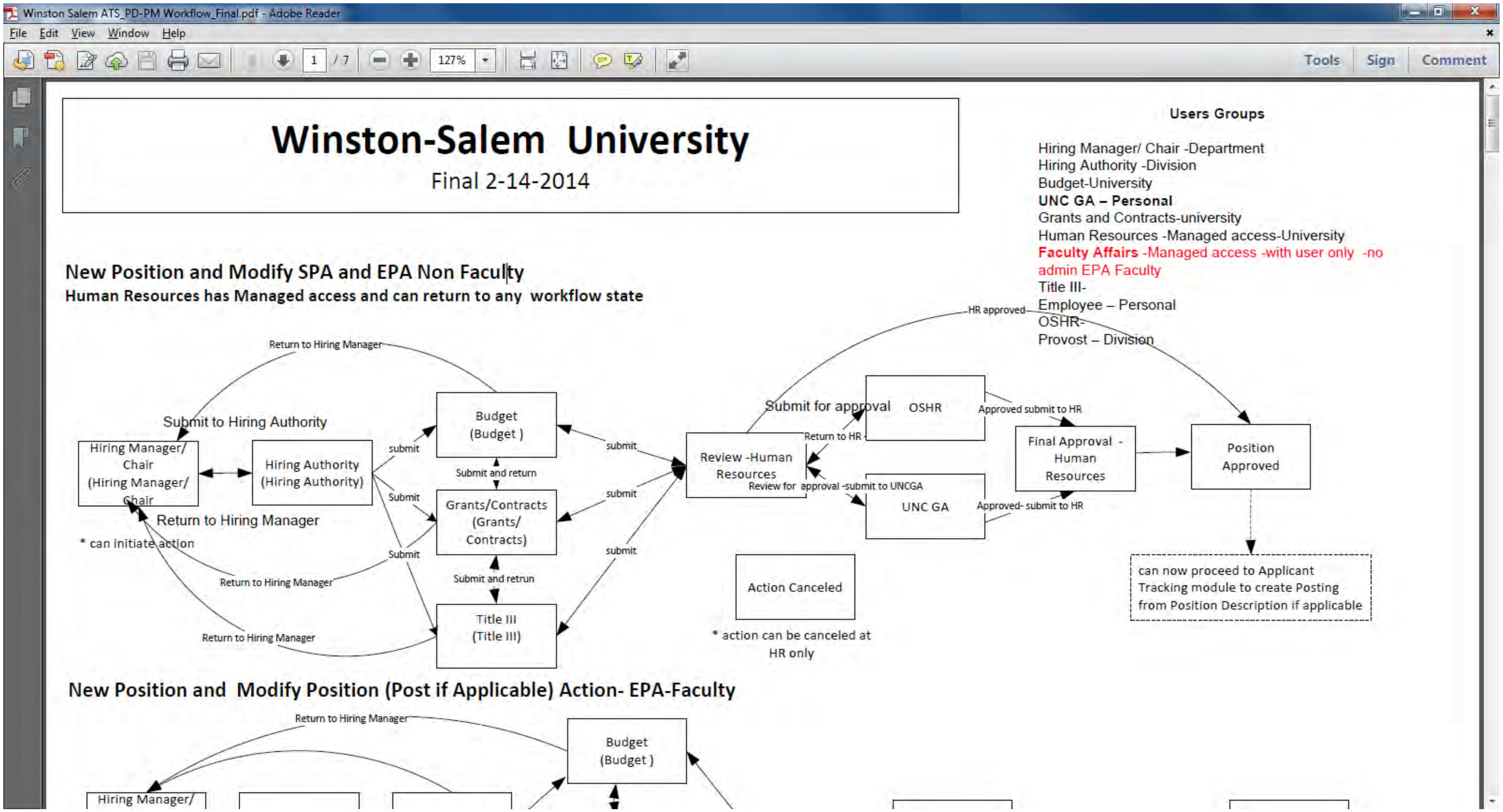

Fig 12: New SPA Position Description Workflow

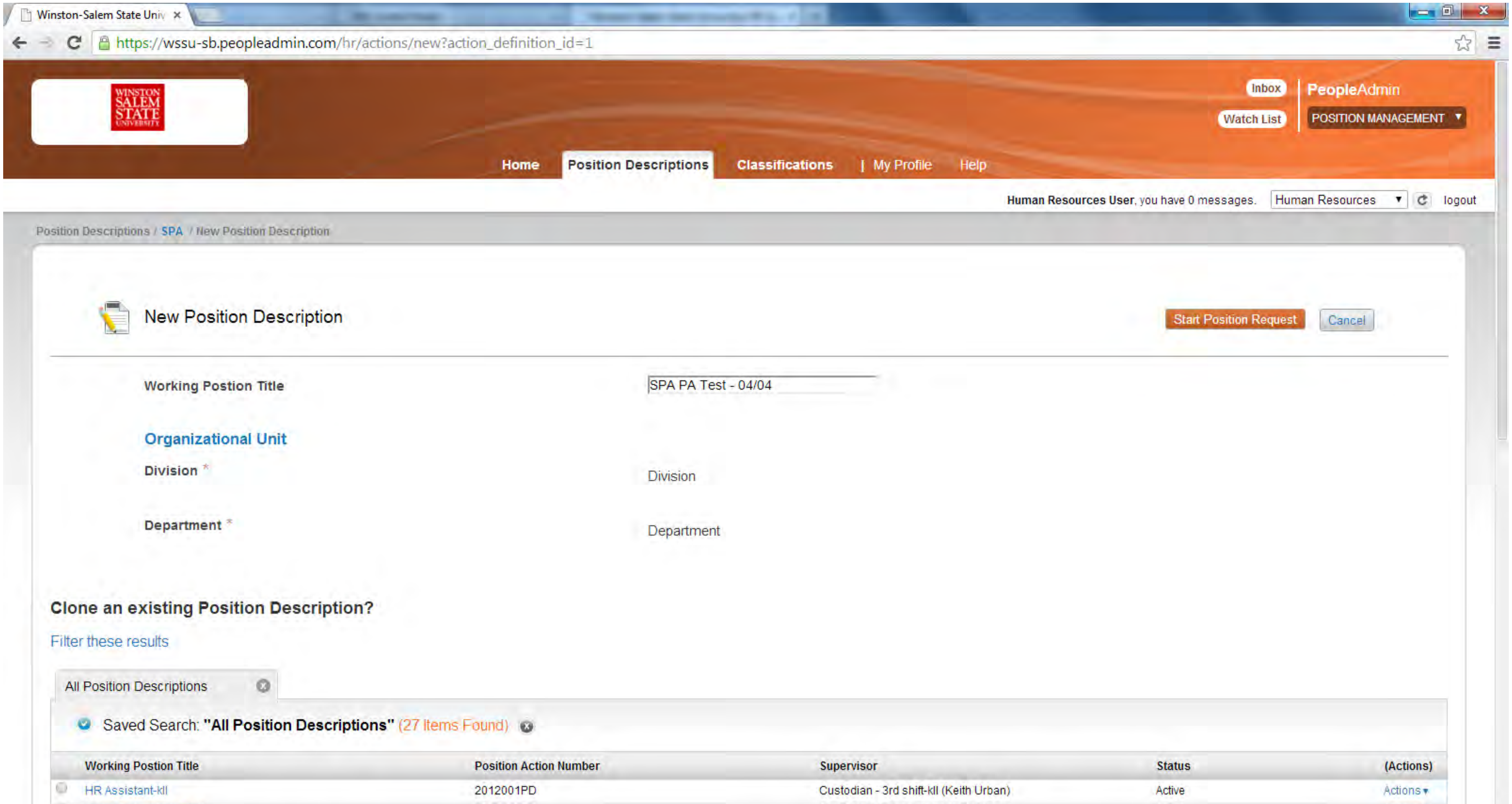

Fig 13: Initiate new SPA Position Description

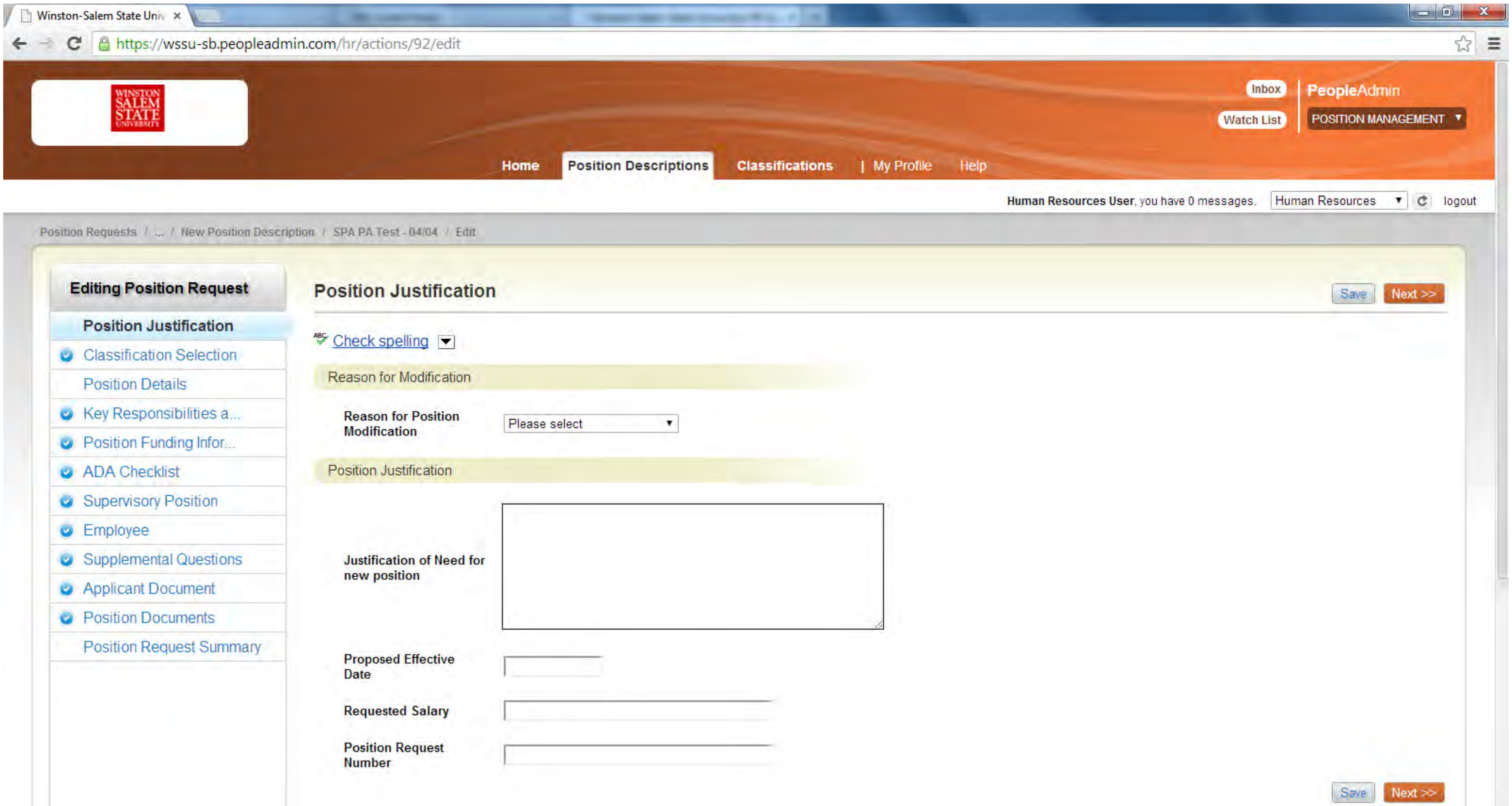

Fig 14: New SPA Position Description Details page

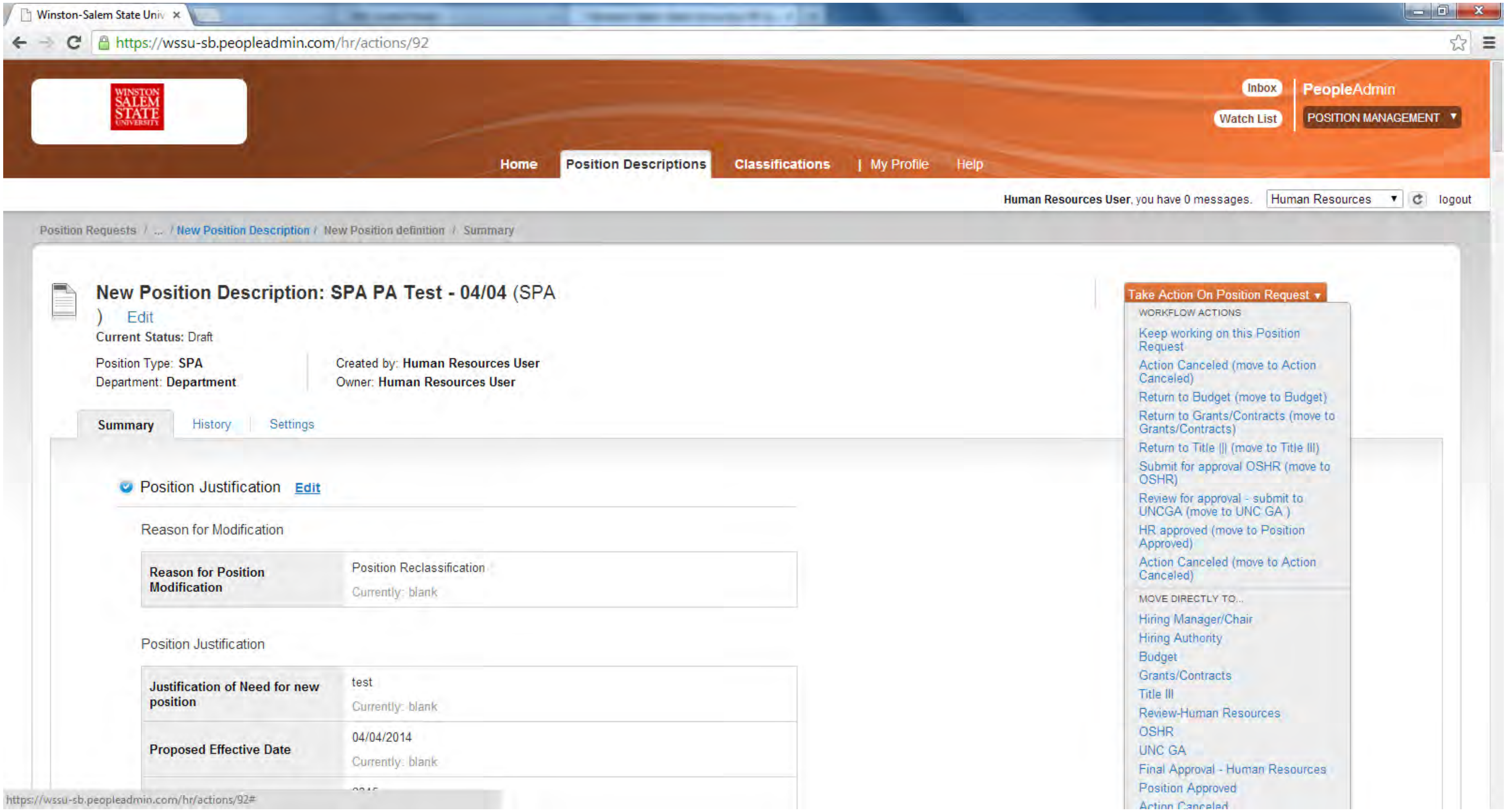

Fig 15: New SPA Position Description Summary page

[Workflow]

- To move the Position Description along in the workflow, hover over the orange *Take Action on Position Description* button and choose the action that you would like to take.

- ***When you transition the position description, you will have the opportunity to add a comment, which will appear in both the email that the state owner receives and in the history of the requisition. You can also flag it to appear on your watch list and this will display the requisition in the Watch List on your home screen.***

Create EPA - Faculty Position Description

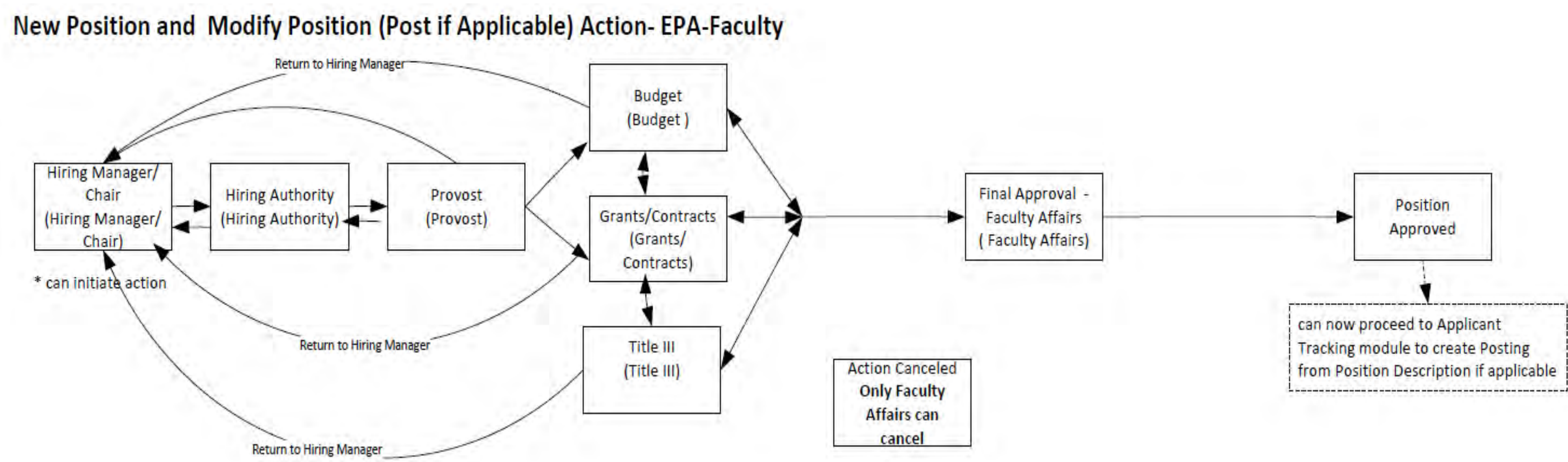

Fig 16: New EPA - Faculty Position Description Workflow

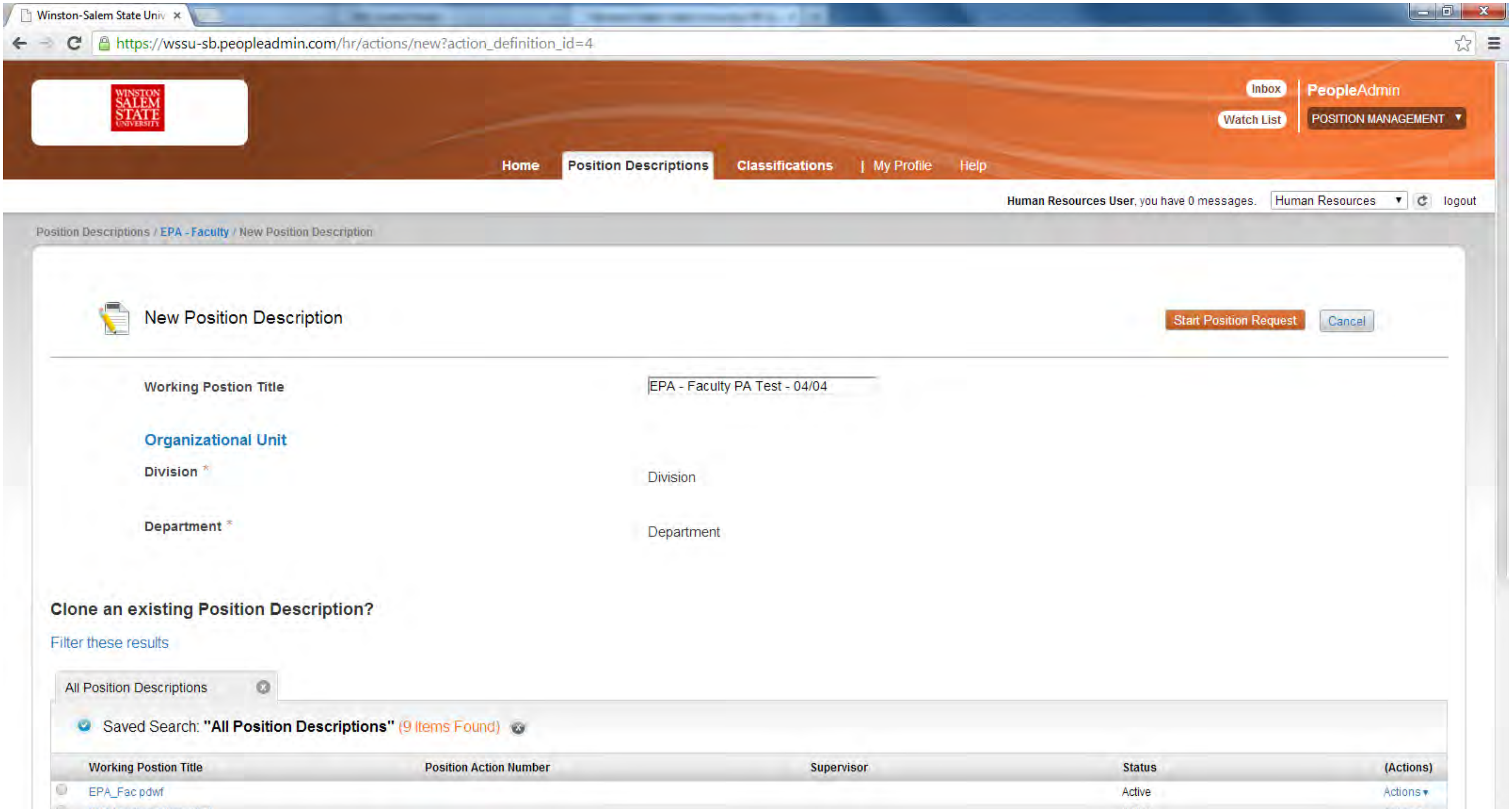

Fig 17: Initiate new EPA - Faculty Position Description

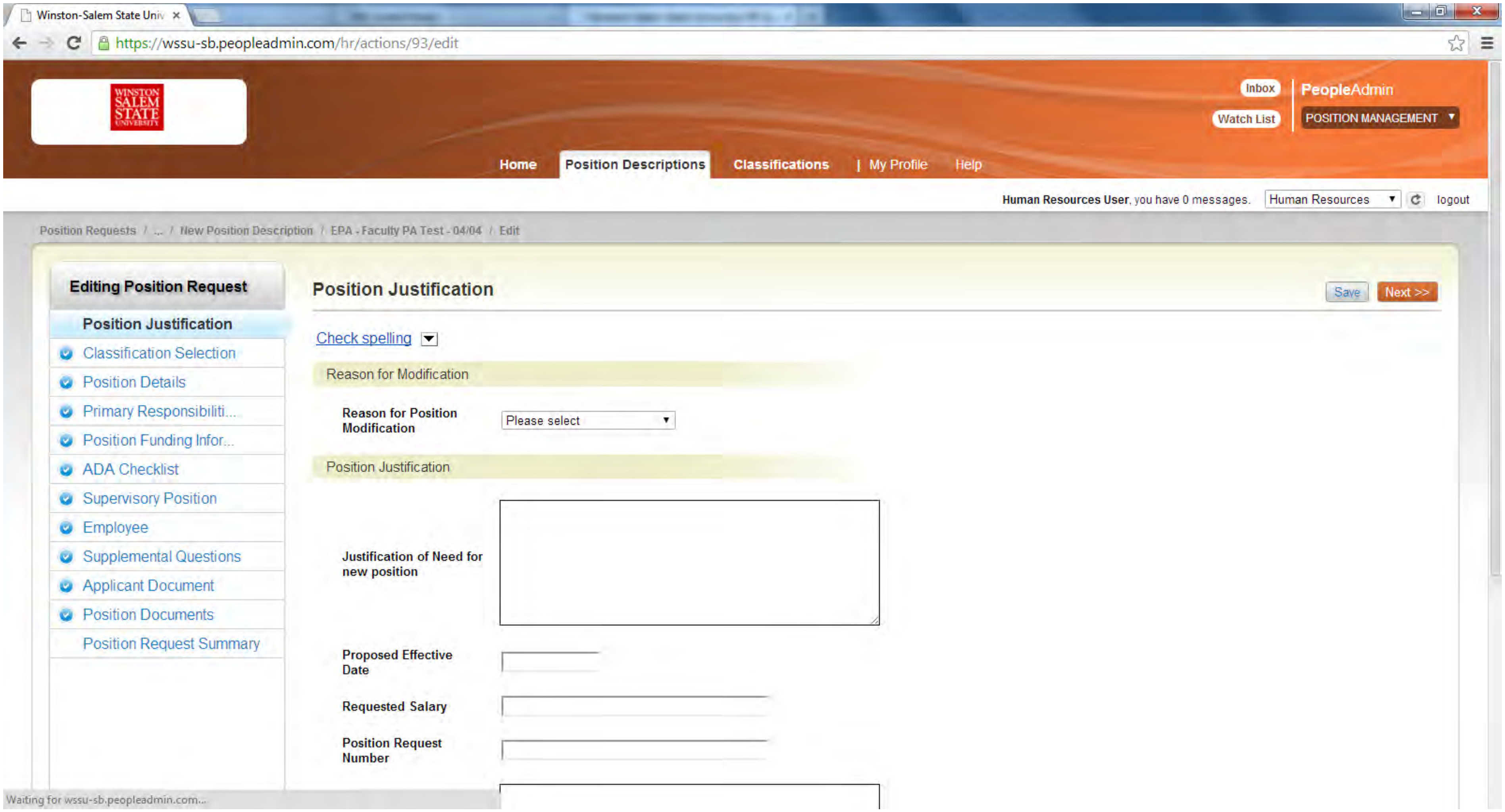

Fig 18: New EPA - Faculty Position Description Details page

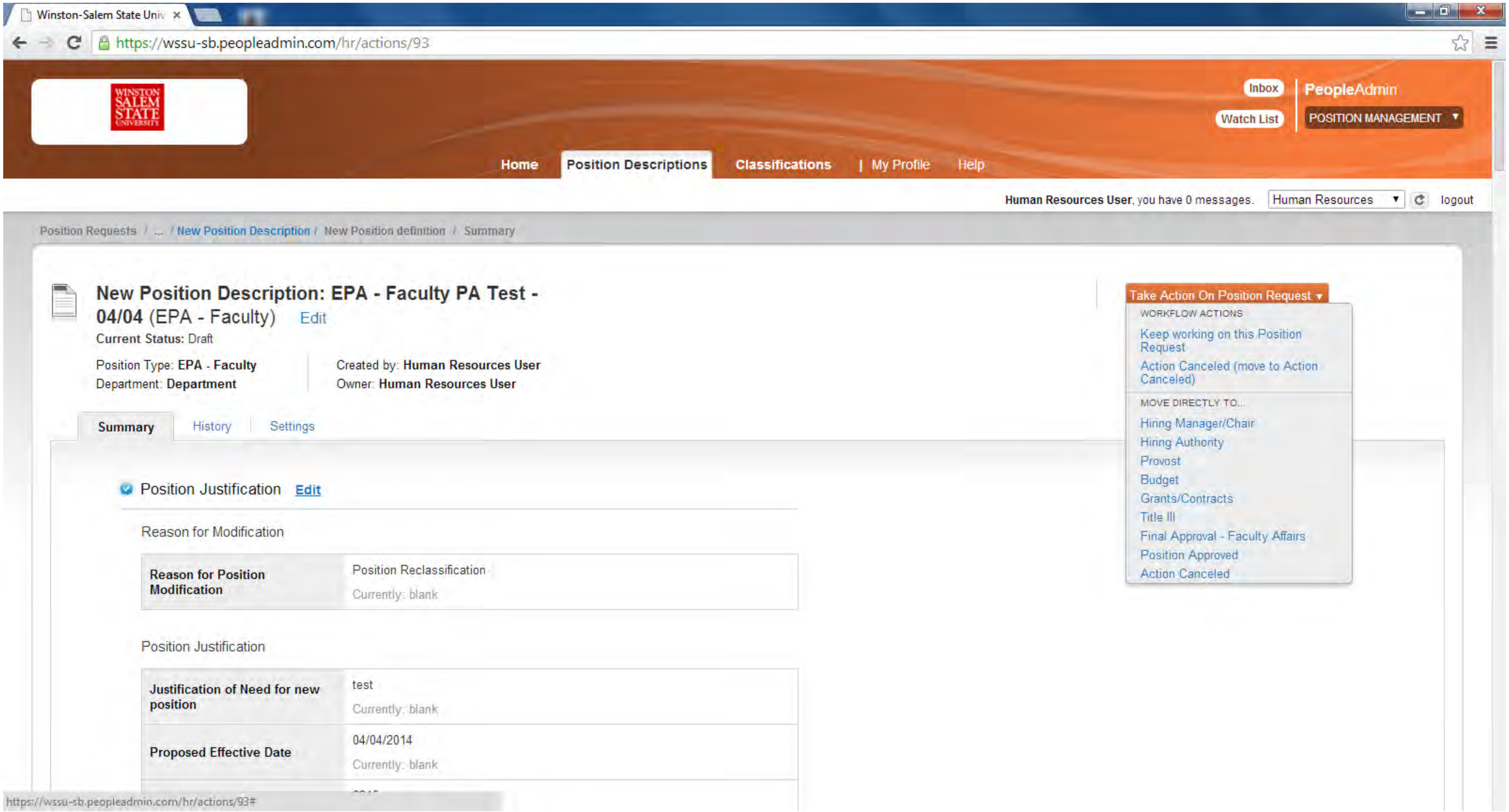

Fig 19: New EPA - Faculty Position Description Summary page

[Workflow]

- To move the Position Description along in the workflow, hover over the orange *Take Action on Position Description* button and choose the action that you would like to take.

- ***When you transition the position description, you will have the opportunity to add a comment, which will appear in both the email that the state owner receives and in the history of the requisition. You can also flag it to appear on your watch list and this will display the requisition in the Watch List on your home screen.***

Create EPA Non Faculty Position Description

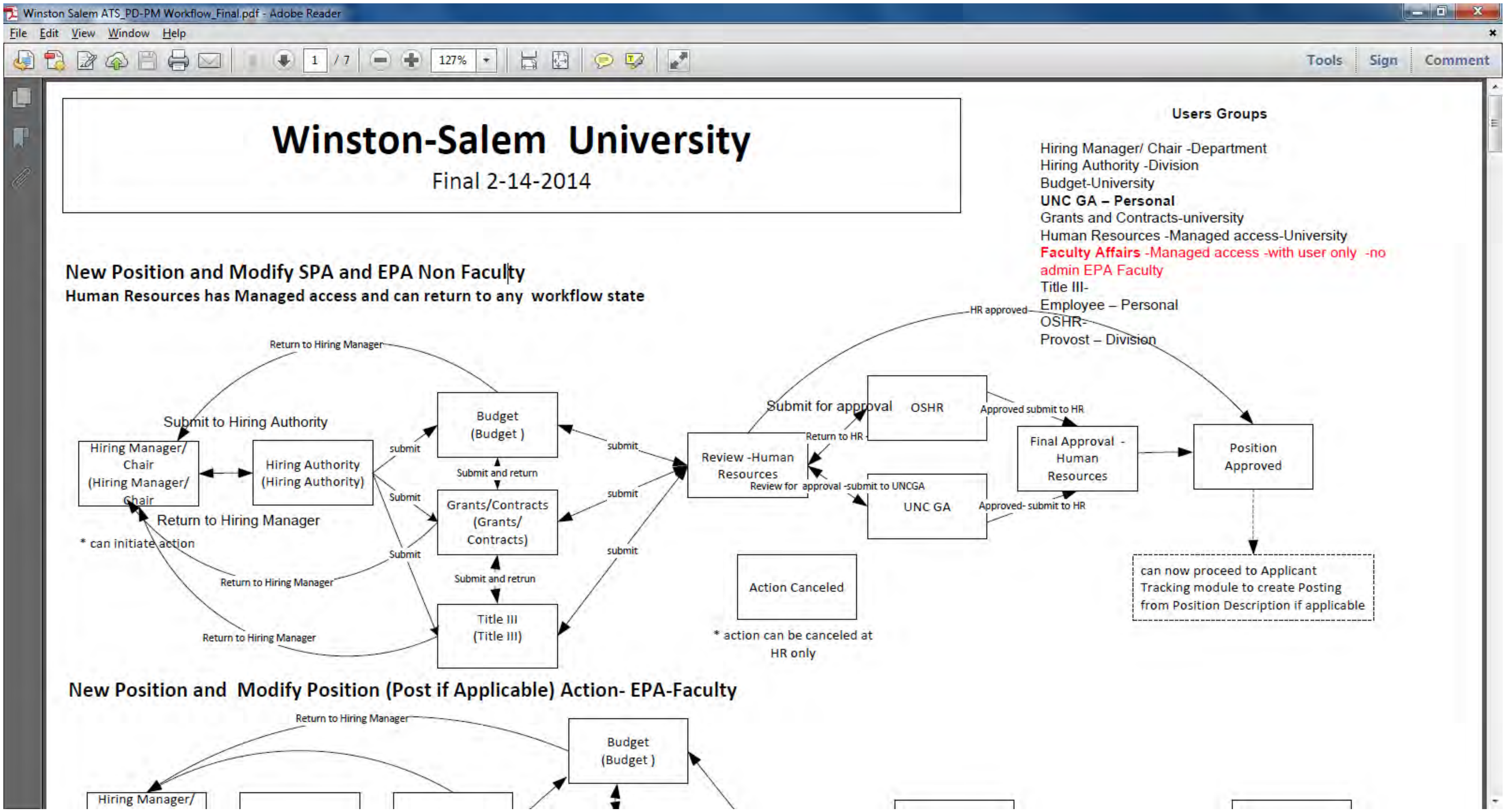

Fig 20: Initiate new EPA Non Faculty Position Description Workflow

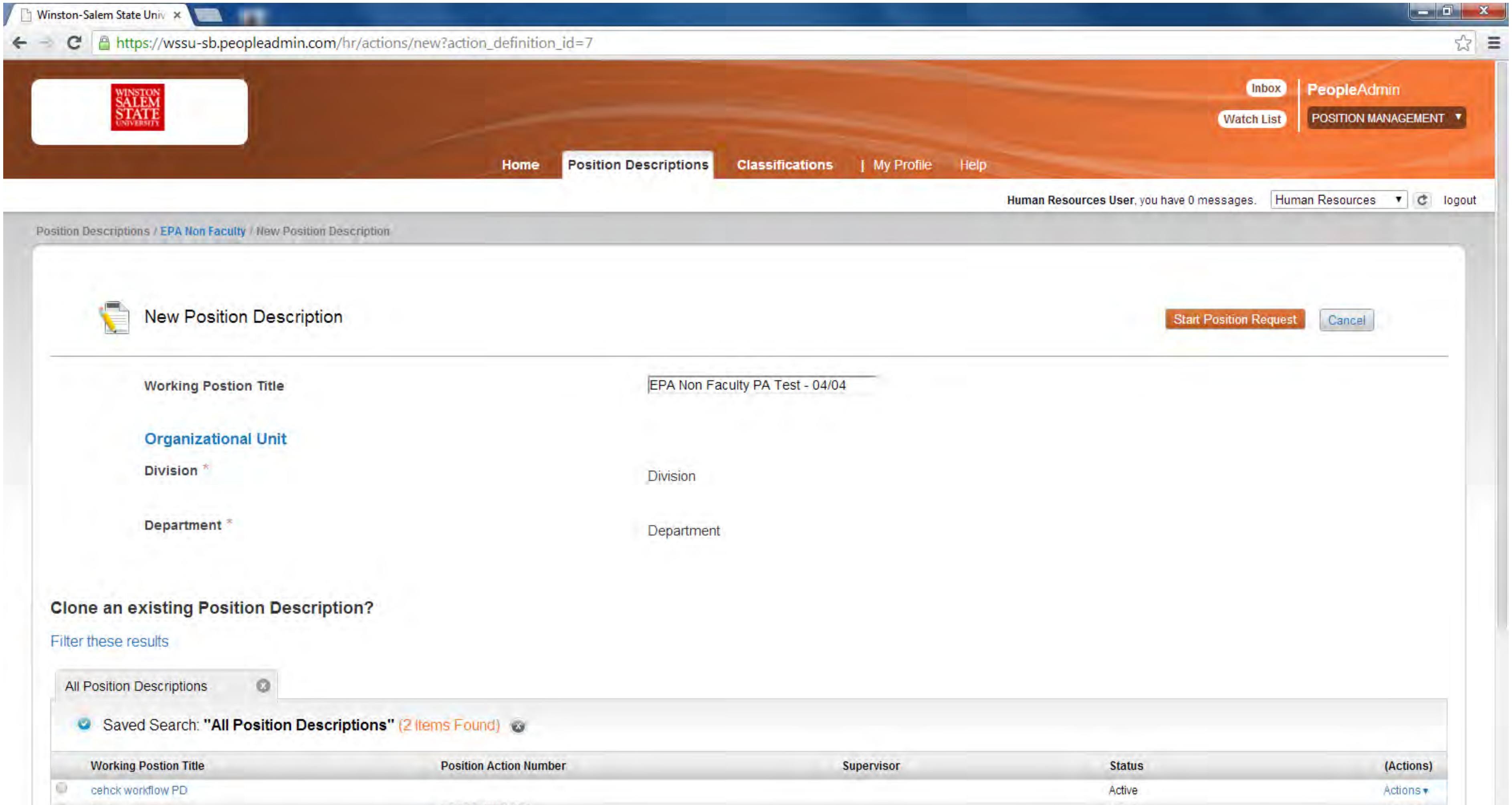

Fig 21: New Initiate EPA Non Faculty Position Description

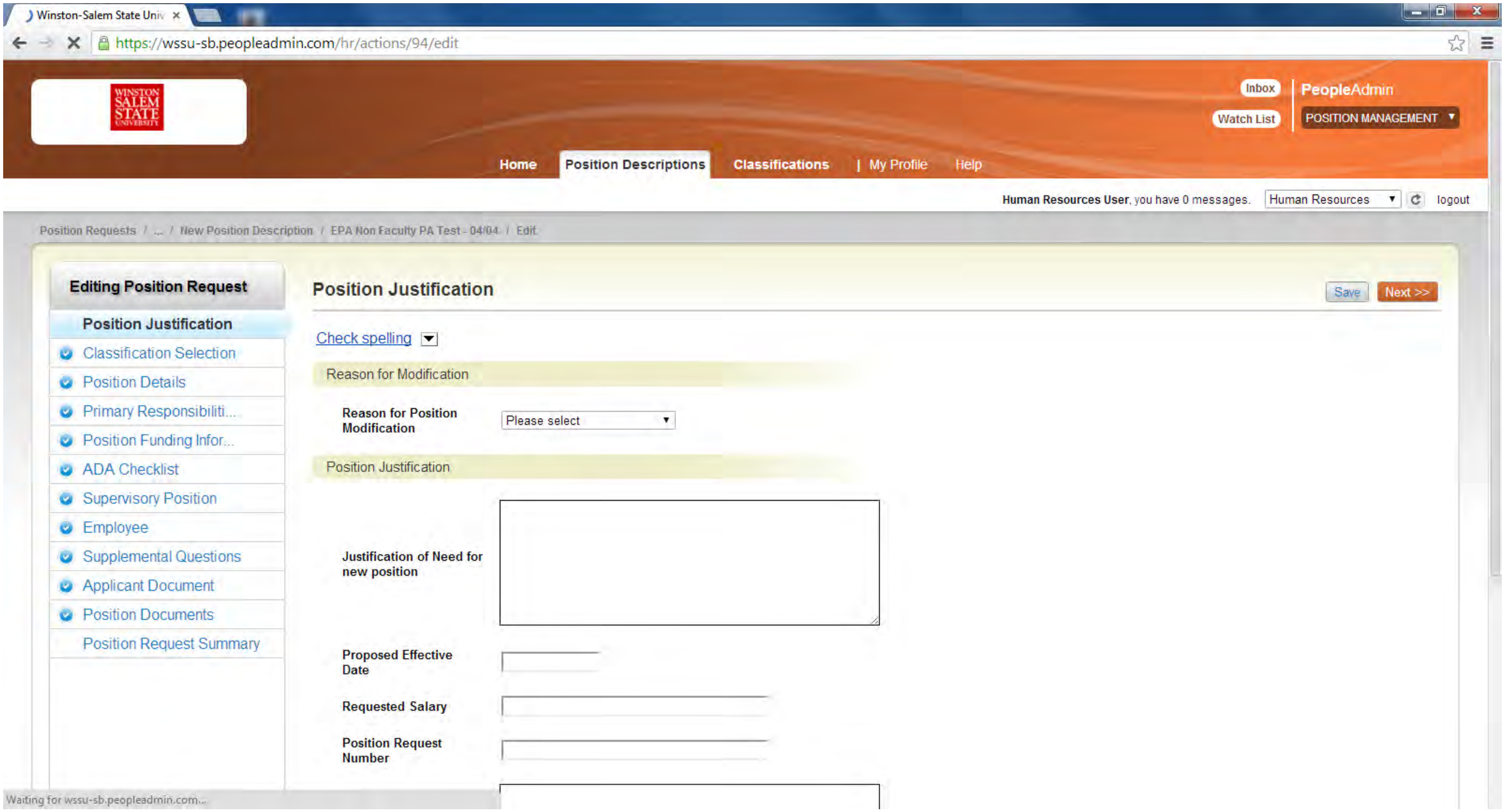

Fig 22: New EPA Non Faculty Position Description Details page

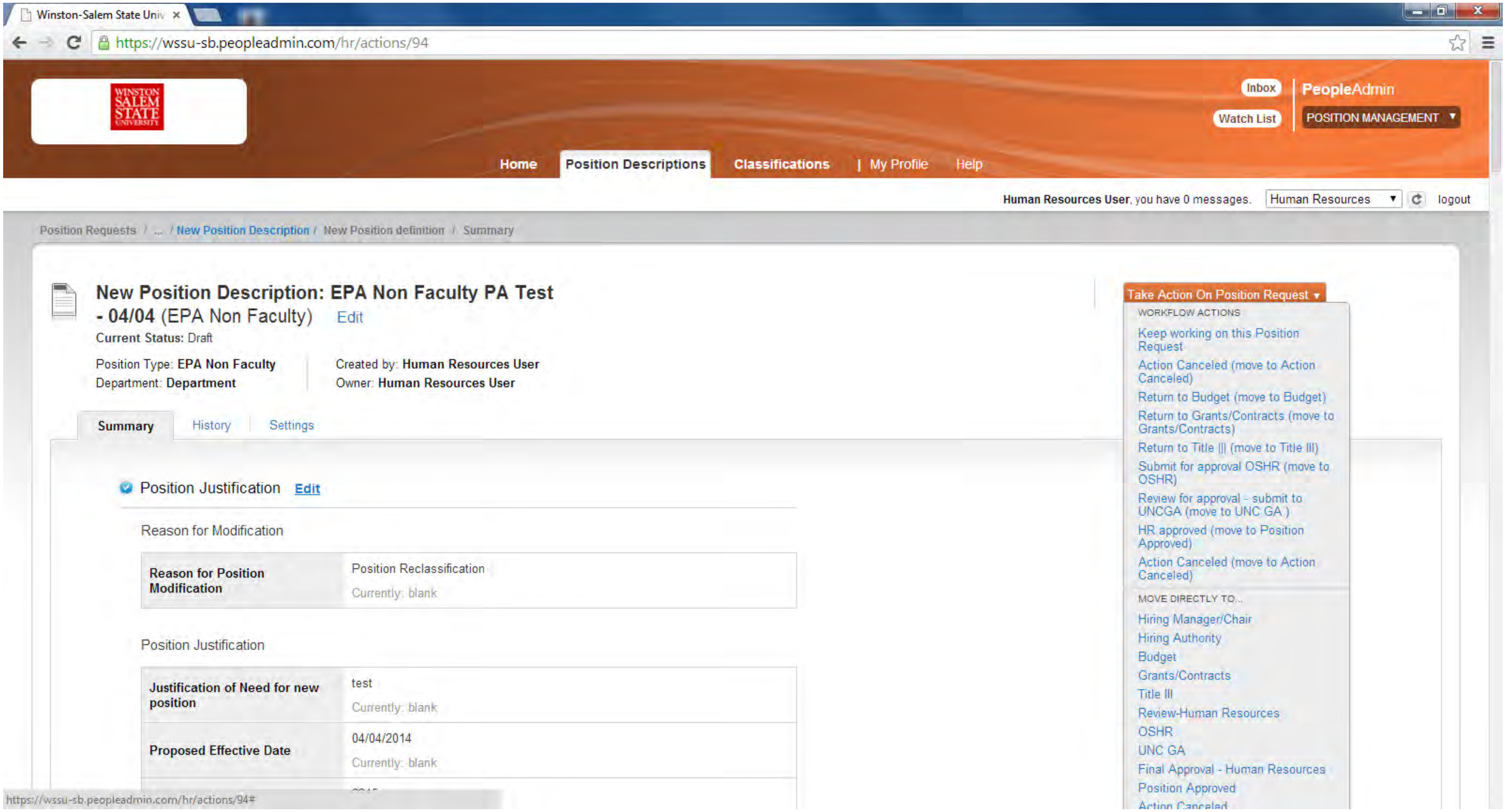

Fig 23: New EPA Non Faculty Position Description Summary page

[Workflow]

- To move the Position Description along in the workflow, hover over the orange *Take Action on Position Description* button and choose the action that you would like to take.

- ***When you transition the position description, you will have the opportunity to add a comment, which will appear in both the email that the state owner receives and in the history of the requisition. You can also flag it to appear on your watch list and this will display the requisition in the Watch List on your home screen.***

Modify Position

Locate and view the positions you just created and click on *Modify Position or TOPS Replacement.* Then click *Start* on the next page. Go through the modify action following the workflow until you reach Approved.

Modify SPA Position Description

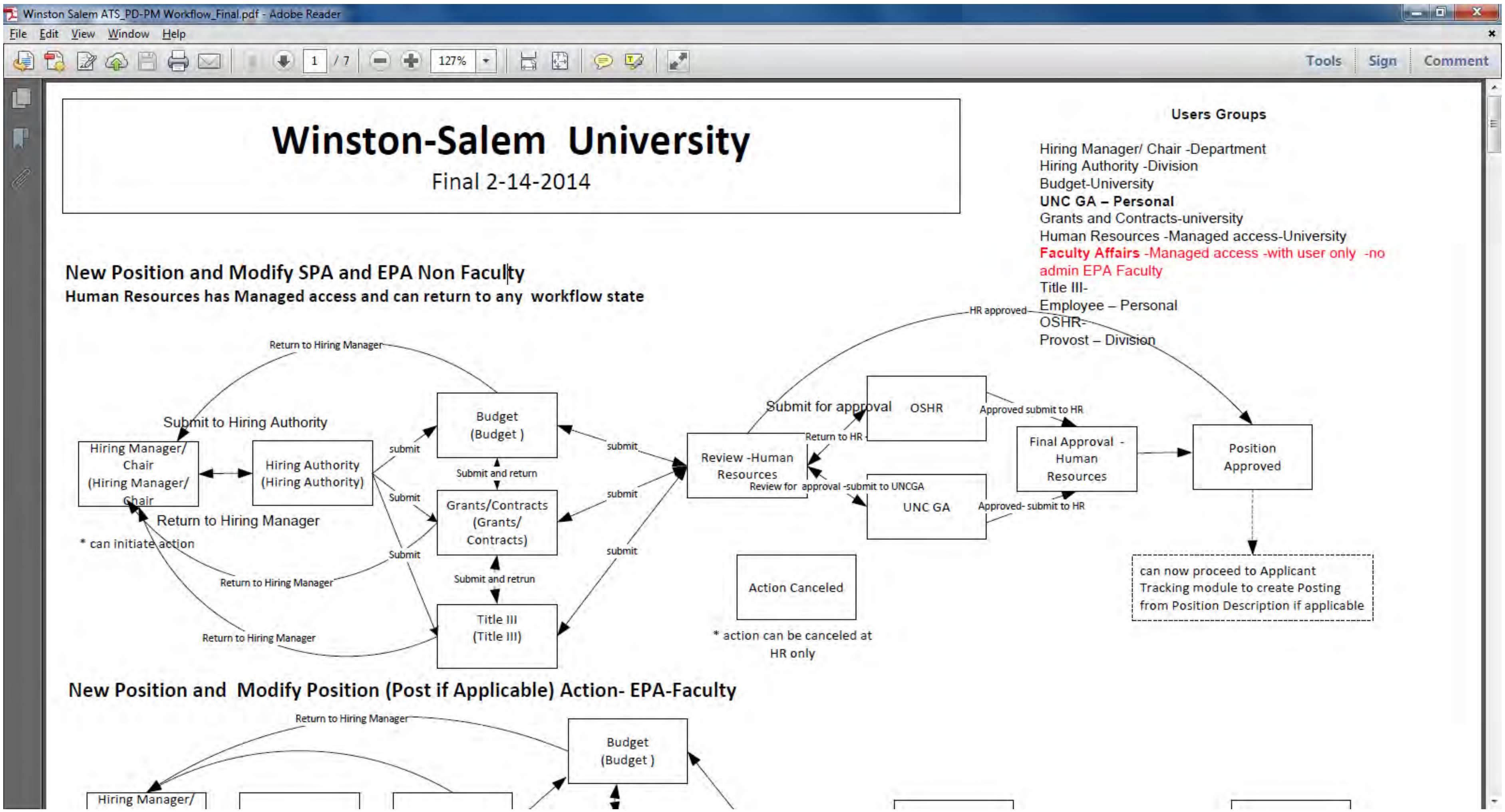

Fig 24: Modify SPA Position Description Workflow

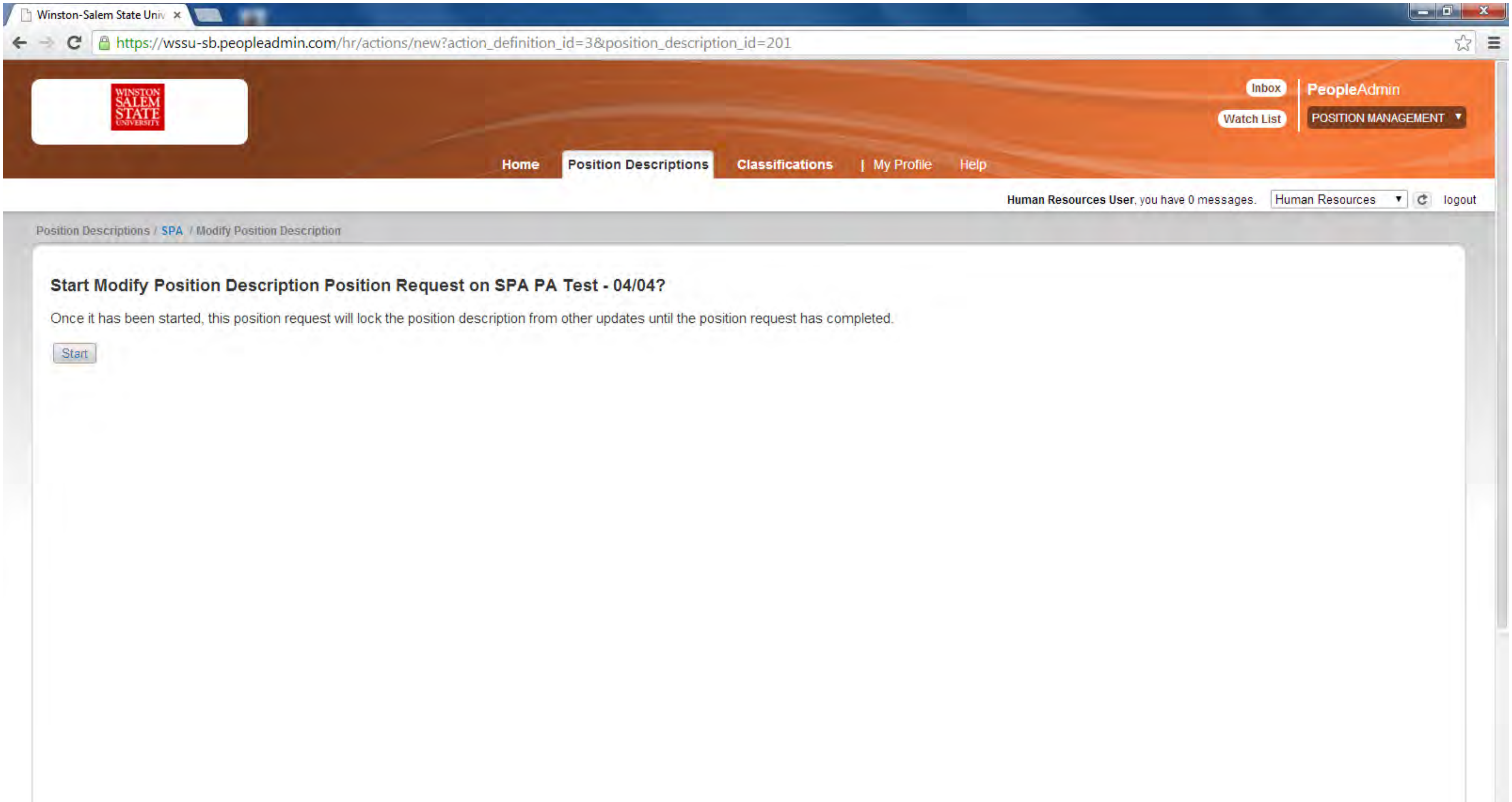

Fig 25: Initiate Modify SPA Position Description

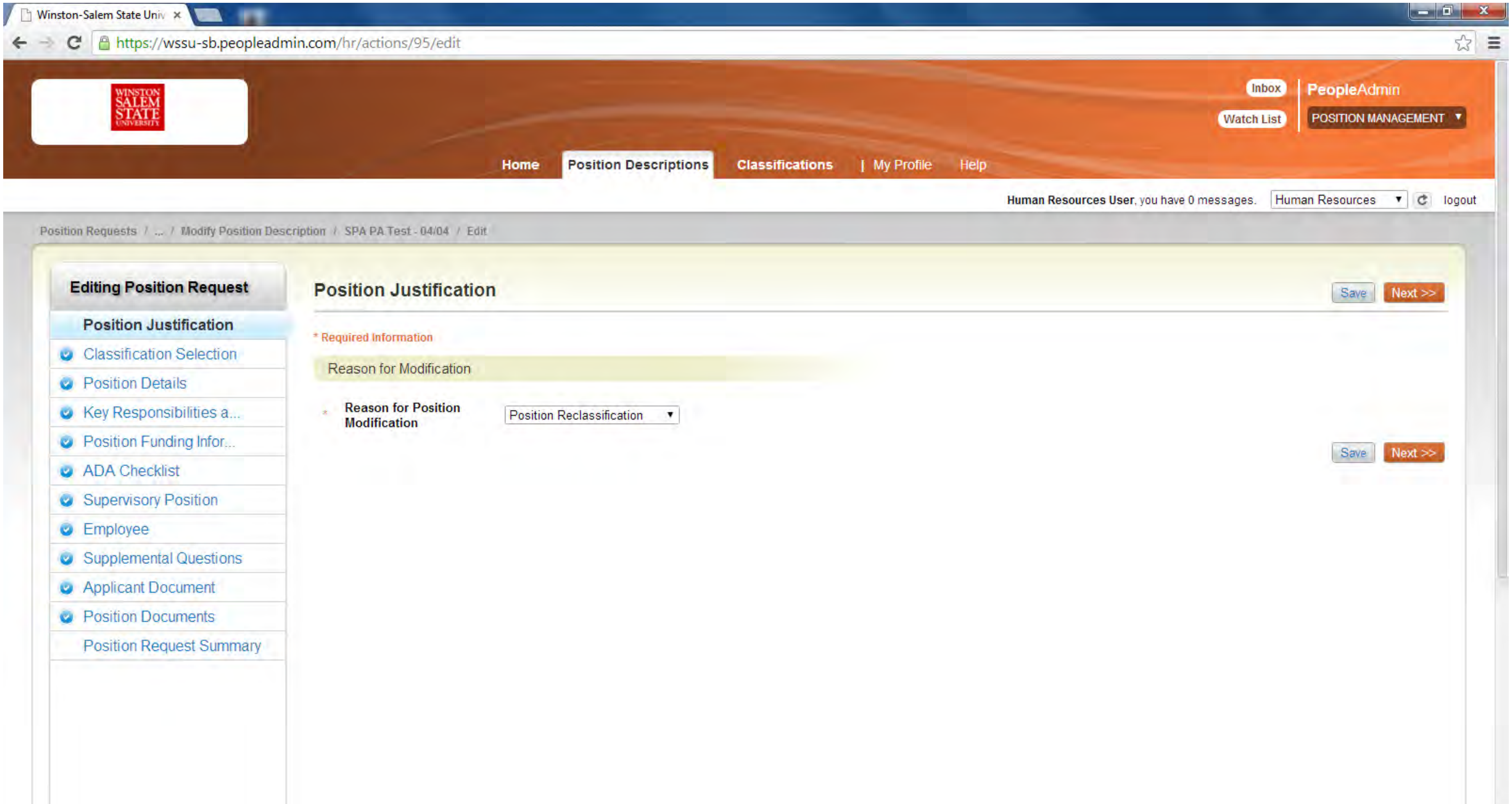

Fig 26: Modify SPA Position Description Details page

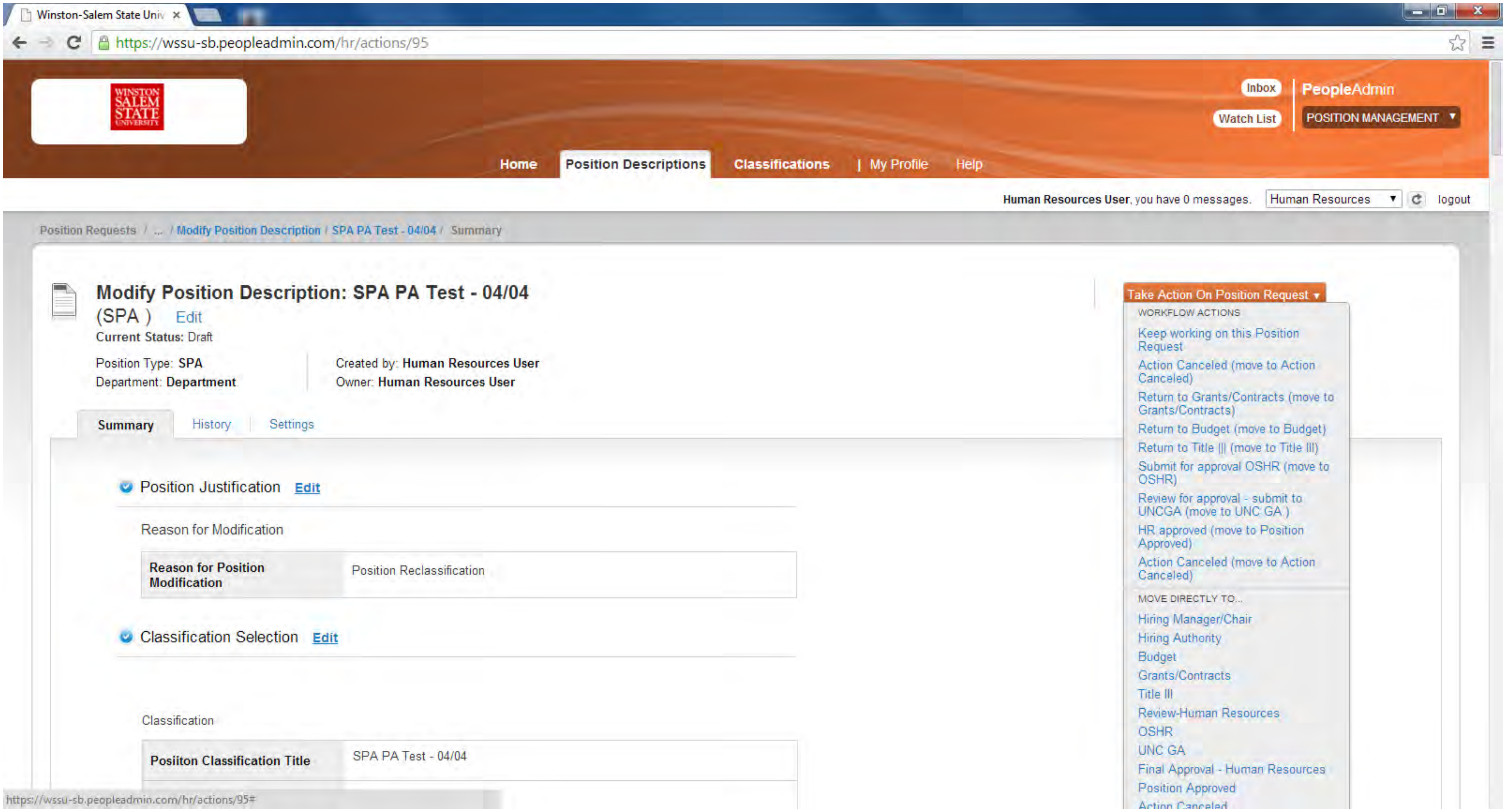

Fig 27: Modify SPA Position Description Summary page

[Workflow]

- To move the Position Description along in the workflow, hover over the orange *Take Action on Position Description* button and choose the action that you would like to take.

- ***When you transition the position description, you will have the opportunity to add a comment, which will appear in both the email that the state owner receives and in the history of the requisition. You can also flag it to appear on your watch list and this will display the requisition in the Watch List on your home screen.***

Modify EPA - Faculty Position Description

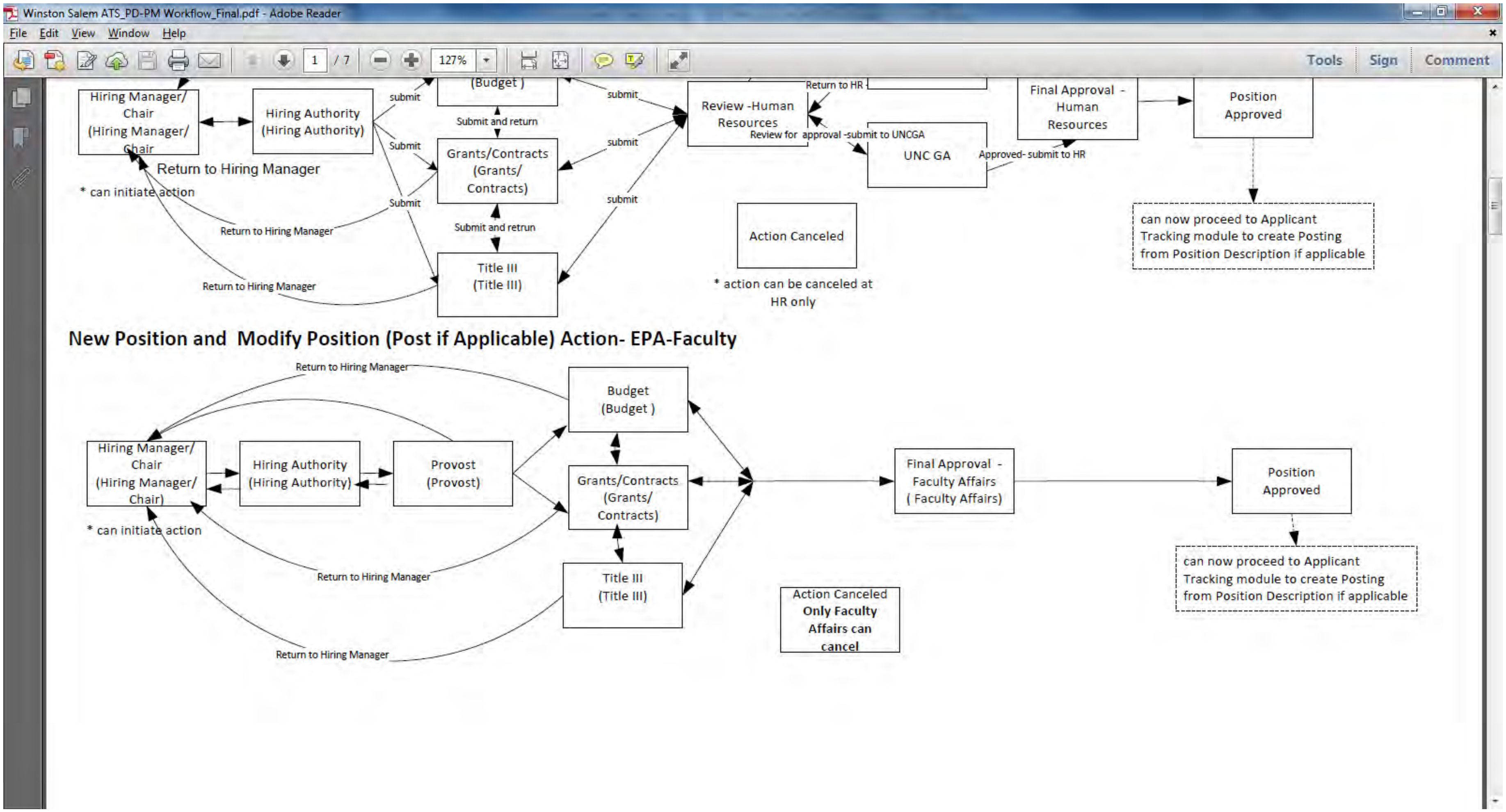

Fig 28: Modify EPA - Faculty Position Description Workflow

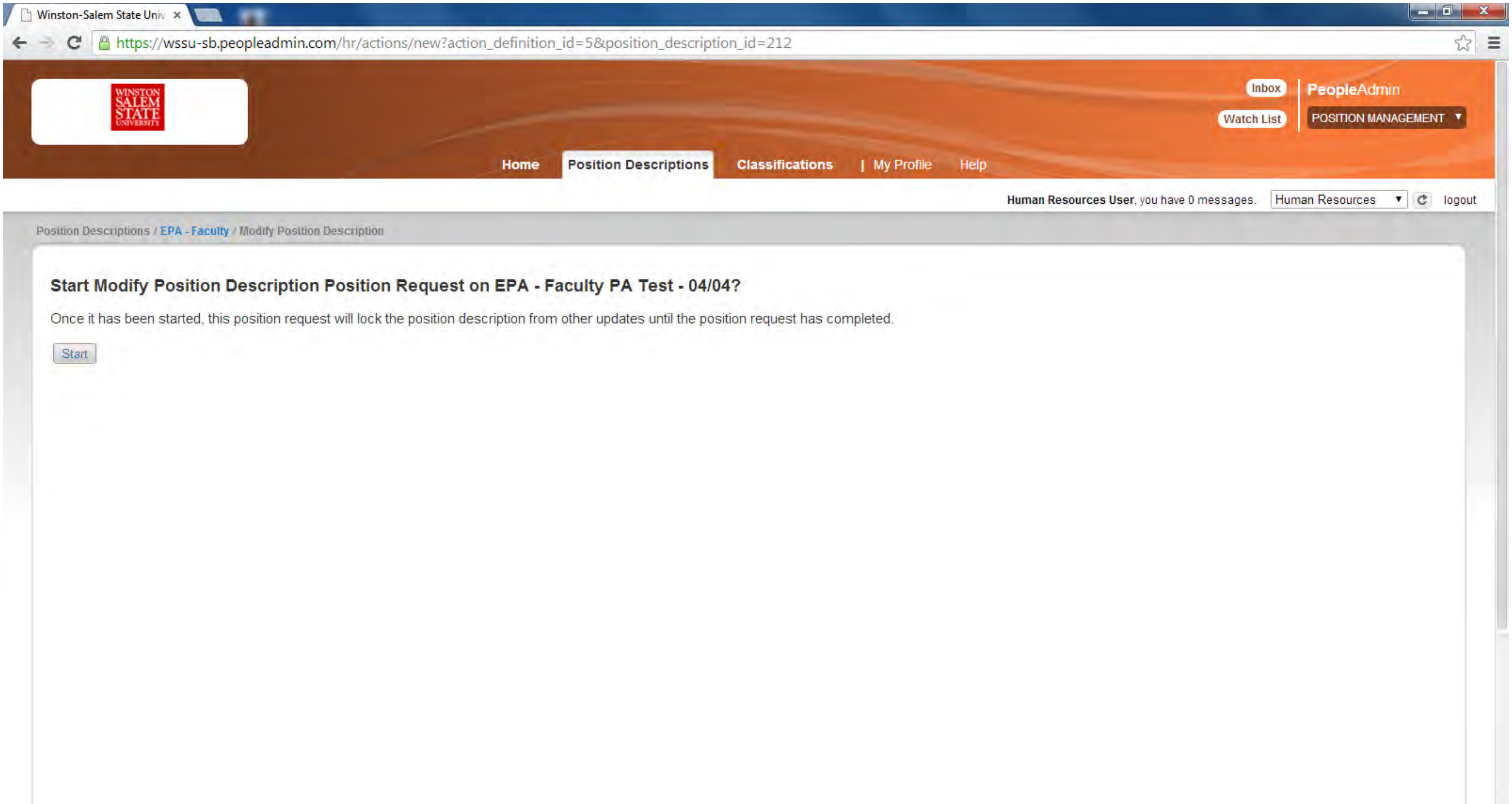

Fig 29: Initiate Modify EPA - Faculty Position Description

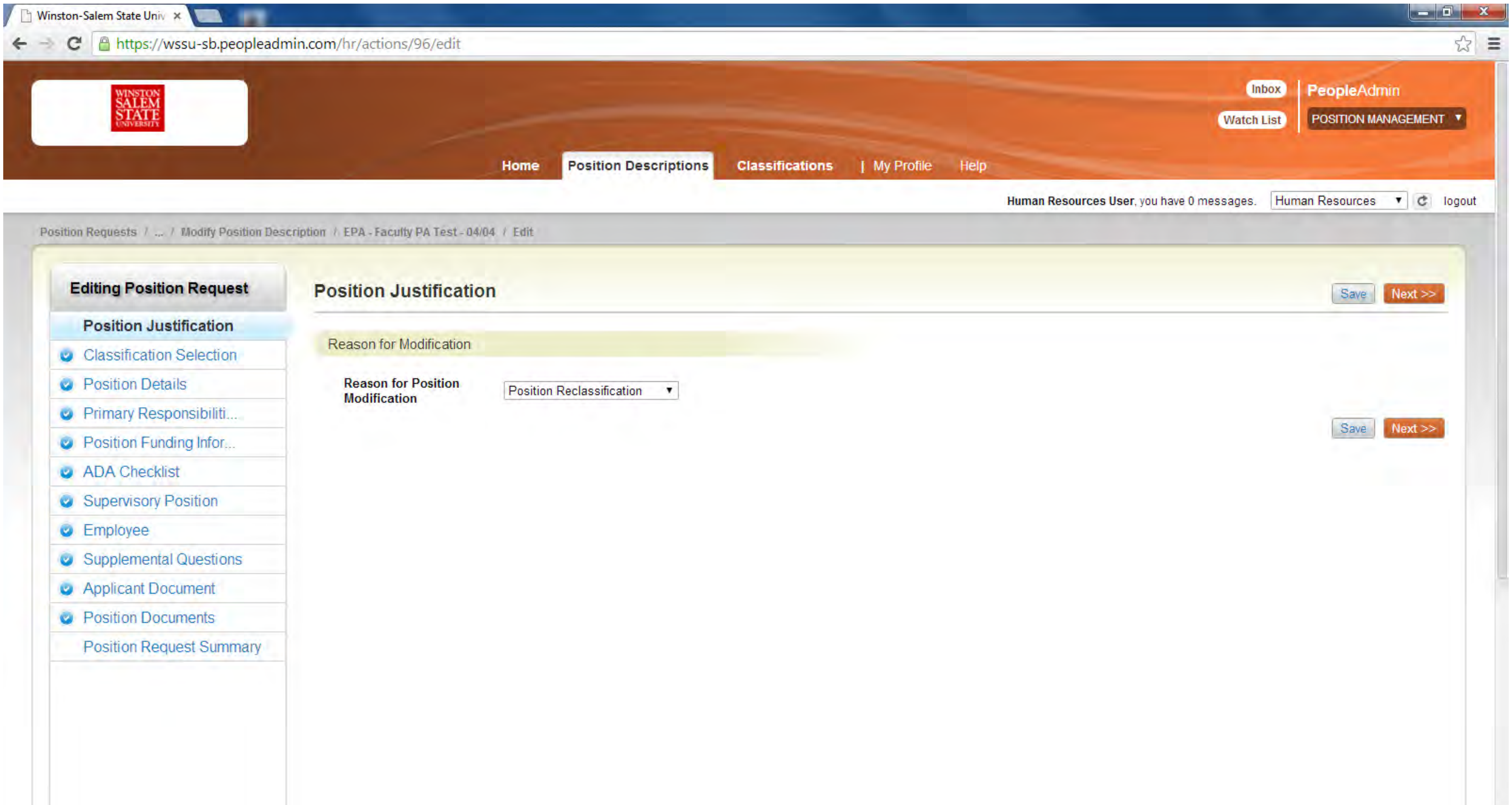

Fig 30: Modify EPA - Faculty Position Description Details page

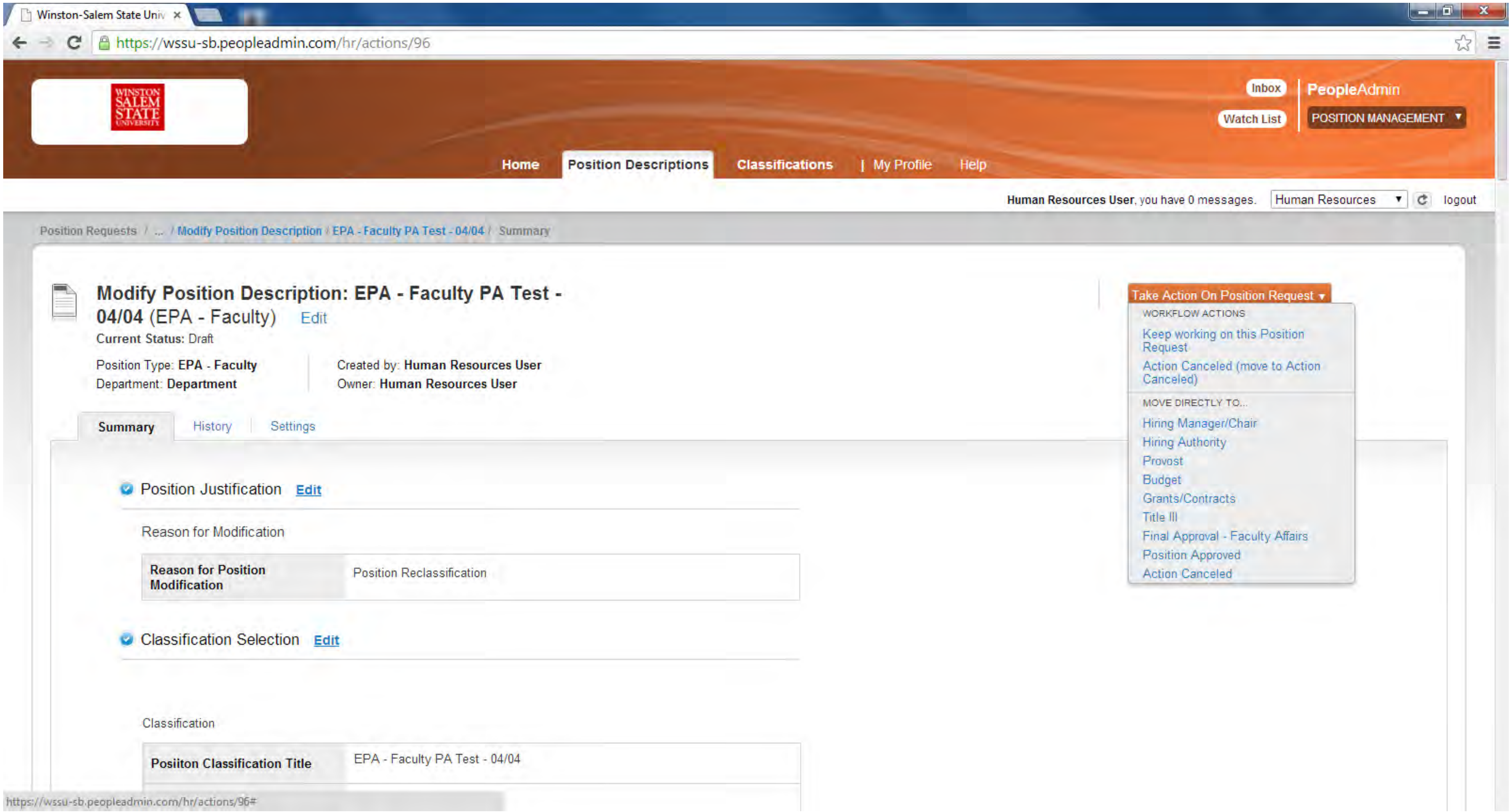

Fig 31: Modify EPA - Faculty Position Description Summary page

[Workflow]

- To move the Position Description along in the workflow, hover over the orange *Take Action on Position Description* button and choose the action that you would like to take.

- ***When you transition the position description, you will have the opportunity to add a comment, which will appear in both the email that the state owner receives and in the history of the requisition. You can also flag it to appear on your watch list and this will display the requisition in the Watch List on your home screen.***

Modify EPA Non Faculty Position Description

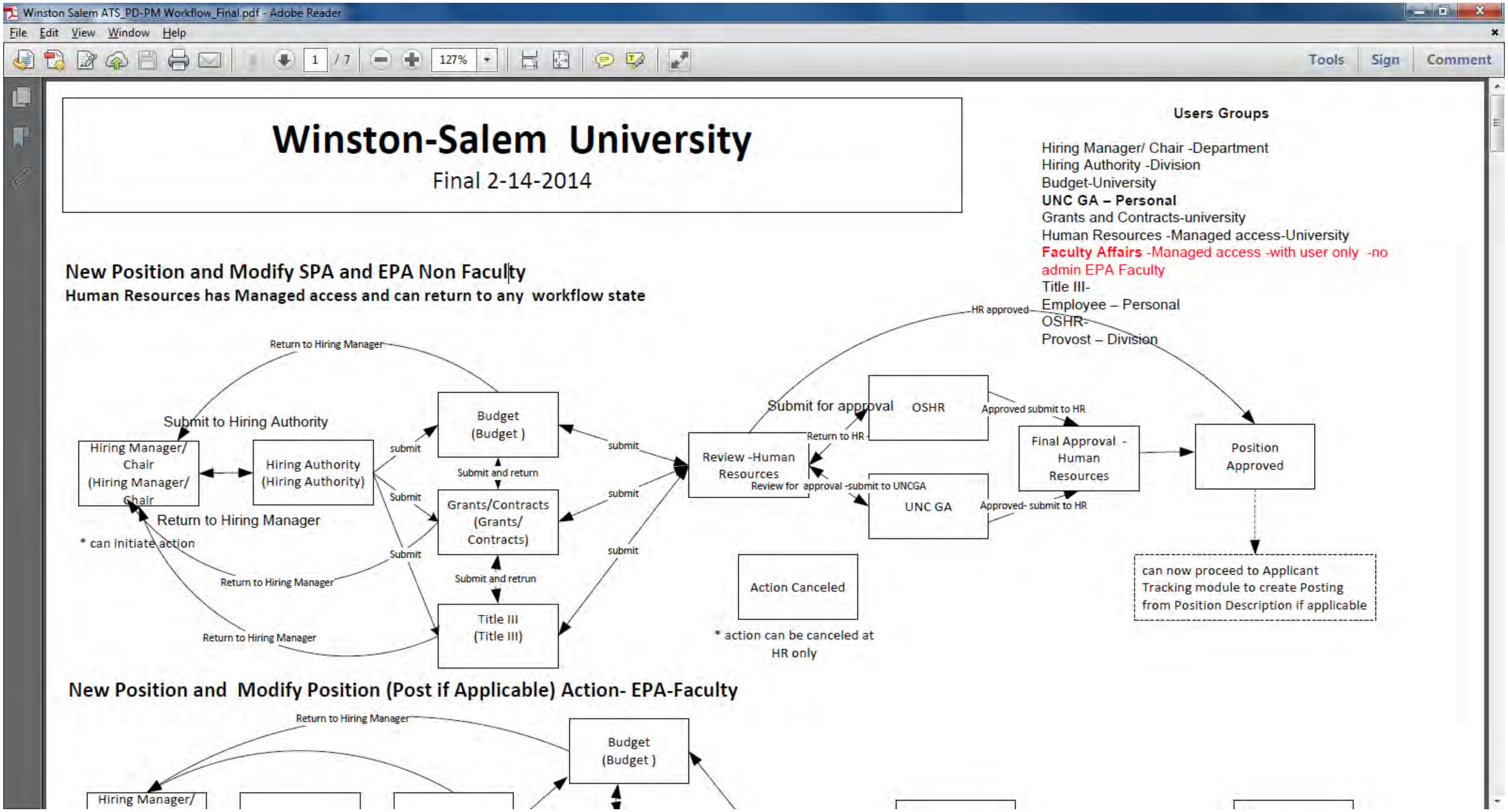

Fig 32: Modify EPA Non Faculty Position Description Workflow

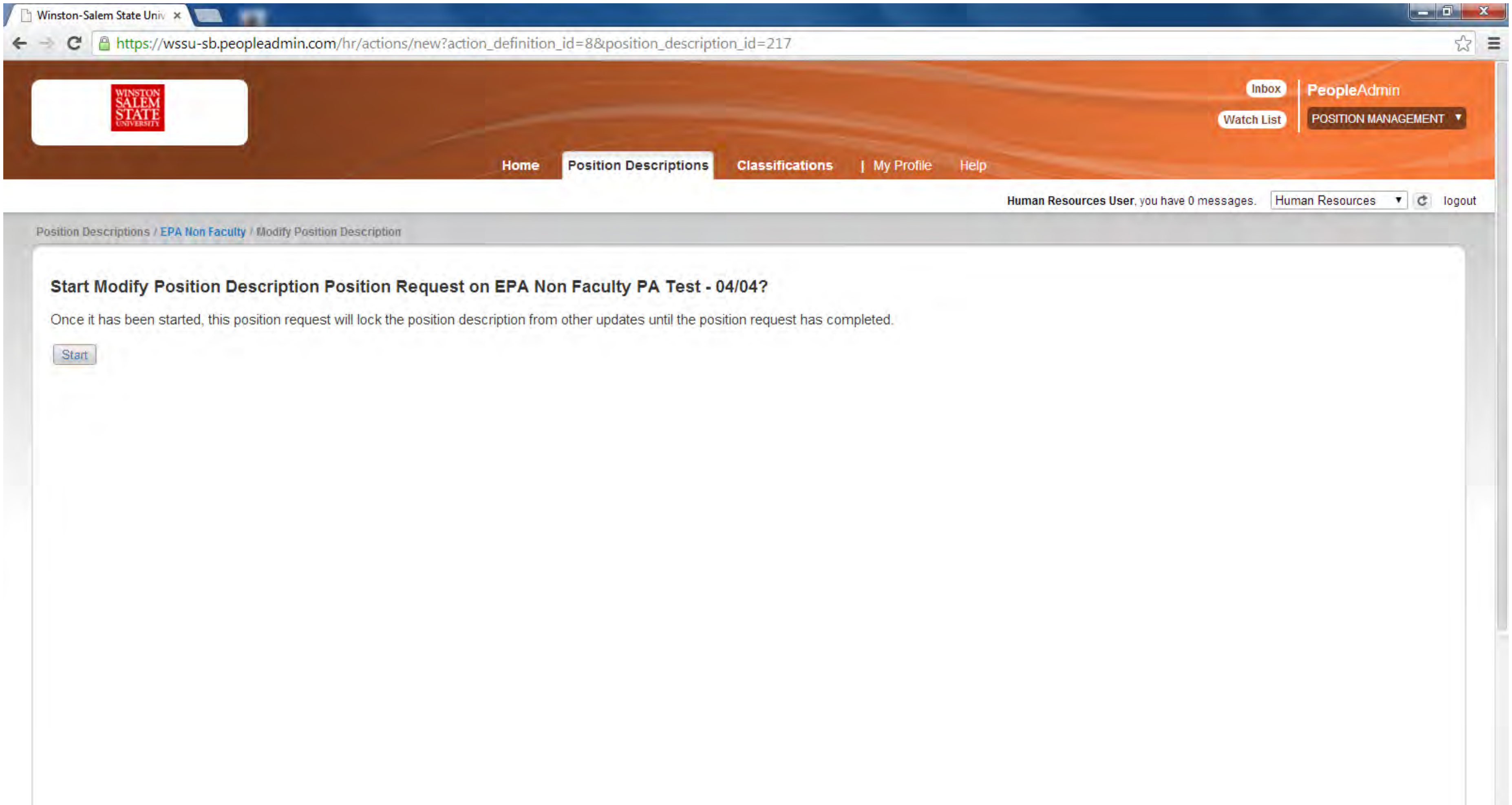

Fig 33: Initiate Modify EPA Non Faculty Position Description

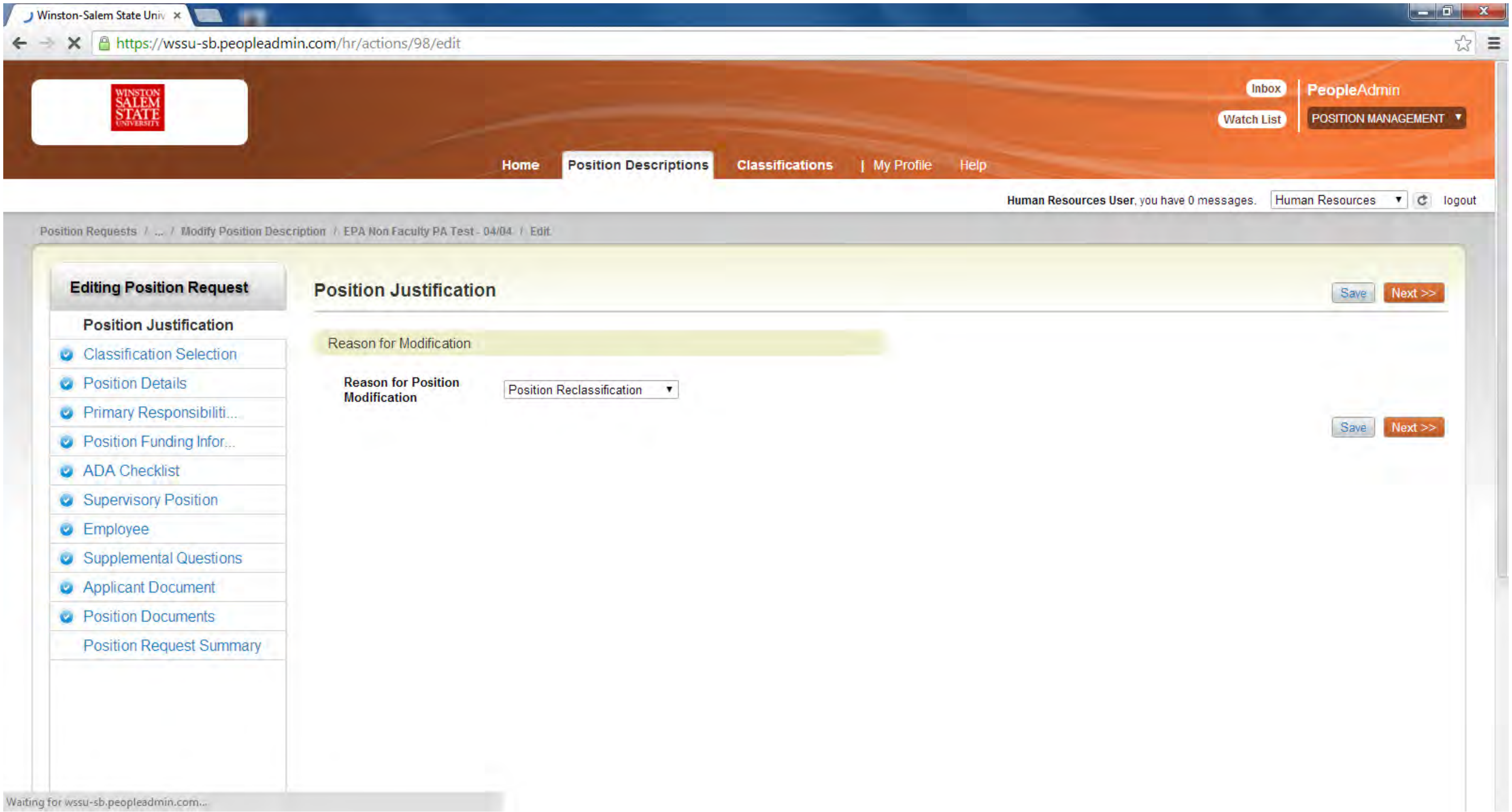

Fig 34: Modify EPA Non Faculty Position Description Details page

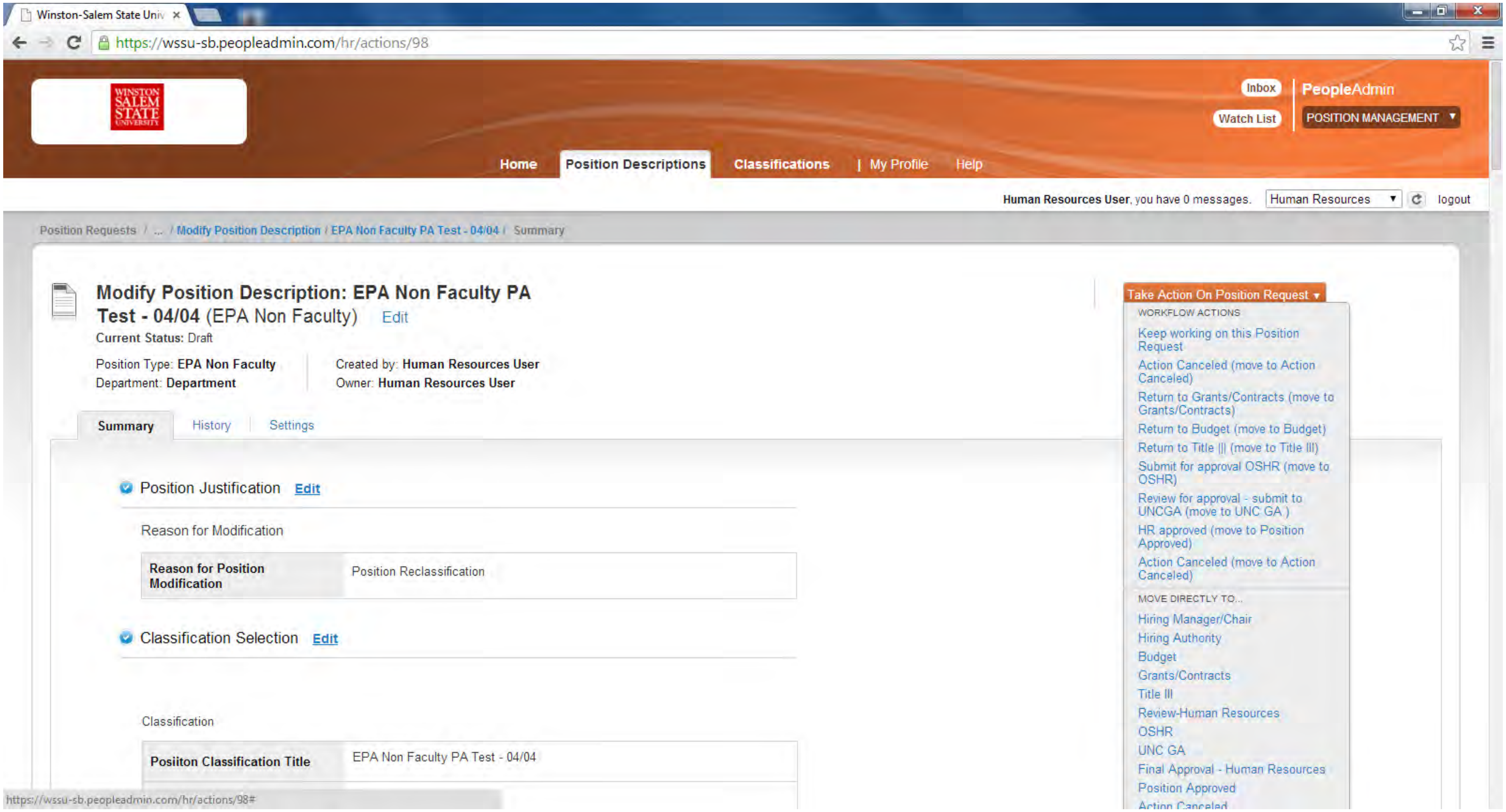

Fig 35: Modify EPA Non Faculty Position Description Summary page

[Workflow]

- To move the Position Description along in the workflow, hover over the orange *Take Action on Position Description* button and choose the action that you would like to take.

- **When you transition the position description, you will have the opportunity to add a comment, which will appear in both the email that the state owner receives and in the history of the requisition. You can also flag it to appear on your watch list and this will display the requisition in the Watch List on your home screen.**

Applicant Tracking

Hover over the module selection drop-down menu and select *Applicant Tracking.*

[Postings]

Hover over the *Postings* tab and click the appropriate position type option.
This takes you into the Postings list screen where you can create new postings or manage existing postings.

- **General Actions:** Hover over the grey *Actions* button where you have the following options:
  View Deleted Posting: View any postings that have been deleted
  Export Results: Export the current list view into an Excel document
  Bulk edit Postings: Edit multiple postings at once
  Bulk transition Postings: Transition multiple postings at once
- **View/Edit existing Postings:** Hover over the *Actions* link and click one of the following options:
  View Posting: View selected posting
  View Applicants: View list of applicants who have applied to the selected posting
  Watch: Add selected posting to your Watch List
- **Create a New Posting:** Click the orange *Create New Posting* button. You can also quickly create a new posting from the shortcut link on the home page. Choose how the posting will be added.
  Create from Position Type: Creates a posting from scratch
  Create from Classification: Creates a posting by auto-filling information from a classification.
  Create from Posting: Creates a posting by auto-filling information from an existing posting with which you can make any necessary changes.
  Create from Position Description: Creates a posting by auto-filling information from an existing position.
  [Note: If you choose to create from a Position Description or Posting, you will be directed to the list screen and you can either hover over the Actions link and choose Create From or view the listing and create posting from the summary screen]

[Process]

[Initial Page]

The initial settings page allows you to save a draft in the system so that you can locate and work on it at a later time.

- Enter a title.
- Choose the *appropriate organizational unit* where this posting will exist.
- If you want to use the reference letter function, select Accept References. You can choose to have emails sent once the applicant reaches a specific workflow state by updating the Reference Notification (not optional if you want an email to fire to the reference provider) and specify the required document for upload by the reference provider by selecting one under Recommendation Document Type (you have to select a document here, if you want the reference provider to have the ability to upload a document).
- Choose which application you will accept for this posting.
- Click orange *Create New Posting* button.

[Posting Details]

Fill out the fields, any field marked with a red asterisk is a required field, and click Next.

[Applicant documents]

Here you can choose which documents for the applicant to include. To have the document optional, click only Included, or require the document by clicking Required. If you want to require the document, you have to check both boxes.

[Supplemental Questions]

This will allow you to add additional questions that you would like the applicant to answer when applying for this position. To add a question, click the orange *Add a Question* button and a box will appear. You can either choose from questions that populate from previous postings by clicking the *Add* check box, or adding a new question by clicking the *Add a new one* link. To add a new question, provide a name and the Question.

> ***Open Ended Answers:*** *Will appear as a text box*
>
> ***Predefined Answers:*** *You can predefine answers for the applicant to choose from. More boxes will appear as you tab through*

Once you add the question to the posting, you can click on the blue question link and specify if you want an answer choice to be disqualifying or assign points for assessment.

[Reference Letters]

This section is where you can specify the reference requirements.

[Posting documents]

Here you can upload documents you wish to share internally.

[Guest user]

In this tab you can create a new guest user. This will create a generic user name and password that you can give guests to have view only access the posting. You can enter in email addresses and email will be sent to those users.

[Search Committee] –

You can assign members to the search committee on this page. You can search for existing search committee members using the search at the top or create a new search committee member in this section. If you create a new user, HR will have to approve the member.

[Evaluative Criteria] -

This section is where you can add evaluative questions to the posting. These can be used as an evaluative criteria during the candidate process, to rank applicants. When adding an evaluative criteria, when you check the *Add* box, you will have the opportunity to choose an Applicant Workflow State, this is important because this will be the state at which the questions will be available to be answered by the responsible user.

[Summary page]

On the summary page you can review the posting, see how the posting looks to applicants and see a print preview of both the internal and applicant view of the posting.

Create New SPA Posting

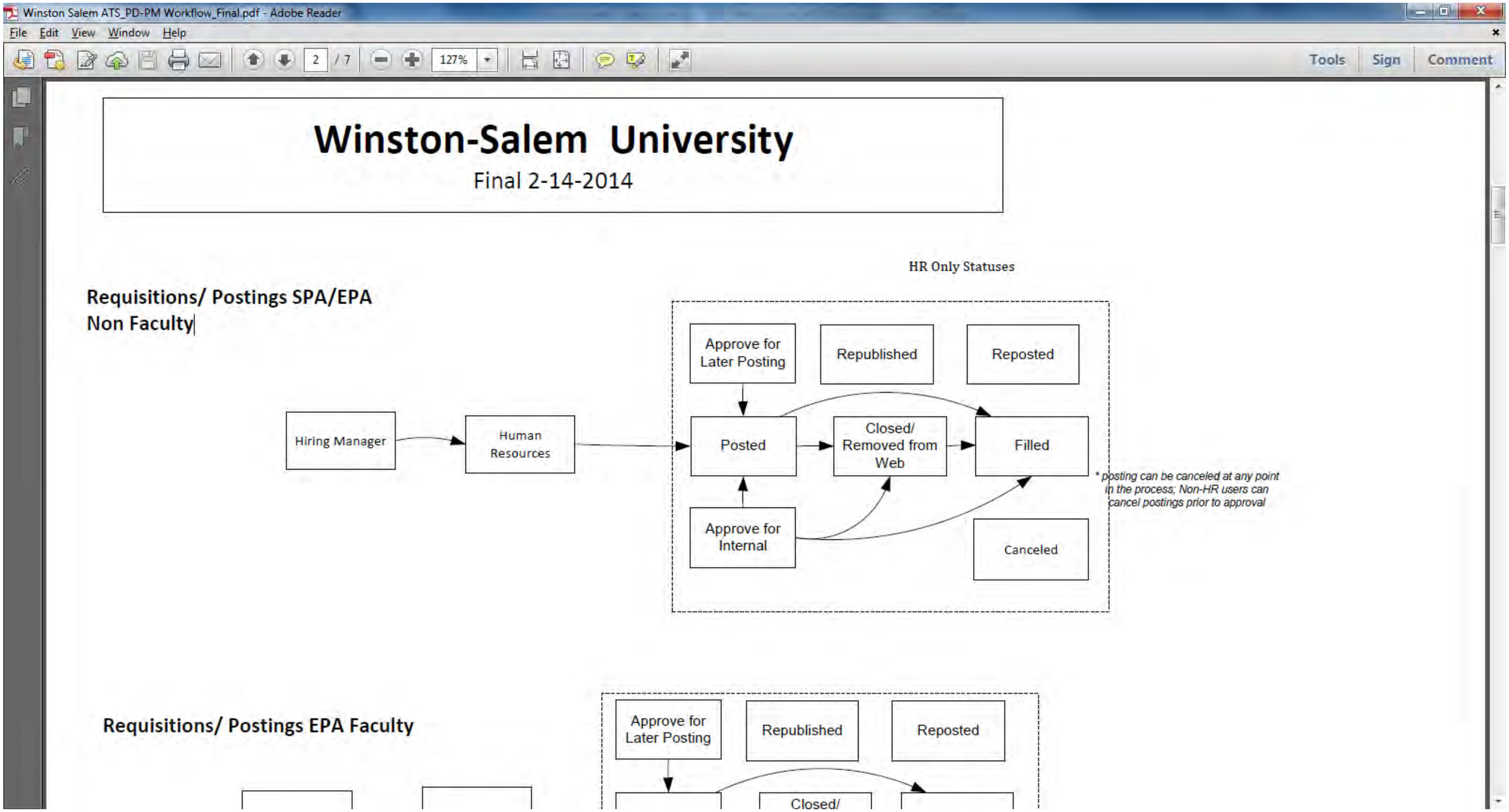

Fig 36: SPA Posting Workflow

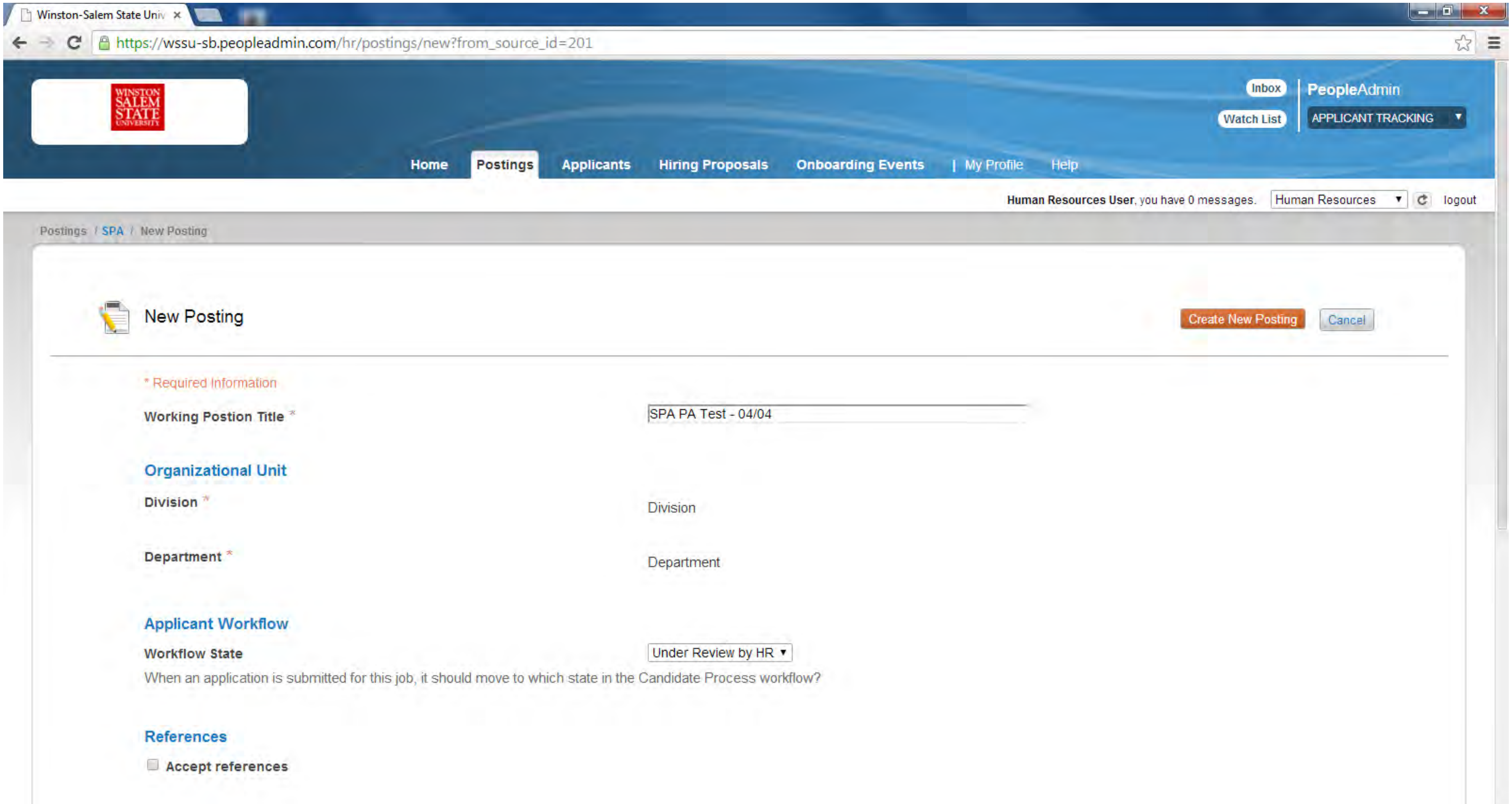

Fig 37: Create New SPA Posting

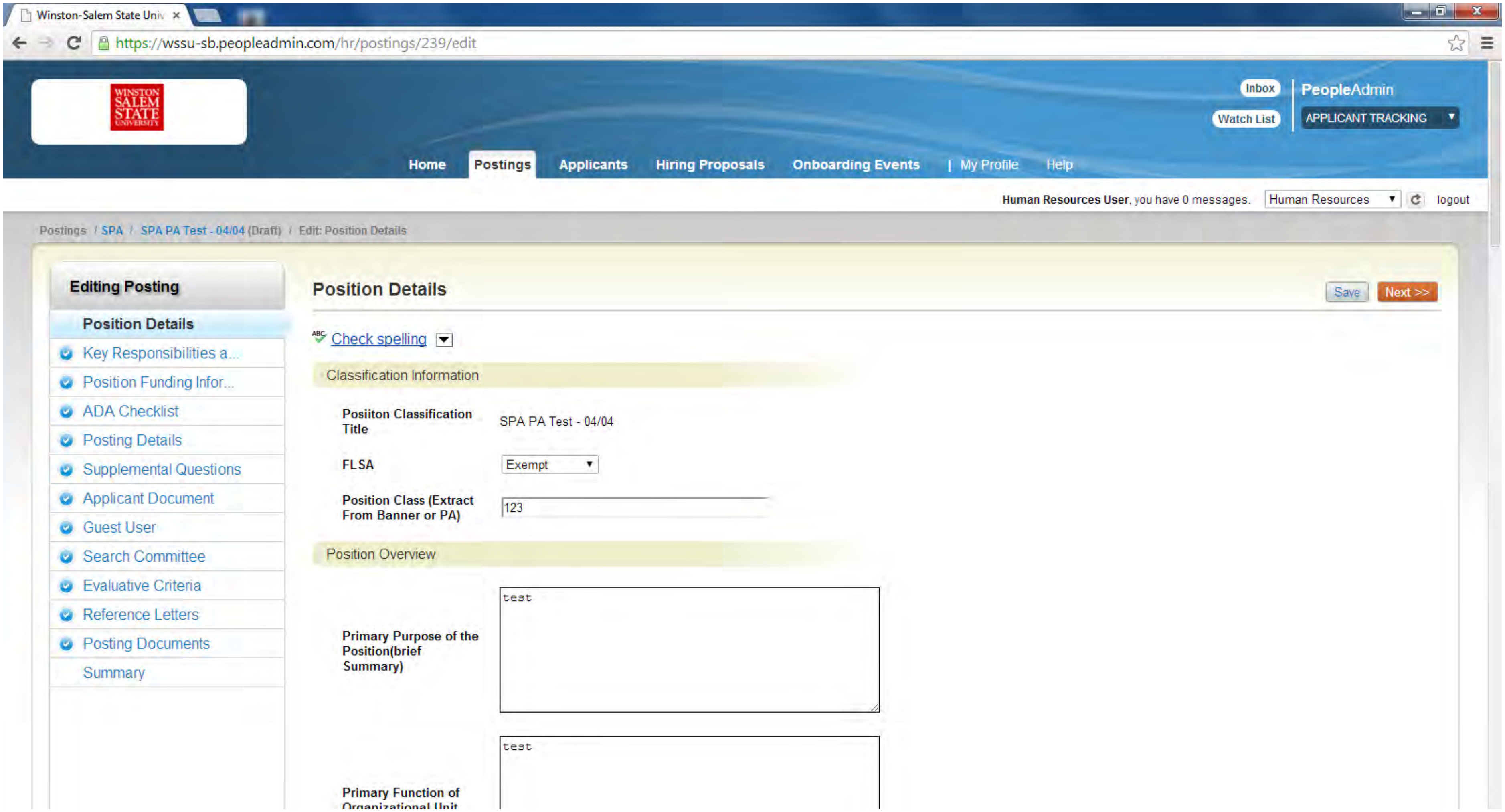

Fig 38: SPA Posting tab ordering Details page

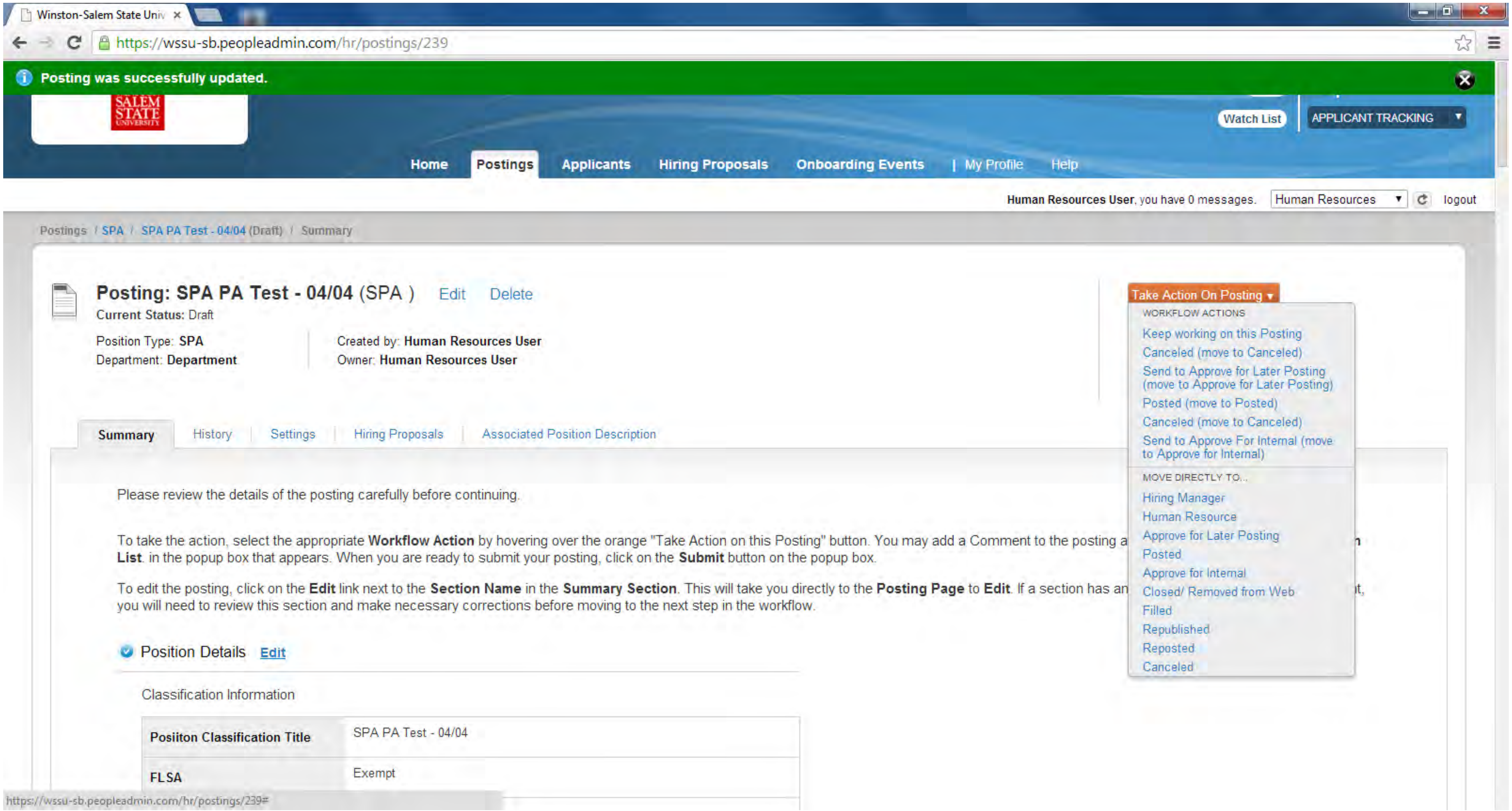

Fig 39: SPA Posting Created and Posted

[Workflow]

To move the posting along in the workflow, hover over the orange *Take Action on Posting* button and choose the action that you would like to take.

When you transition the requisition, you will have the opportunity to add a comment, which will appear in both the email that the state owner receives and in the history of the requisition. You can also flag it to appear on your watch list and this will display the requisition in the Watch List on your home screen.

Create New EPA - Faculty Posting

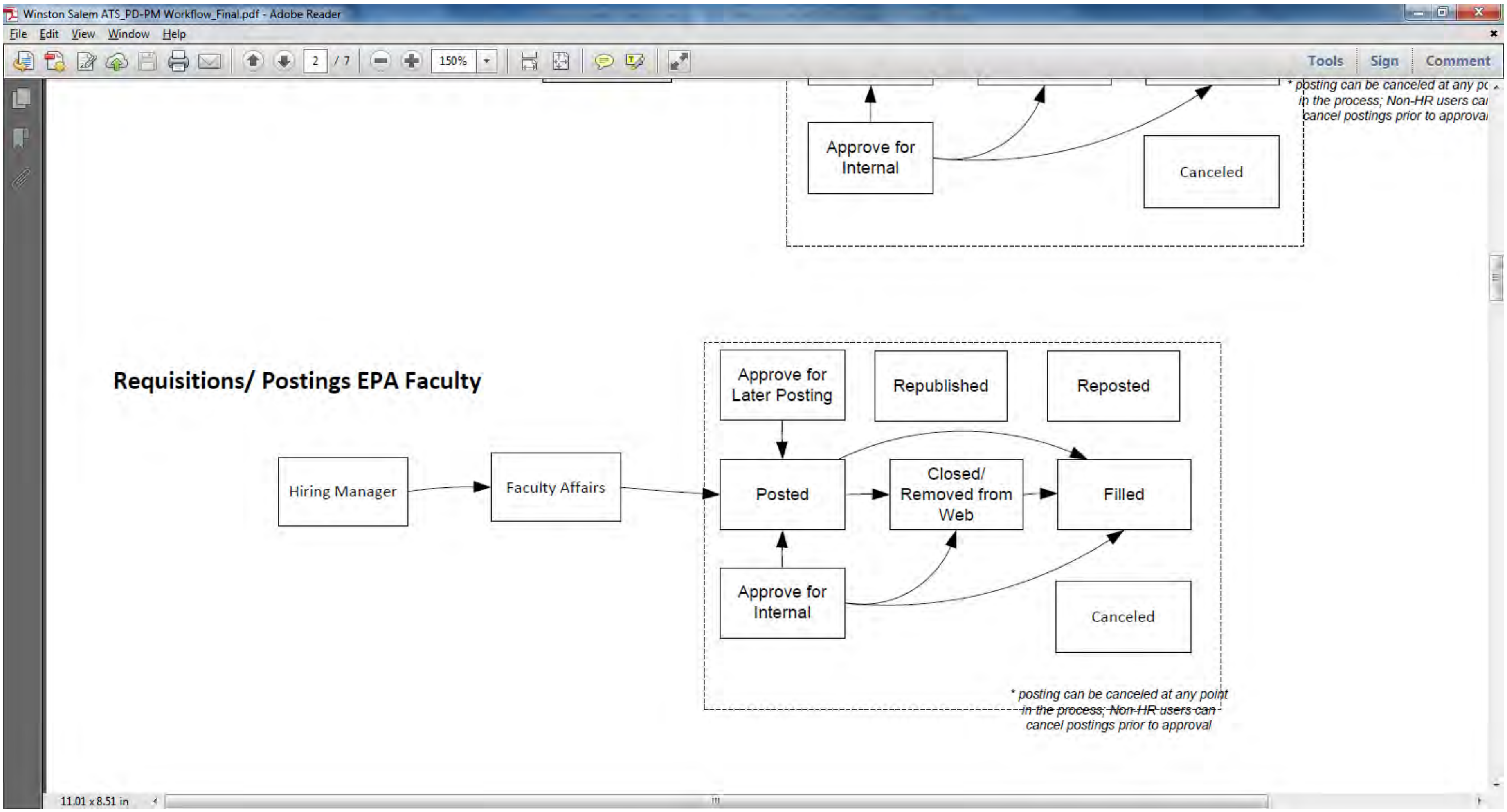

Fig 40: EPA - Faculty Posting Workflow

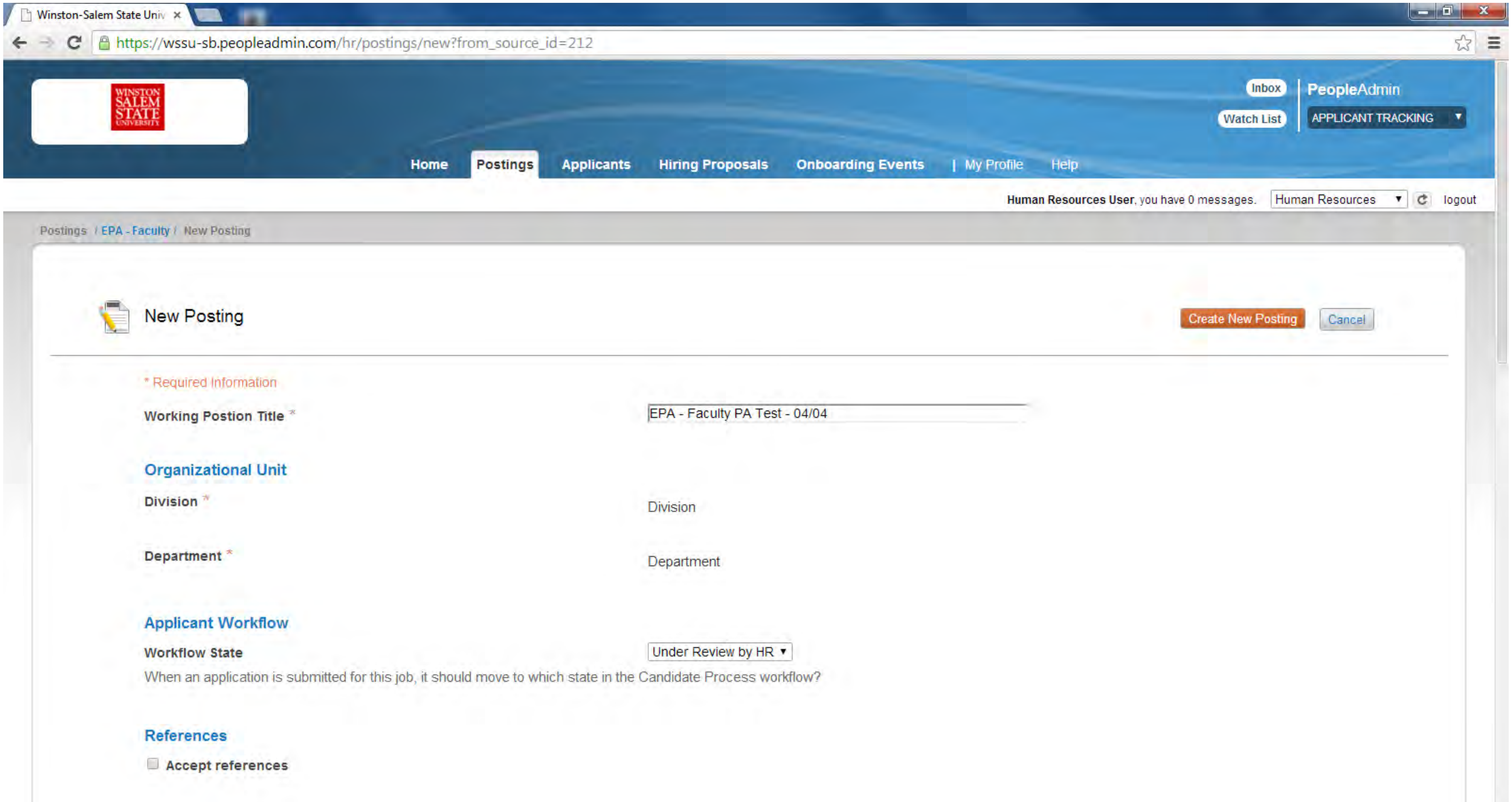

Fig 41: Create New EPA - Faculty Posting

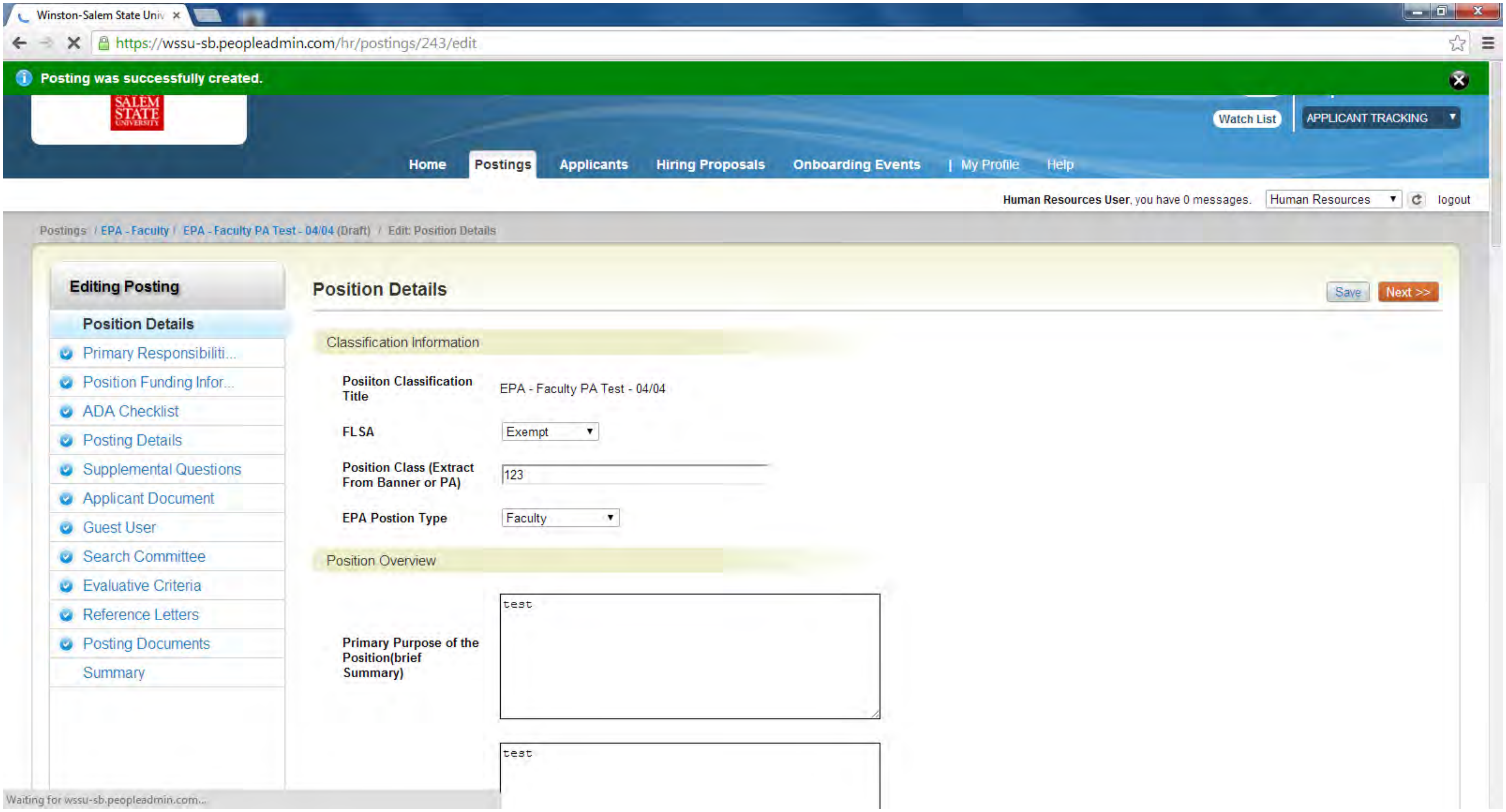

Fig 42: EPA - Faculty Posting tab ordering Details page

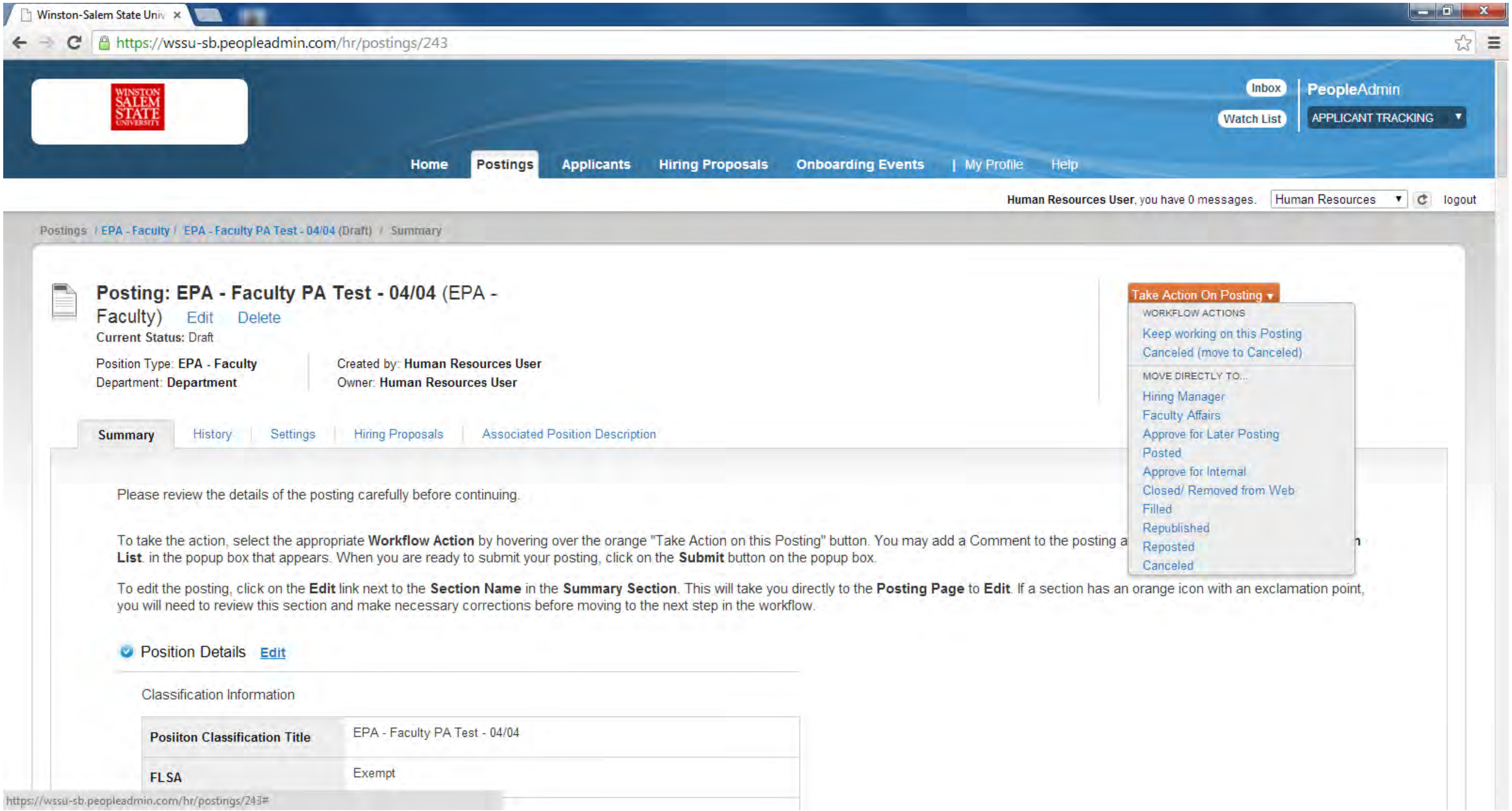

Fig 43: EPA - Faculty Posting Created and Posted

[Workflow]

To move the posting along in the workflow, hover over the orange *Take Action on Posting* button and choose the action that you would like to take.

When you transition the requisition, you will have the opportunity to add a comment, which will appear in both the email that the state owner receives and in the history of the requisition. You can also flag it to appear on your watch list and this will display the requisition in the Watch List on your home screen.

Create New EPA Non Faculty Posting

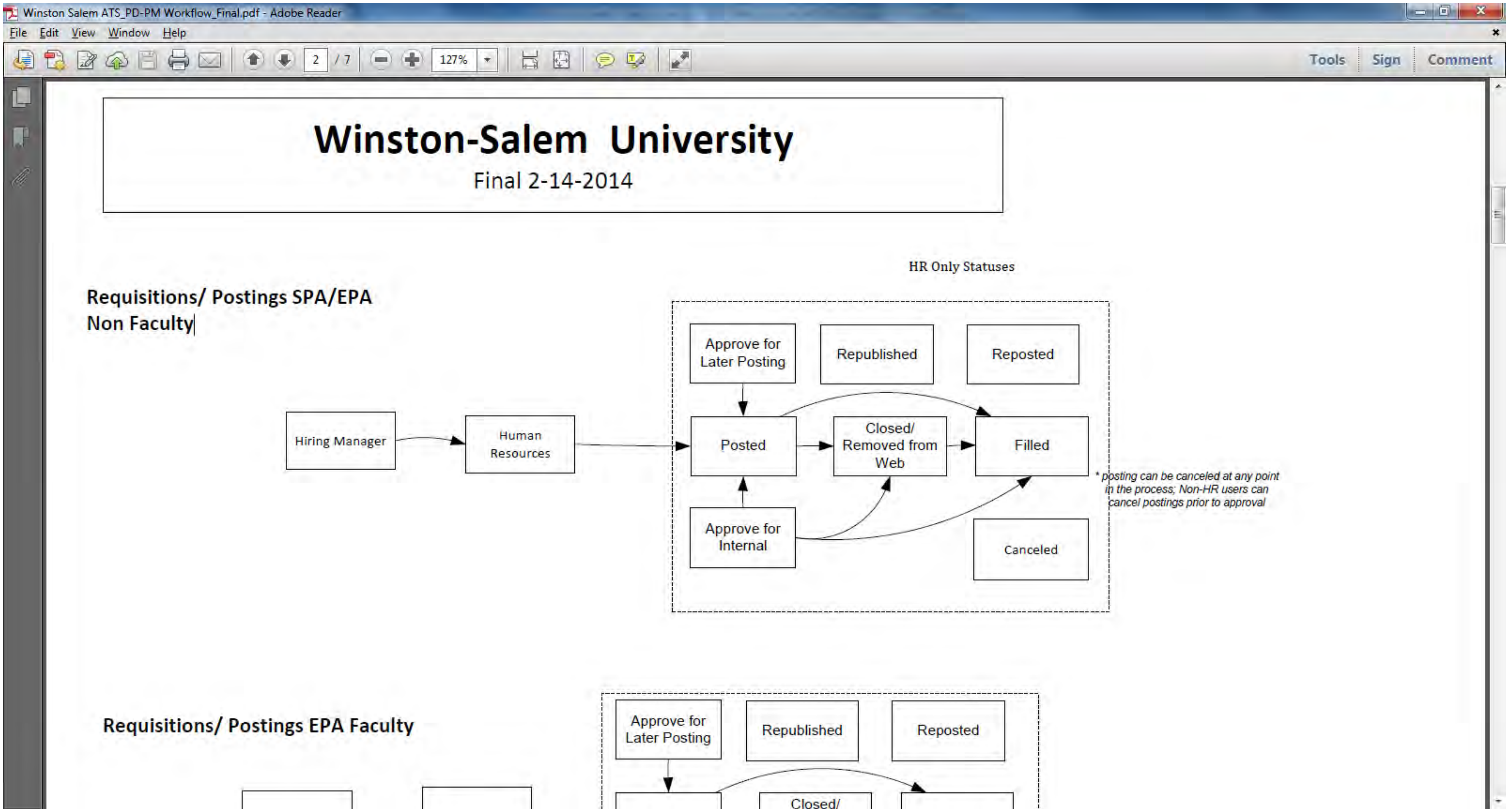

Fig 44: EPA Non Faculty Posting Workflow

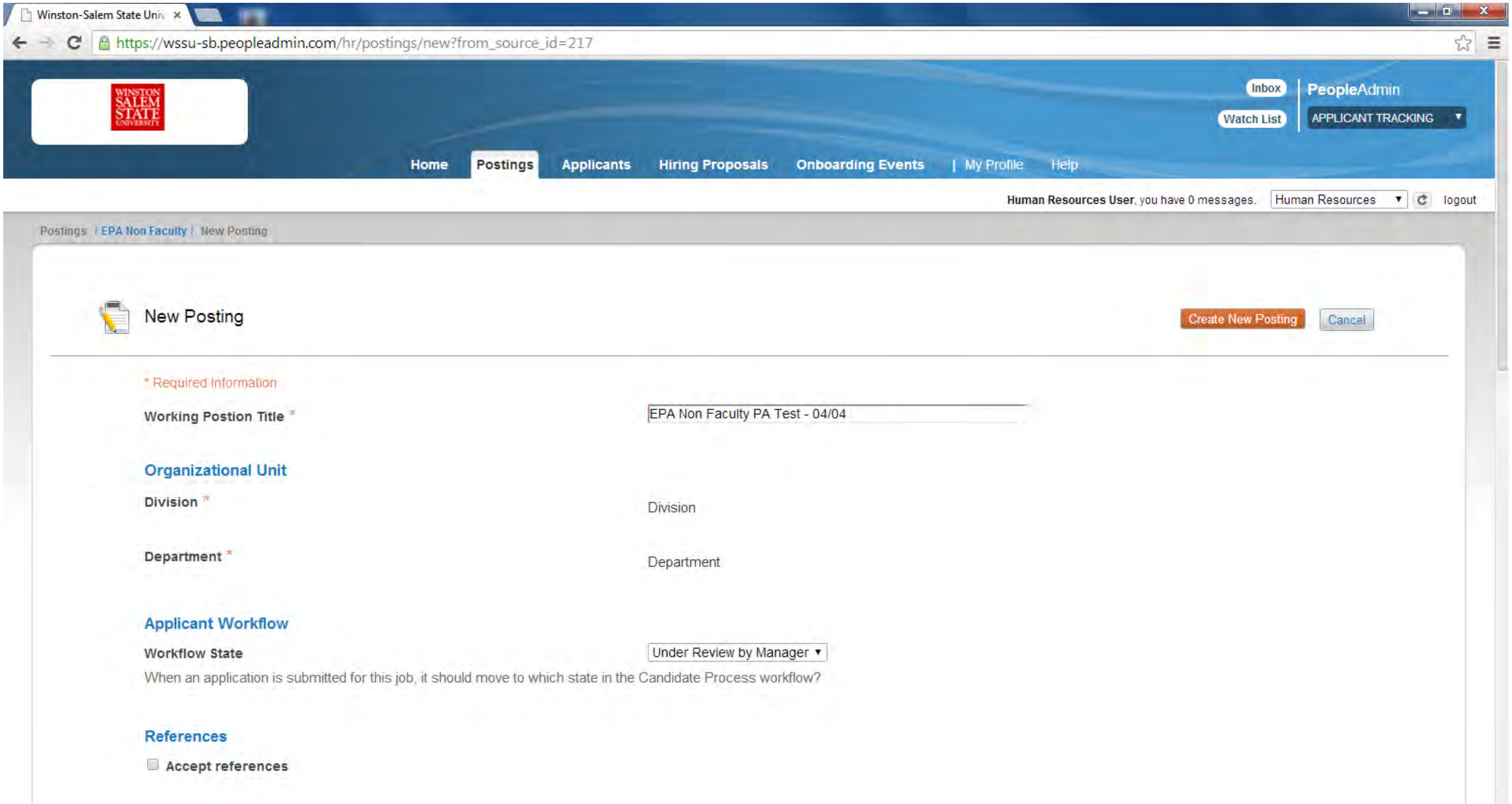

Fig 45: Create New EPA Non Faculty Posting

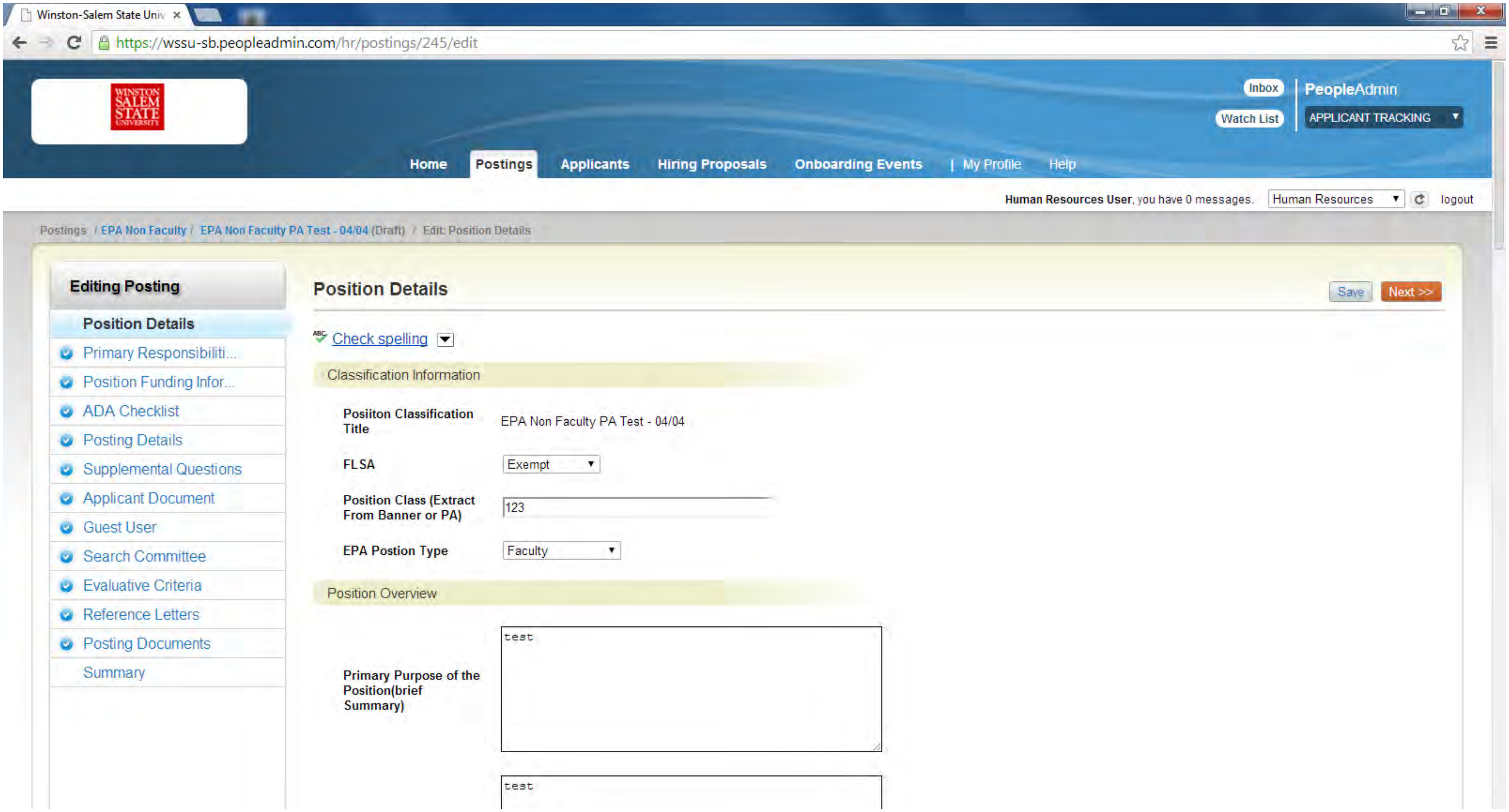

Fig 46: EPA Non Faculty Posting tab ordering Details page

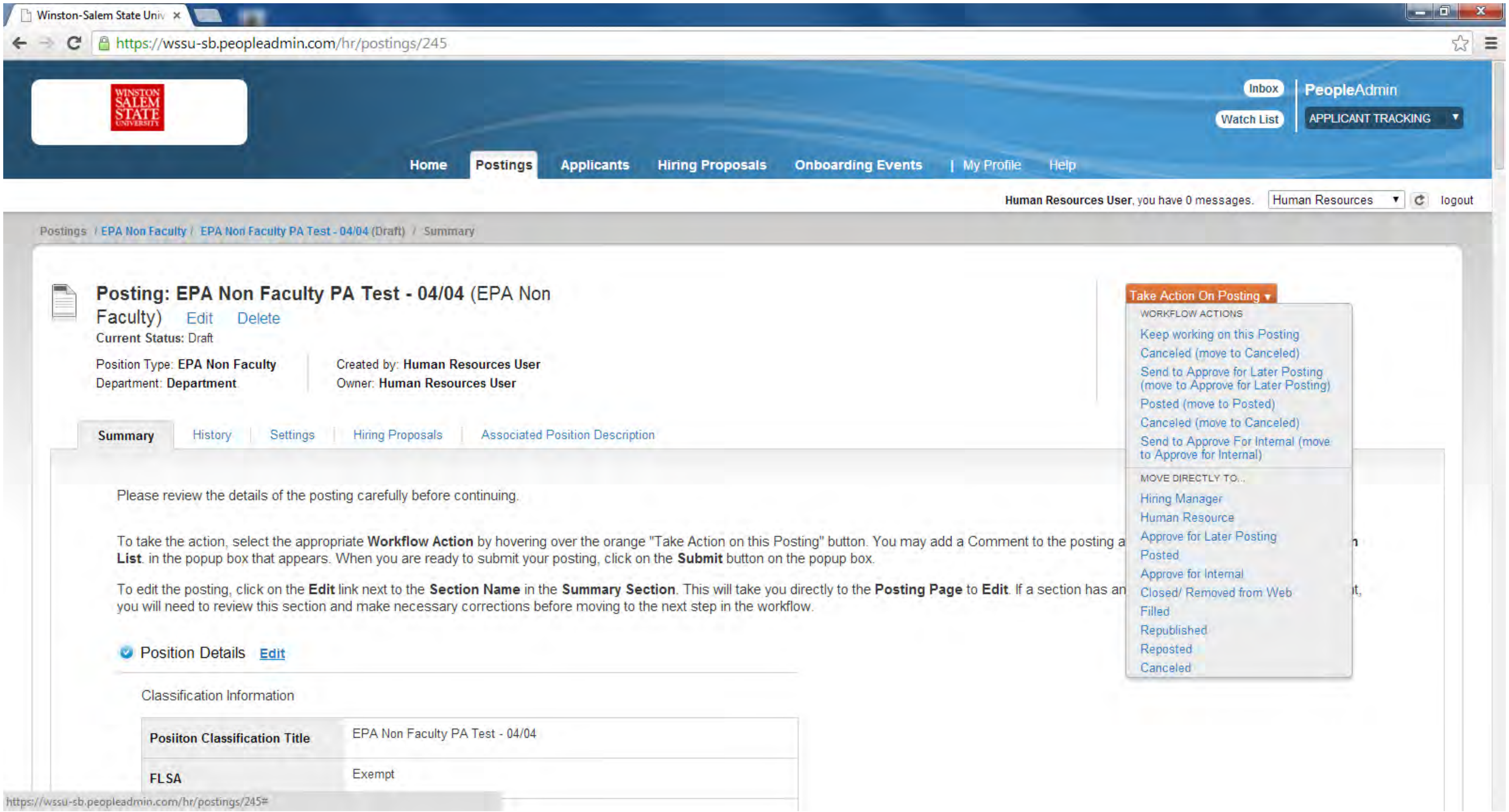

Fig 47: EPA Non Faculty Posting Created and Posted

[Workflow]

To move the posting along in the workflow, hover over the orange *Take Action on Posting* button and choose the action that you would like to take.

When you transition the requisition, you will have the opportunity to add a comment, which will appear in both the email that the state owner receives and in the history of the requisition. You can also flag it to appear on your watch list and this will display the requisition in the Watch List on your home screen.

[Applicant Portal]

- **See Chalk board for Applicant Link**
- Create an account and apply to the postings you created.
- The first time that an applicant applies to a job, they will be prompted to fill out the Voluntary Demographic information. This will only happen once. If the applicant wants to adjust their demographic data, this can be done at any time from the menu on the left. Check preferences to see if they are prompting for demographic at end of app otherwise remove bullet point.

SPA Applicant Workflow

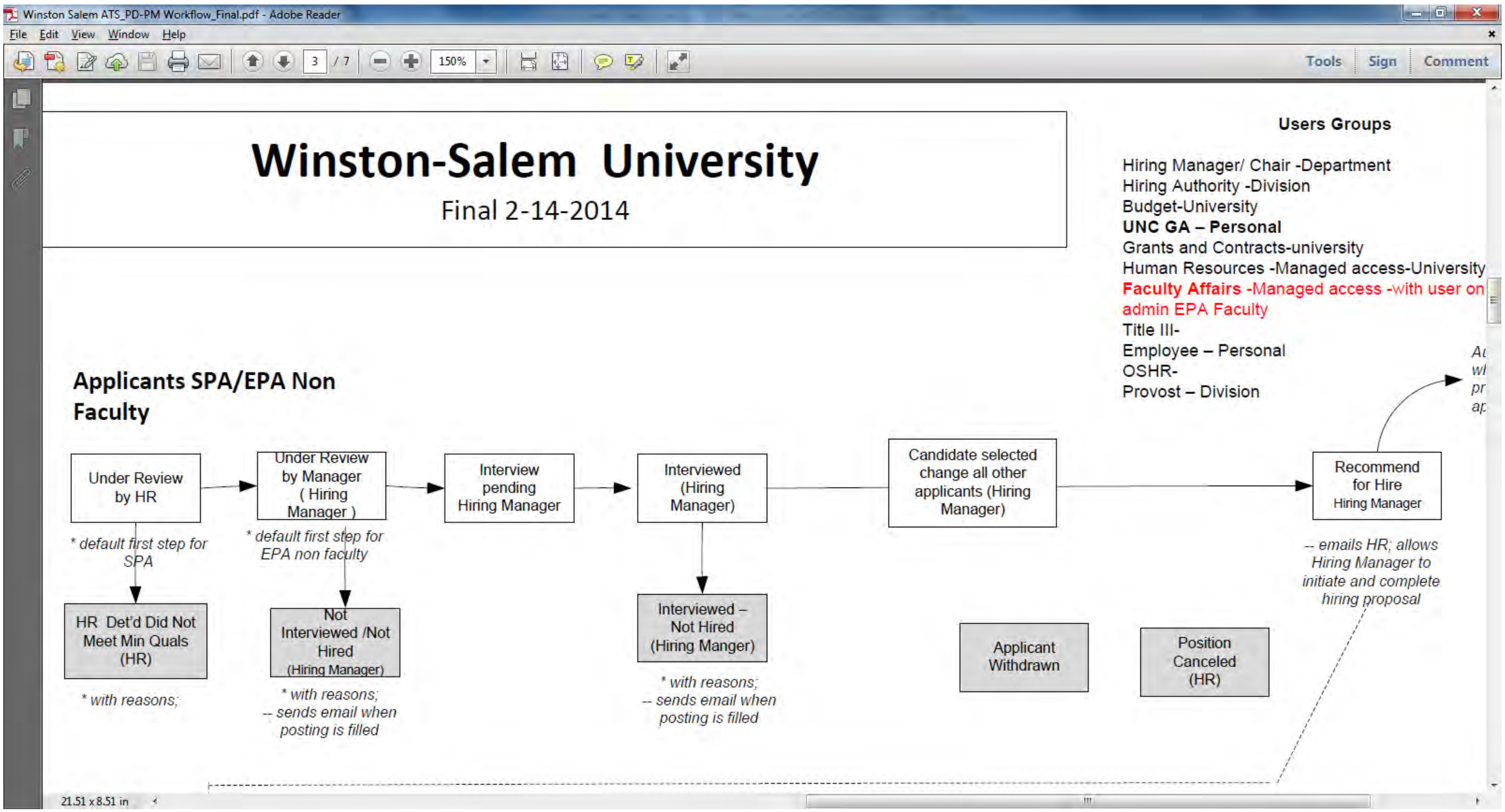

Fig 48: SPA Applicant Workflow

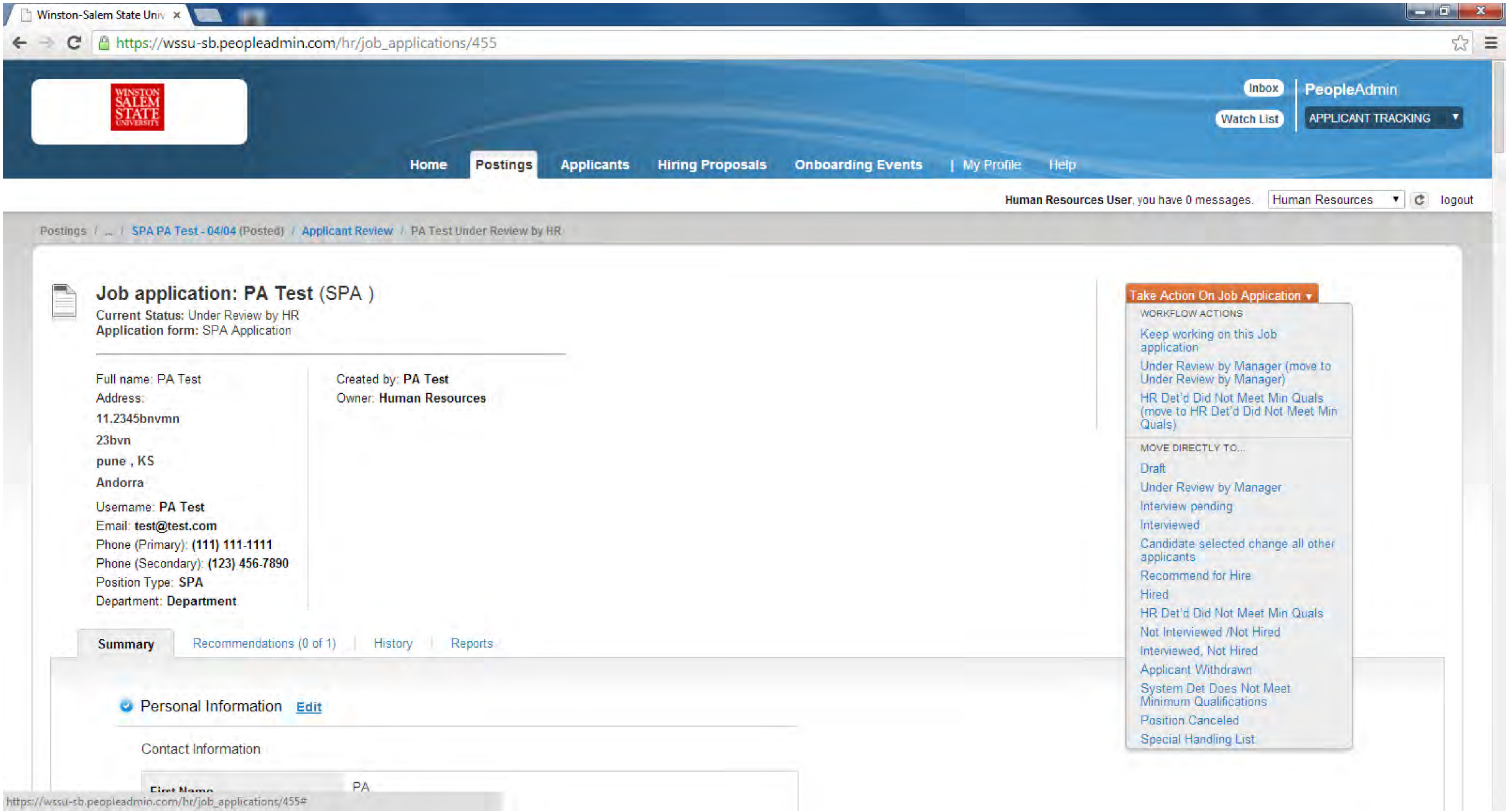

Fig 49: SPA Job Application details

[Workflow]

To move the applicant along in the workflow, hover over the orange *Take Action on Job Application* button and choose the action that you would like to take.

You will also be able to return to the previous owner or skip ahead in the process in some instances, if specified in workflow. Be sure to test all possible cases [see attached test plan].

EPA - Faculty Applicant Workflow

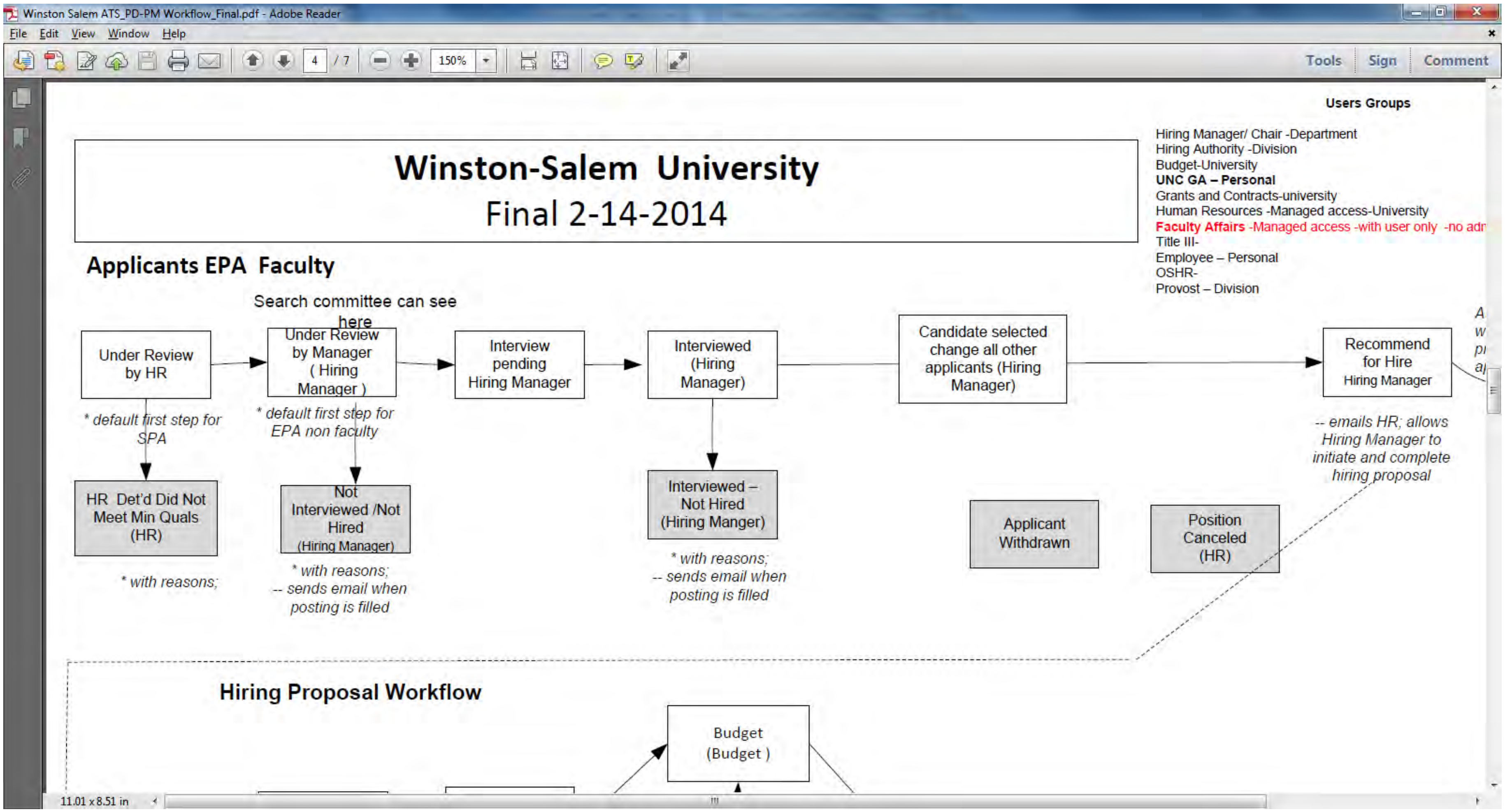

Fig 50: EPA - Faculty Applicant Workflow

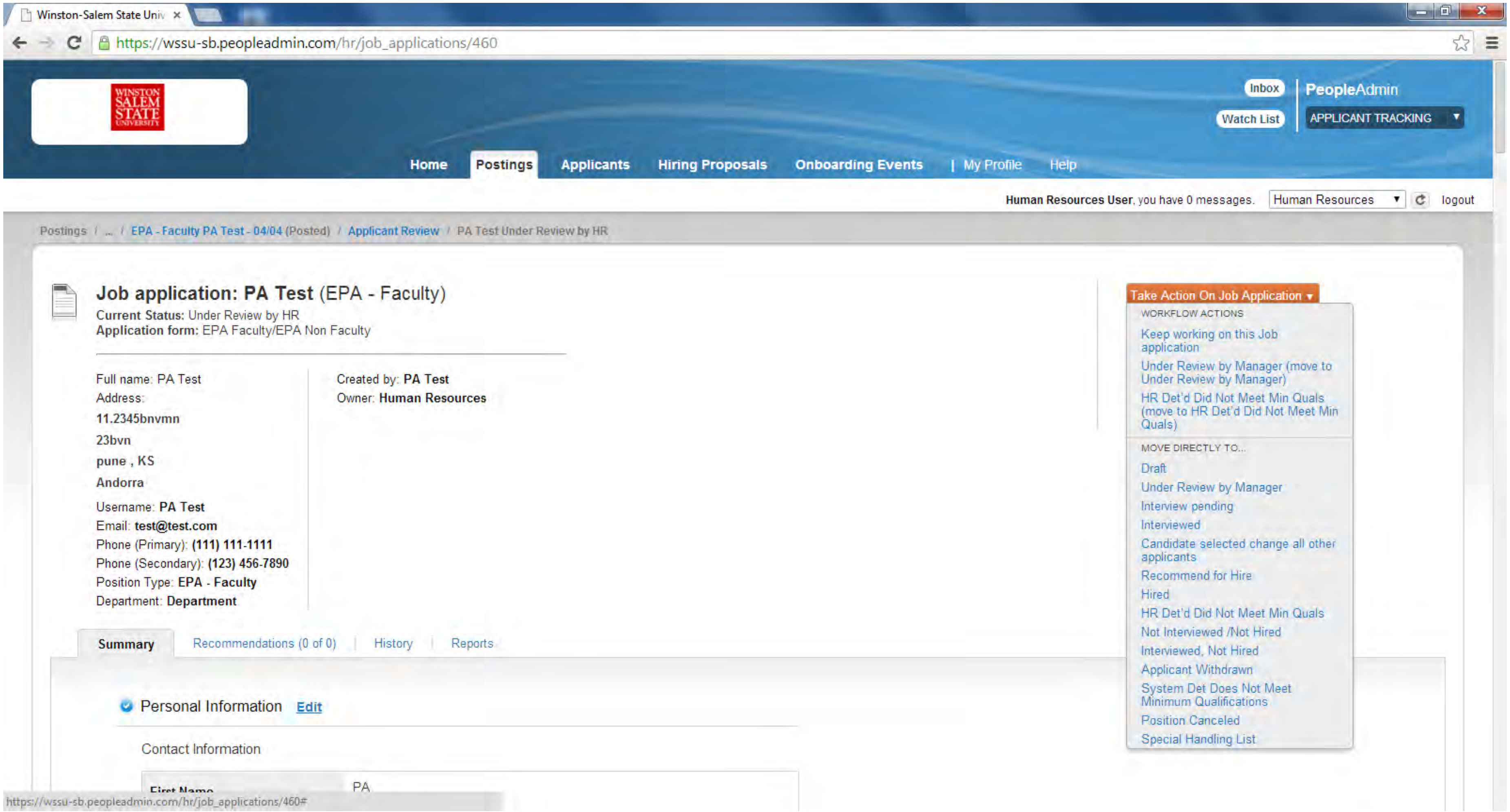

Fig 51: EPA - Faculty Job Application details

[Workflow]

To move the applicant along in the workflow, hover over the orange *Take Action on Job Application* button and choose the action that you would like to take.

You will also be able to return to the previous owner or skip ahead in the process in some instances, if specified in workflow. Be sure to test all possible cases [see attached test plan].

EPA Non Faculty Applicant Workflow

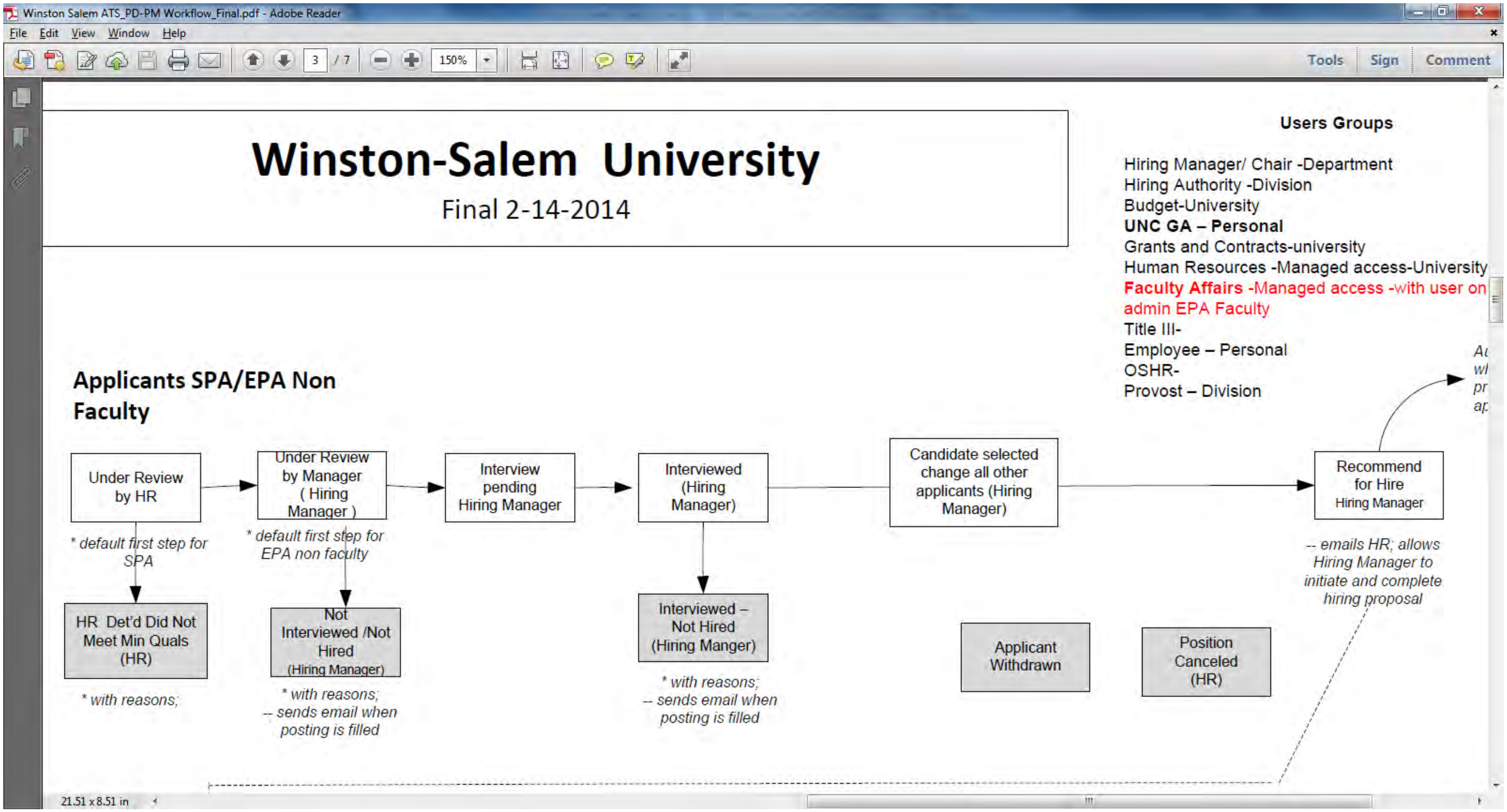

Fig 52: EPA Non Faculty Applicant Workflow

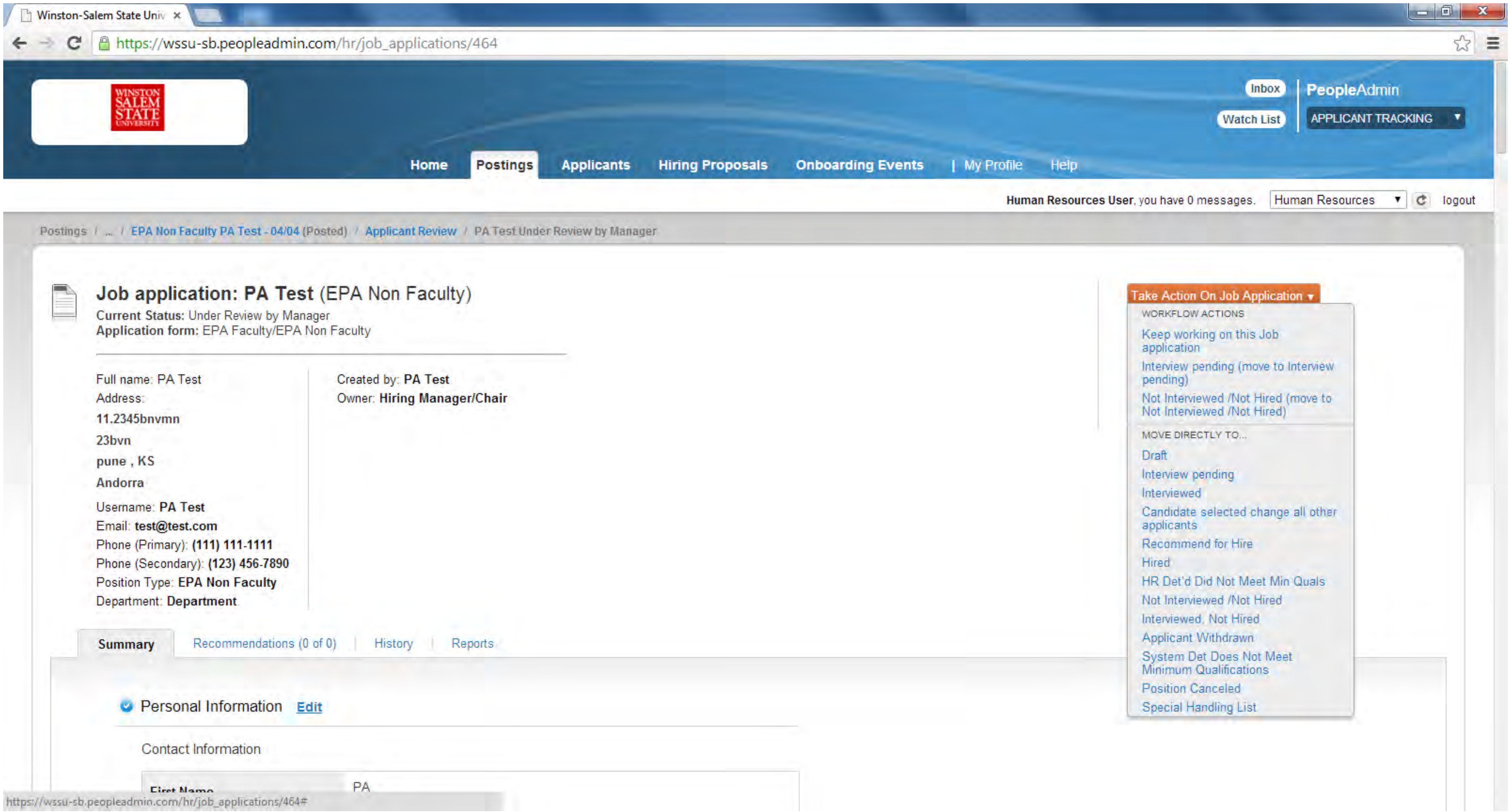

Fig 53: EPA Non Faculty Job Application details

[Workflow]

To move the applicant along in the workflow, hover over the orange *Take Action on Job Application* button and choose the action that you would like to take.

You will also be able to return to the previous owner or skip ahead in the process in some instances, if specified in workflow. Be sure to test all possible cases [see attached test plan].

Hiring Proposal

To create a hiring proposal, once the applicant is in the appropriate state to start a hiring proposal. You will see a link appear to start a hiring proposal in the upper right hand side of the summary screen for that application. A green plus will be beside the link. Once you click the link the system will take you to the settings page for that hiring proposal.

[Search Hiring Proposals]

Hover over the *Hiring Proposals* tab and click the *Staff* option.
This takes you into the Staff Hiring Proposals list screen where you can manage existing hiring proposals.

- **General Actions:** Hover over the grey *Actions* button where you have the following options:
  Export Results: Export the current list view into an Excel document
  Move in Workflow: Move all selected hiring proposals to a specific workflow state
- **View/Edit existing Hiring Proposals:** Hover over the *Actions* link and click one of the following options:
  View: View selected hiring proposal (can also do so by clicking the blue link in the left column of the list)
  Edit: Edit selected hiring proposal

[Process]

[Initial Page]

The initial page displays the Applicant Name and Position Title. Review the information and hit *Start Hiring Proposal.*

If a Hiring Proposal already exists for this applicant you will receive the following warning: This Applicant already has a Hiring Proposal in process.

[Hiring Proposal]

Fill out the necessary fields. All applicant and position information should auto-fill and it not editable within the Hiring Proposal. If you need to change the information, do so within the applicant record or position record. Click Next.

[Hiring Proposal Summary]

On the summary page you can review the hiring proposal and see a print preview of the hiring proposal.

[Workflow]

To move the hiring proposal along in the workflow, hover over the orange *Take Action on Hiring Proposal* button and choose the action that you would like to take.

When you transition the hiring proposal, you will have the opportunity to add a comment, which will appear in both the email that the state owner receives and in the history of the hiring proposal. You can also flag it to appear on your watch list and this will display the hiring proposal in the Watch List on your home screen.

SPA Hiring Proposal

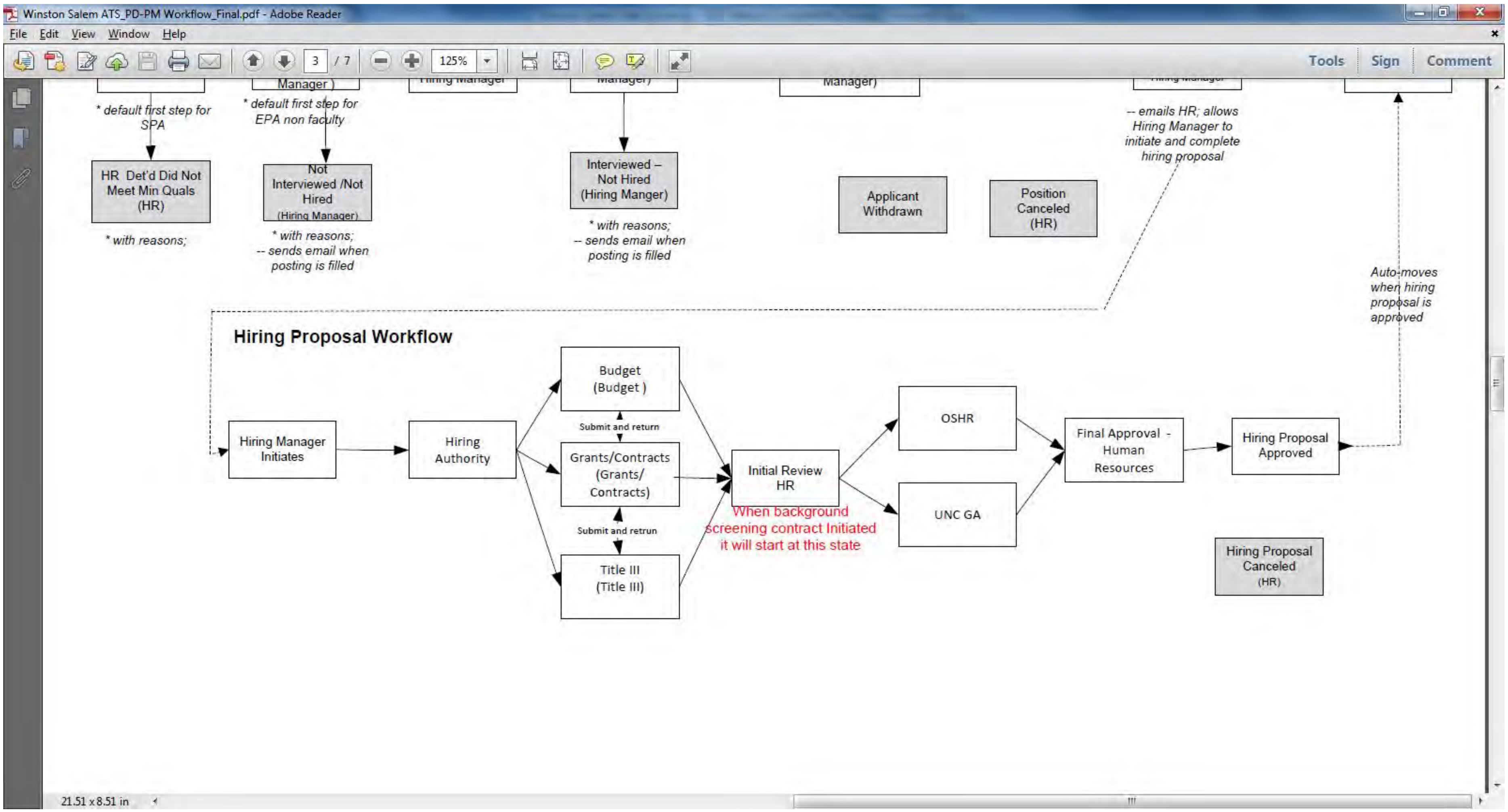

Fig 54: SPA Hiring Proposal Workflow

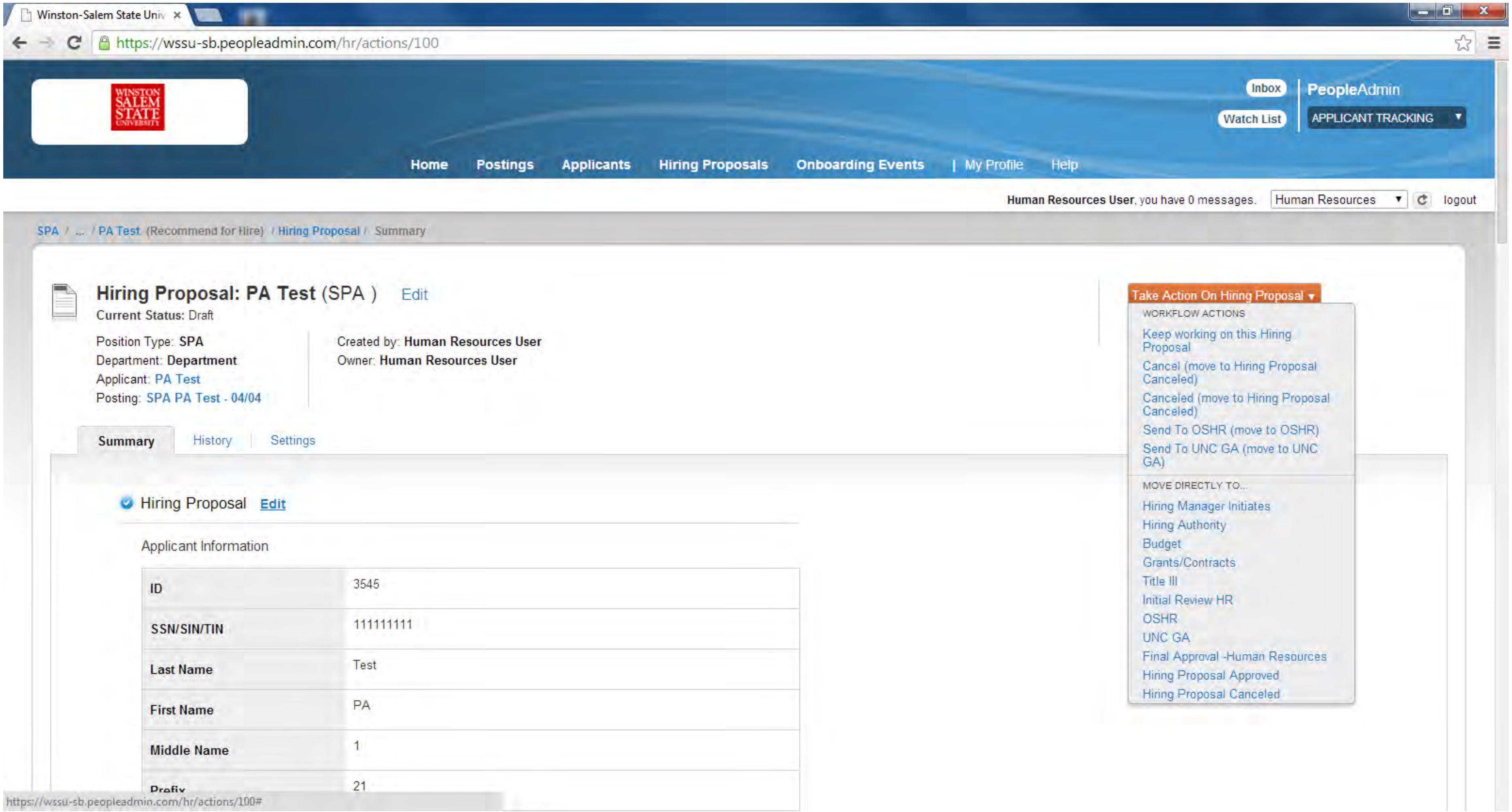

Fig 55: SPA Hiring Proposal details

[Workflow]

To move the hiring proposal along in the workflow, hover over the orange *Take Action on Hiring Proposal* button and choose the action that you would like to take.

When you transition the hiring proposal, you will have the opportunity to add a comment, which will appear in both the email that the state owner receives and in the history of the hiring proposal. You can also flag it to appear on your watch list and this will display the hiring proposal in the Watch List on your home screen.

EPA - Faculty Hiring Proposal

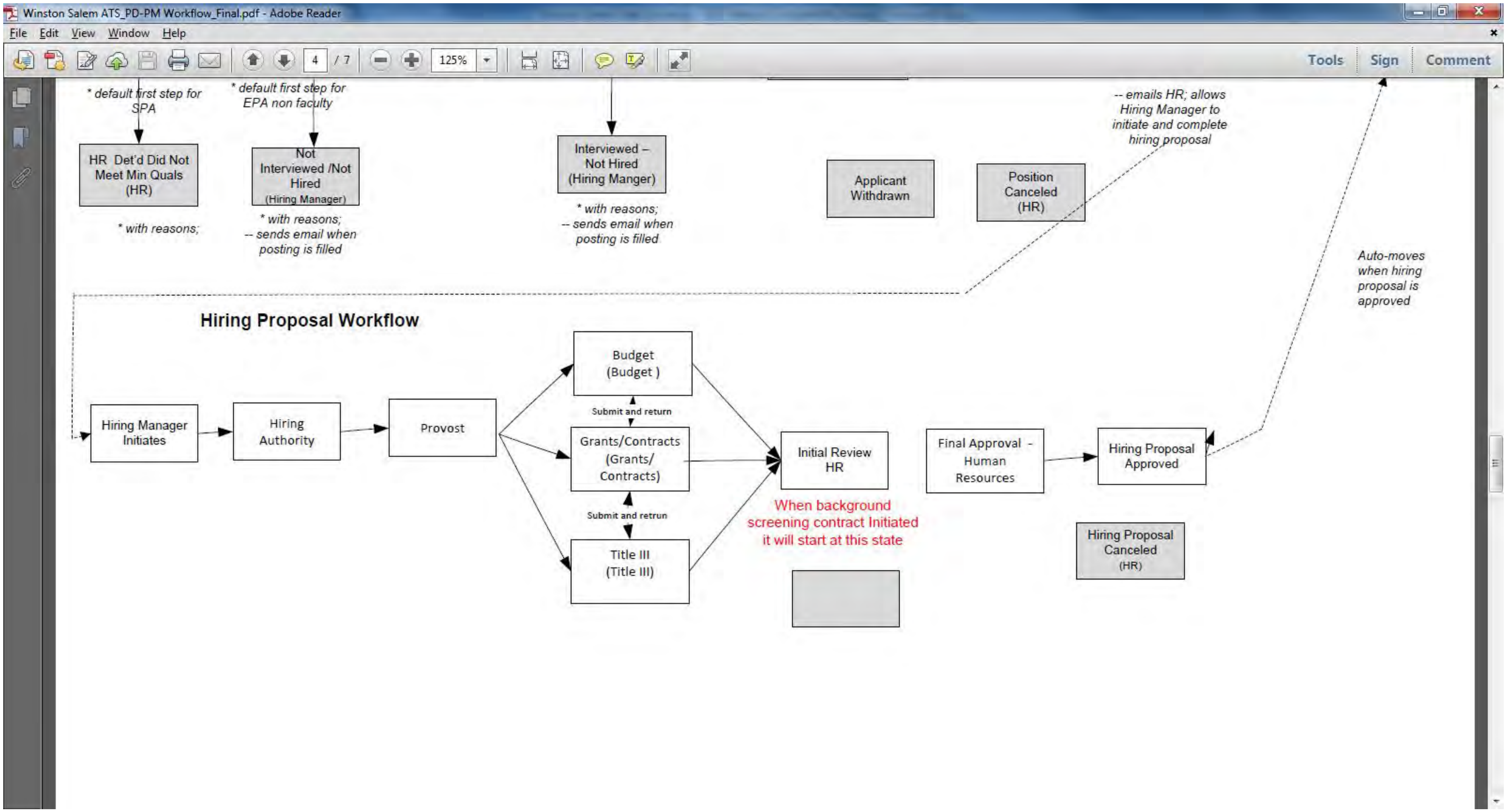

Fig 56: EPA - Faculty Hiring Proposal Workflow

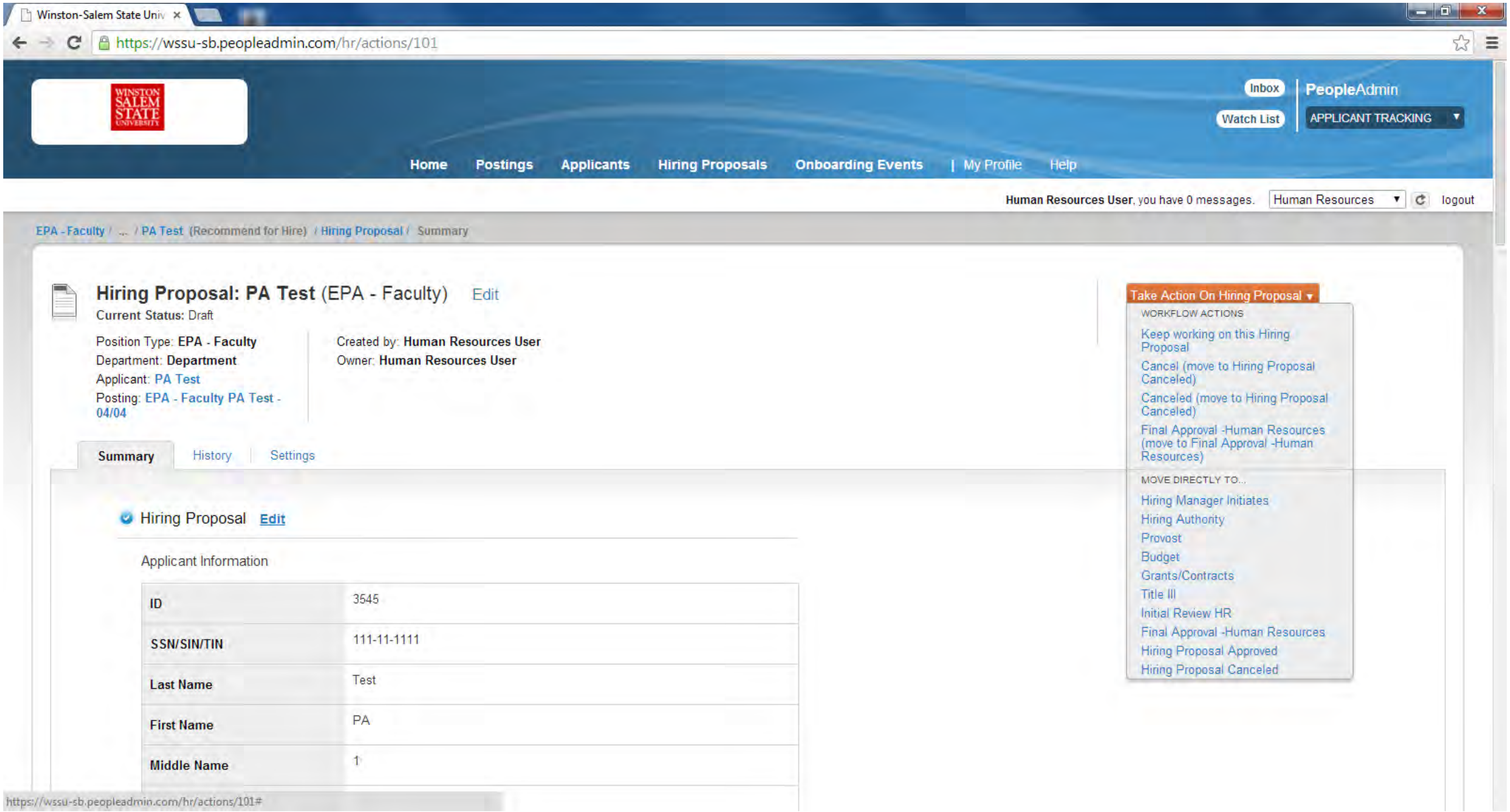

Fig 57: EPA - Faculty Hiring Proposal details

[Workflow]

To move the hiring proposal along in the workflow, hover over the orange *Take Action on Hiring Proposal* button and choose the action that you would like to take.

When you transition the hiring proposal, you will have the opportunity to add a comment, which will appear in both the email that the state owner receives and in the history of the hiring proposal. You can also flag it to appear on your watch list and this will display the hiring proposal in the Watch List on your home screen.

EPA Non Faculty Hiring Proposal

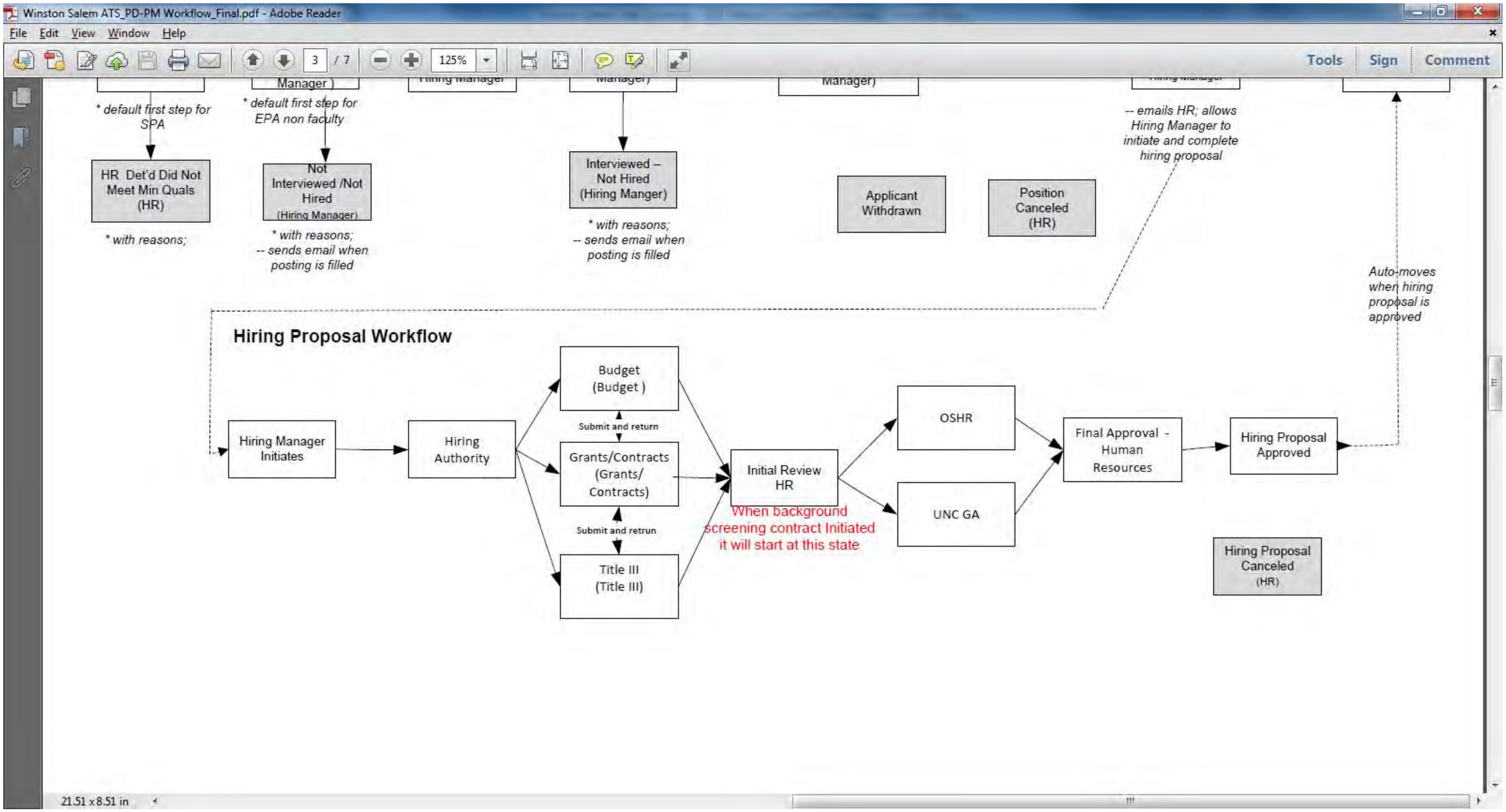

Fig 58: EPA Non Faculty Hiring Proposal Workflow

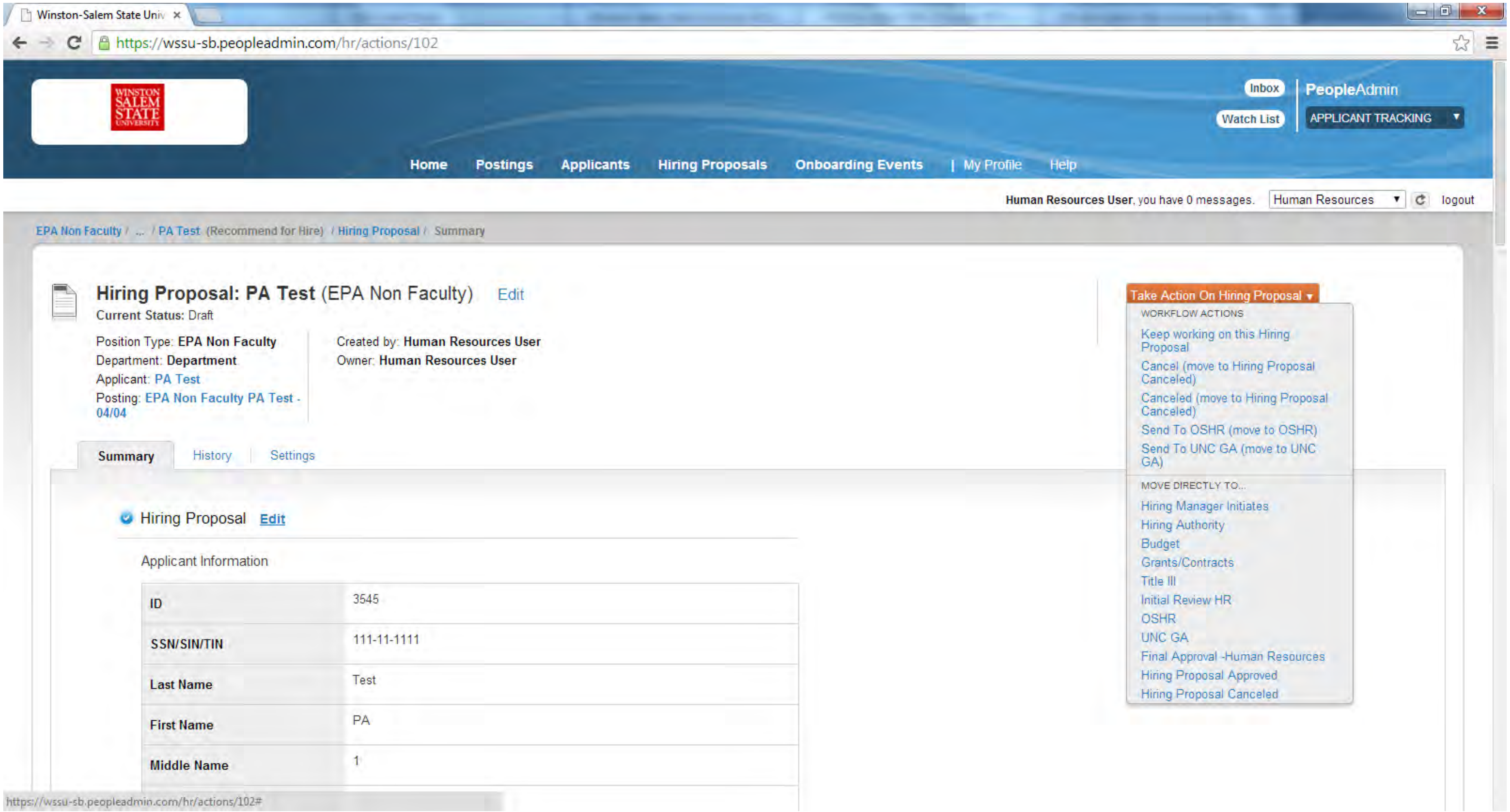

Fig 59: EPA Non Faculty Hiring Proposal details

[Workflow]

To move the hiring proposal along in the workflow, hover over the orange *Take Action on Hiring Proposal* button and choose the action that you would like to take.

When you transition the hiring proposal, you will have the opportunity to add a comment, which will appear in both the email that the state owner receives and in the history of the hiring proposal. You can also flag it to appear on your watch list and this will display the hiring proposal in the Watch List on your home screen.

[Final Steps]

Once the hiring proposal is approved, the applicant is moved into the *Hired* status. HR must then go back into the posting and mark it as *Filled*.