# SpartanTalent User Guide & Workbook

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Objectives
This document will guide you through the business processes in the system. It will lay the foundation for you to be able to understand how ePosition functions and to help you understand how business processes are achieved. At the end of this guide you will have accomplished the following things:

- Created and approve a request for a new Position Description.
- Searched for and modify a Position Description.
- Create and post a new Posting.
- Apply to a Posting.
- Review Applicants.
- Created and approved by a Hiring Proposal to hire an Applicant.

Logging In
Open your browser and go to (www.spartantalent.uncg.edu) to log in.

Username: XXXX
Password: XXXX

Login with the credentials provided to you at site delivery.
**Things to know about logging in:**

Users will login using their own University username and password. Guest Users will log-in using the username and password that the Initiator of the Posting provides them.

**Requesting a username or change to current employee account:** New users can request an account by selecting the Request/Update an account link. The new account is created at the “pending” status. The system will send an email to the System Administrator in Human Resources, who will have to approve the account before the new user can log in. Current users with an account can also request a change, i.e. add or remove an organization.

**UNCG User Login Only:** UNCG Employees who have been assigned a user account will click here to login. The UNCG Authentication screen will then appear where the appropriate University credentials can be entered.

**Applicant Login Only:** This is to direct applicants from the User Portal to the Applicant Portal.

**Guest User Login Only:** Guest Users can view the forms (posting, hiring proposal, and application materials). Each guest username is system generated and unique to each posting. These credentials are posting specific only. Guest User can be used in lieu of the Search Committee Member user group. The username and password can be provided by the Initiator of the posting.

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**Home Page**

When you log in, you come to the home page. The menu and other options available to you correspond to your user permissions.

**Things to know about the Home page:**

**User Group Selection** (next to the logout link in the upper right corner of the screen): This menu is only available if you are assigned more than one permission group. It allows you to change the permission group you are using at the moment.

**Inbox:** This notification area displays any items that you need to act upon.

**Watch List:** This notification area displays any items that you have flagged as worth watching – for example, you may have an interest in following a job posting for a position outside your own group. We will see this later on in the demo.

The tabs you see in the Inbox and Watch List areas will depend on your user permissions.

You can quickly access your inbox and watch list from any page with the Inbox and Watch List button at the top of the screen.

**Shortcuts:** This section displays shortcuts that depend on your user permissions. This is not a configurable area.

**My links:** This section is a good resource for training videos and quick access to the applicant portal. You can also quickly get to the PeopleAdmin customer portal, where you have access to information and other resources. This area is configurable. The links can be updated to reflect important information about your organization and your PeopleAdmin system.

**Module Selection:** At the top right part of the screen, the module drop-down shows which part of the system you are in right now. When you log in, you are in the Applicant Tracking module. If you hover your mouse over the words “Applicant Tracking” you will see the modules available to you. The modules available depend on your user permissions and the way your system is configured.

The Home page appears in all modules, with a different color bar at the top for each module. You’ll return to the Home page whenever you change to a different module.

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**Module Type Definitions**
User Group Definitions

Employee: Able to view assigned position descriptions.

Initiator: Able to initiate a position action, posting, or hiring proposal in the Applicant Tracking and Position Management modules. Has the capability to view those actions that he or she has created and/or those where he or she has been designated an additional Initiator. This can occur for those Initiators within the same organization.

Department Approver: Can view all Departmental actions in all modules at all times. Needs to take action on those items that requests approval at the Department level. By taking action on an item, the Dept. Approver will have the ability to send onto the Executive Approver OR if an additional approver is needed first, then an option for an Additional Approver will be available as well. The Additional Approver will be a Group Member prompt, where an approvers name can be selected for approval.

Additional Approver: Group member prompt of users within the organization who are assigned to be additional approvers. This level of approval will need to transition to the Executive Approver.

Executive Approver: Approves actions at the Division level.

Grants-Funded/PI: Reviews and approves grant funded position actions.

Budget: Reviews and approves actions for budget confirmation.

Search Committee Member: Invited by Initiator to participate in review of candidates and/or interviews. Members for searches should added when the postings are initiated by the Initiator.

**Please note: Individuals may have only one user group or may be assigned to more, depending on their role within the approval process for actions. **
**Position Management (ePosition Management)**

Hover over the module selection drop-down menu and select POSITION MANAGEMENT. In this area you will be able to select and view Classifications and Position Descriptions.

Toggle to and select the Position Management interface.

The header bar will turn orange when this is completed.

Be sure the user group is Initiator to start the process.

To view general classifications of positions, hover over the classifications tab and select EHRA, SHRA, or Faculty.
Select your classification based on the repository of classifications

View/copy minimum qualifications
To view existing position descriptions, go to Position Descriptions drop down list and select the type of position type to be viewed (SHRA, EHRA, Temporary or Faculty). The position type actions will list any previously initiated actions that are pending in the workflow and/or approved for each position type.
**Position Descriptions**

Positions are created or modified by performing position requests.

Hover over the **Position Descriptions** tab and select the appropriate position type. This takes you into the Position Description list screen where you can create new Position Descriptions or modify existing Position Descriptions through position requests.

**View existing Position Description**

From the summary screen you can select on a position you wish to view. If you do not see the position description you are looking to review, contact your Human Resources Talent Consultant for help.

**Create a New Position Description**

Navigate to the appropriate position type, the same way you navigated to view a position description, click the orange **Create New Position Description** button. You’ll be able to start a new position request. For this example, a new SHRA position is being established. Each position type may slightly request different
information and have different sections. However, the process still functions the same way.

**Initial Page:** Enter a position title and then select the location, division and department if necessary. Click **Start Action**.
Identify Action Request. If a recruitment search is planned after the position action approval, then the option to "Request to Post" should be selected as well. Multiple options can be selected from the list provided.

Select the appropriate classification from the list provided.

Enter position details, such as: Number of months, FTE, Work hours, Primary purpose of the Org Unit, Primary purpose of the position... etc.

Viewing capability only for Initiators.

Add all of the key responsibilities of the position.

Provide the budget information.

Provide the competency title, the appropriate competency level and the corresponding description. Link is provided. Please use the descriptions at this link.

Select Supervisor's position from the list provided.

Documents can be uploaded to the system to file with the approved position description.
When there is a blue check icon located in the row, this indicates that all the required fields are completed in the section. An action cannot be submitted for approval until all the sections have a check.

**Action Requested:** Select the request change; Create New Position, Request to Post or both. Please provide a summary that gives a reason for the request.

**Classification:** Search for and choose the classification from the list provided this position description should be tied to. Click **Next**. As the request goes through the workflow, users will be able to see the classification selected. Human Resources will have the ability to change the selected classification if necessary. A discussion will take place with the requesting Department before any classification changes occur.
**Position Details:** Fill in the position and Departmental information on the form and click **Next**. The majority of the information entered in the description is going to feed directly into the posting. It is important this information is provided when the position is created or modified, before the recruitment in the Applicant Tracking System (UNCGjobsearch) begins.
**Regulatory Codes**: Can be viewed by Initiators only. This section houses the UNC Systems Office codes, as well as, the EEO information, which includes the underutilization of minority groups data. Moving forward, the HR Talent Consultant will complete this section and when the position request is approved and the posting is being initiated, this information will be visible to the Initiator. Initiators will be aware of any underutilization present in any minority group.

**Key Responsibilities**: List the positions key duties and responsibilities and the essential tasks that included in those responsibilities. Each key responsibility MUST have a percentage. The total percentages must equal 100%. No more than 8 and no less than 4 should be entered. This is a building block section, which means to add a new entry you need to select the Add Key Responsibilities Entry button each time. To remove an entry, check the Remove Entry Box, below the entry you wish to remove and Save.
Position Budget Information: Fill in the information on the form and click Next. This is a required step. If it is a grant funded position please be sure to check the box asking if the position is grant funded. This is another builder block section that works the same as the Key Responsibilities does.
**Competencies:** Enter each competency and the appropriate competency level description, needed for the position. A link is provided in this section to view the competencies for all SHRA classifications at UNCG. Please use the accurate competency and description regulated by the NC Office of Human Resources and the UNC Systems Officer. This is yet again another builder block section. To keep adding competencies, select the Add Competency Entry button.
**Supervisor:** Here you can search for and choose the position that supervises the position you are creating. This will build a hierarchy in the system. If you need to search for your position, you can click on **Filter These Results** to perform your search.

**Position Documents:** Users viewing and approving this request during the process, have the capability to upload documents to this file using this section. For all position action requests an update Org Chart is required. For example, the org chart should be uploaded in this section.

**Summary page:** Review the position description information. Scroll down to view the entire position description.

Click on **Take Action on Position Request** to move the position request in workflow to ensure that all approvers that need to see the position for approval before approving and adding this new position into the position library.
*Please note, to save this request and submit later, please select ‘Keep working on this action’. If there are additional approvers within the department, you will need to select the appropriate action per the workflow.

You will receive a blue bar on the top of your page that will state the action was successfully transitioned. If you get a red bar with an error, then the system is telling you something is missing or incorrect and it needs to be fixed. The error will tell the initiator what is needed in order to transition the position request. Once all errors have been remedied, then take another action and send to the appropriate approver.
Modify a Position Description

Hover over the **Position Descriptions** tab and select the appropriate position type. This takes you into the Position Description list screen where you can create new Position Descriptions or modify existing Position Descriptions through position requests. For this example an EHRA position is being modified. Each position type may slightly request different information and have different sections. However, the process still functions the same way.

Click on the **Position Descriptions** tab, then [to locate the position you wish to modify. Click on **Actions** to view the position.}
Click on **Modify Position Description** in the upper right part of the page.

Click **Start** on the next page.

After filling out the form information, you can select the employee to seat in this position.

**Action Requested:** Select the request change/modification request. More than one request can be selected.
All the other tabs are similar to what was explained in Creating a New Position, except for the Action requested screen.

Move the Modify Position Request through the workflow the same as you did for creating a new position.

**Position Description Requests**

To work with position requests, hover over the **Position Descriptions** tab to open its menu, and select **EHRA Actions** or **SHRA Actions**. You can see and search for existing position requests, or create a new request. You can make the following requests and select more than one at a time:

- Posting
- Reclassification (SHRA)
- Comp Level Change
- Move position from SHRA to EHRA
- Supervisor Change
- Title Change (EHRA)
- Salary Change
  - *Permanent:* You must provide written justification for change (i.e. duties change, org restructure, market rate, etc.)
  - *Temporary:* Enter end date in “Enter end date if it is a temporary increase”

- Abolish Position
- Other (i.e. Interim Appointments)
To move the request along in the workflow, hover over the orange Take Action on Action button and choose the action that you would like to take.

When you transition the action, 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 action. You can also flag it to appear on your watch list and this will display the actions in the Watch List on your home screen.

To find actions again, hover over the position description menu item and select the Main Position Requests link it to see all position requests.

**Applicant Tracking (UNCGjobsearch)**

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

**Postings**

Hover over the Postings tab and click the position type option specific to your application (EHRA or SHRA). This takes you into the Postings list screen where you can create new postings or manage existing postings.

Hover over the orange Actions button to access general actions related to postings.

**General actions available from the list of postings:**

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
Connect Postings: This allows you to connect postings together to move applicants from one posting to another. This will be discussed further in your implementation.
Connect Pools: This allows you to connect a posting to a pool so that applicants on a pool may be moved to the
connected posting. This will be discussed further in your implementation.

**View/Edit existing Postings**

Hover over the **Actions** link associated with a specific posting and you will see 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.

**Choices for creating postings:**

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. Hover over the Actions link and choose Create From or View the listing and create posting from the summary screen]
Posting 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 Functional Title on this page.

- Choose the Location, Division, and Department where this posting will exist. (Note: if you create from a previous posting or from position description this information will autofill)
- Choose the initial Workflow State an applicant will be set to when applying to this posting. This allows you to determine on a posting by posting basis if HR should initially screen applicants.
- If you want to use the reference letter function, select the dropdown for **Recommendation Document Type** and select **Reference Letter**. You can choose to have emails sent at specific times and specify the required document using the **Reference Notification** and **Recommendation Workflow** dropdown arrows.
- Select whether to **Accept online applications**. (Not shown.) This is typically checked. If you do not check this item, applicants will still see the posting advertised on your portal but they will not have the ability to apply online through the portal. If you uncheck this item, you should provide instructions for the applicant on how to apply.
- Click the orange **Create New Posting** button.
Posting Details: Fill out the fields. Any field marked with a red asterisk is a required field. Click Next.

Key Responsibilities: Complete the Key Responsibilities field by adding a Key Responsibility and the corresponding Essential Tasks within that responsibility. Provide a weight, in percentage, of the amount of time the position will complete this task as part of their regular job. Click the Add Key Responsibility task and complete for each key responsibility the position will be required to perform. Ensure that regardless of the amount of Key Responsibilities added, the total percentage of all key responsibilities must add up to 100%.
ADA Checklist: Select the essential physical and work environment conditions and provide a correlating percentage for the amount of time these tasks are expected to be performed.

Custom Communications: This screen allows for custom email communications to applicants in various stages of the application and screening process. Orange Asterisks indicate required fields.
**Internal Documents:** This allows an initiator to attach additional documents to the posting for consideration during the approval process. These documents are configurable and you will be able to choose what documents you would like to attach on postings.
Applicant documents: Here you can choose which documents for the applicant to include and change the order in which they are listed. To have a document be optional, click only Optional. To require the document, you must click the Required box.

References: This section is where you can specify whether to allow references. This section is here even if you do not choose to accept references in the settings page. It should be left blank if not soliciting references for this posting.
**Supplemental Questions:** This allows you to add more 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 add 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.

**Guest user:** In this tab you can create a new guest user. Select **Create Guest User** (not shown)

This will create a generic username and password that you can give guests to have view only access the posting. You can enter in email addresses and email containing the guest user login credentials will be sent
Search Committee: You can assign members to the search committee on this page. Click the Add Existing User button. 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.

Ranking Criteria: These are evaluative questions you can add to the posting. These can be used during the candidate process to rank applicants. When you click the Add a Criterion button, you will have the ability to add a new criterion or select an existing criterion. To choose which state the criterion is associated with.
with, you can select the description from the table and you will be presented with the opportunity to change the workflow state, add a weight and add points to this question. Once you have made your changes, you must click the **Save** button to save them.

**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. You can also move the posting in workflow for its approvals as necessary.

**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 posting, 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**

Go to [https://jobsearch.uncg.edu/hr/sessions/new](https://jobsearch.uncg.edu/hr/sessions/new), 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.

**Review Applicants**

You can review applicants by posting, or you can locate specific applicants without locating the postings to which they have applied.

**Applicant Review by Posting**

Navigate to the posting where you wish to review applicants. To do this, hover over the **Postings** tab and then select **EHRA** or **SHRA** position type under it. You will be brought to the postings search screen. Search for the posting you wish to view. Once in the posting click the **Applicants** tab in the summary screen of the posting to see a listing of applicants applied to this posting.
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 steps in the workflow.

Search Applicants
Hover over the Applicants tab and search applicants by clicking Applicant Search. The applicant search allows you to see all applicant accounts in the system. When viewing an individual applicant you will be able to see all postings that applicant has applied to. You may also perform a search of applications by clicking the Applications option for the position type you want to search within. This will take you into the list view for each option. NOTE: These searches are typically only available to Human Resources or Administrative users. These are global cross posting searches. Each departmental user will typically only see applicants on the postings they have access to.

Application Search
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 applicants to a specific workflow state
- Email Applicants: Send a bulk email out to selected applicants
- Download applications as PDF.

View Applications: Hover over the Actions link next to a specific application and click the View option.

Applicant Search
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
● Email Applicants about another position: Send a bulk email out to selected applicants about another position

View/Edit existing Applicant: Hover over the Actions link and click one of the following options:

● View Applicant: View selected applicant (You can also view the applicant by clicking on the blue Last Name link in the left column)

● Edit Applicant: Edit the Login and Contact Information for the applicant

By hovering over the ACTIONS tab in the list of applicants, you can complete the following actions:
**Hiring Proposal**
When an applicant is selected, the next step is the hiring proposal. There are two sections below. One for if your hiring proposal updates a position description and one if it does not.

**Creating a Hiring Proposal that updates a Position**
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 a search page for position descriptions. If your posting was created from a position description the name will appear at near top of the page under “Selected Position Description”. If you want to hire into a different position description or if your posting was not created from a position description you can search and choose the position description to hire into. Click the Select Position Description button to start the hiring proposal. NOTE: If you do not use the position description module you will not see this screen.

![Image of position description screen]

NOTE: 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 is 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.

You can then move the hiring proposal through the workflow until it is approved. At that point the applicant is seated as an employee into the position.

**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.

---

**Creating a Hiring Proposal that does not update a Position**

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.
**Hiring Proposal:** The system will take you into the form of the hiring proposal. Fill out the necessary fields. All applicant and position information should auto-fill and is not editable within the Hiring Proposal. If you need to change the information, do so within the applicant record or position record. Click **Next**.

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

You can then move the hiring proposal through the workflow until it is approved. At that point the applicant is seated as an employee into the position.

**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.

**Search and Manage Hiring Proposals**
Hover over the **Hiring Proposals** tab and click the **Main** option. This takes you into the Main 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 next to a specific applicant 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 (only if it is NOT in a final/approved workflow state)
**Performance Management (ePerformance)**
Hover over the module selection drop-down menu and select Performance Management.

COMING SOON!

**Onboarding (eOnboarding)**
Hover over the module selection drop-down menu and select Onboarding.

COMING SOON!