Instructions for Approvers in Career Zone Effective 8-1-12

Contents

Steps to Initiate Requisition Approval

Once the fields of the req form have been completed by the requisition creator, users initiate the approval process using a function called "Smart Approval".

➢ The person selected in the **Hiring Manager** field on the requisition (req) determines which approval hierarchy is populated

➢ The approval chain is pre-determined based on a combination of the supervisory and organizational hierarchy, as well as special rules which apply to certain colleges and divisions.

➢ Additional approvers can be added to the list, but no approvers can be removed

➢ It is important to note that once a req has been submitted for approval, edits can no longer be made to that req by the requisition creator, hiring manager, team or approvers (with the exception of edits to the requisition team which can be made by using the "update multiple reqs" function)

➢ Once a requisition is approved, it will need to be posted to the Applicant Talent Gateways by the Staff or Faculty Recruitment Offices. Posting in this system is not "automatic". This provides the ability for the recruiter to approve but then make minor changes to the job posting before it appears on the talent gateways.

The Approval and Posting Process Summary:

➢ A requisition creator must click the START WORKFLOW button at the bottom of the workflow box to start the workflow process
➢ While a req is out for approval, the req status is Pending
➢ Each approver in sequence receives an email containing a link where they can review the req details
➢ An approver can either APPROVE or DECLINE a req
➢ Approval and Decline comments are visible to the entire req team and other approvers. Secure information (such as the full salary amount) should not be put into the comments.
➢ A Declined requisition can be copied and re-submitted for approval by the creator of the req.
➢ Declined requisitions in this system are maintained in a "declined" folder for the creator. They are not purged from the system.
➢ The job status becomes Approved when it has been approved by all approvers in the approval list
➢ The job status does not change to OPEN until the recruiter posts the requisition to the talent gateway. Once it is open and posted, the applicants will be able to view the job on the talent gateways.

If you are an Approver and Have Recommended Changes to a Req

➢ You have the option to either Approver or Decline a Req
➢ **If a requisition is declined by an approver, the requisition creator can NOT make changes to the req. They must save the requisition as new, make changes and re-start the approval process. The copying of the requisition creates a new "BR" requisition number (similar to the "IRC" number in iRecruitment.**

HINT: If an approver only has minor edits to the requisition, rather than declining the requisition, they can put notes in the approval comments so that the recruiters can make the changes prior to posting. This will prevent the req creator from having to create a whole new requisition.

Requisition Approval Screen Shots

Start Workflow Box

- After the requisition creator enters their information to the requisition and clicks the SAVE and CONTINUE button, the Start Workflow box appears.
- At that point, they can no longer make requisition edits
- They can add additional approvers, but they cannot delete seeded approvers
- FYI notifications
- They can "START" the workflow
- The requisition is in "PENDING" status

Inserting an Additional Approver

Approval Email—Received from workflowmanager@trm.brassring.com

Email received from workflowmanager@trm.brassring.com **requesting you to approve.**

From:	workflowmanager@trm.brassring.com			Sent: Tue 7/31/2012 1:41 PM
To:	Gina Williams			
Cc:				
Subject:	Requisition 31BR - Imaging/Microscopy Technician requires approval.			

Requisition 31BR - Imaging/Microscopy Technician requires your approval.

[CLICK HERE]

If you experience a problem with the link above, please copy and paste the following link into your browser:
https://sn.brassring.com/maestroweb/default.aspx?clink=025483ff9cf4840d704f9c875c1529188c1c38

What you will see when you click on the link to approve: You typically do not have to log in to approve from the email.

> **IMPORTANT: Salary and Budget Information in the Requisition**
> Due to security considerations over salary information in the system, requisition creators and approvers are asked NOT to enter full salary details in the req. RATHER, they are asked to enter any information to the approvers about requisitions that will exceed salary budget.

The following note appears on the requisition:

> *If you anticipate making an offer which will exceed position budget, provide your justification as well as the funding source that will be utilized to permanently cover the difference in intended offer vs. budgeted salary. (i.e., How are you re-allocating your salary budgets to accommodate this?) Do not list specific offer salary amount in this field, but rather, indicate source of additional funding. Explanations and approvals at the requisition stage will facilitate future approvals of offers and EAF's.*
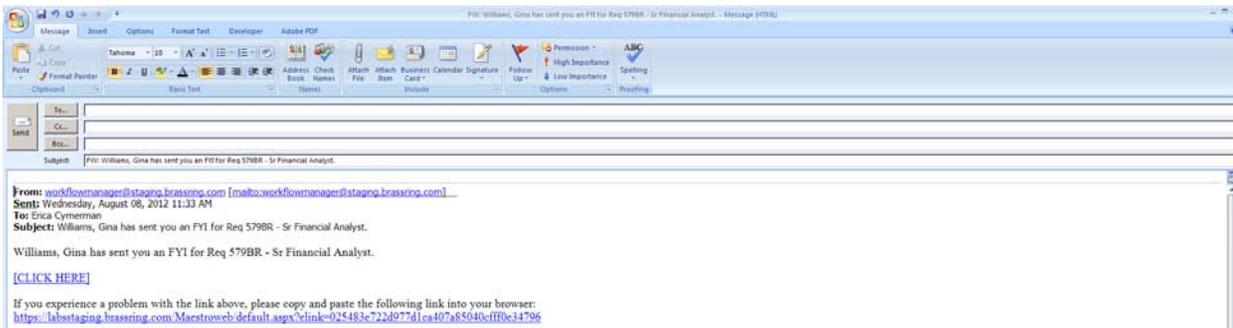
Adding an FYI approver

An FYI approver is someone who needs to be notified about the requisition but does not need to approve.

FYI approver notice can only be sent when someone is approving.

In smart approval, before you click the button to approve, you can go the section called: Insert Additional Approver

- **Search for the person who you want to send the FYI approval to,**
- **Highlight their name,**
- **Click the + sign next to "add fyi approver".**
- **Once you hit APPROVE, the FYI approval email message will be generated.**

The FYI approver will show up as a "comment" in the comments tab of the smart approvals screen.
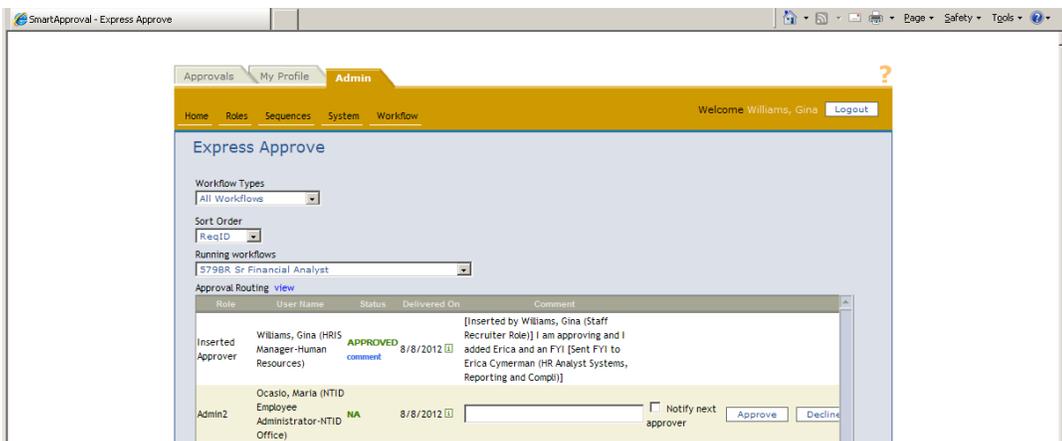
LOCATING A REQ THAT YOU NEED TO APPROVE, BUT YOU LOST YOUR EMAIL AND you are NOT on the req team and the req is not on your "My Reqs Pending" box

Log in to http://careers.rit.edu/managers

At the top of the page go to:

Reqs—Smart Approval

On the APPROVALS tab, locate your Active Workflows. If there is something pending, it will be listed in the "For User" box.

Click GO and all the tasks will appear.

THESE ARE FAKE SCREEN SHOTS FROM THE STAGING SYSTEM…they are not real in process requisitions.

List of tasks that you are part of will appear—if they are waiting on you, the status will be "WAITING ON USER"

Either approve from that screen by selecting the req and clicking approve at the bottom, or click on each BR number to view details and approve using the regular smart approval box.

Viewing Reqs Pending Approval for your Own Reqs (you are the manager, creator or on the team)

Users on the req team will see all reqs pending approval for which they are a Hiring Manager, Requisition Creator or on the Req Team. If they are an approver of the requisition, they will see a checkmark in the APPROVE column.

Features on the Smart Approval Screen

If an approver entered comments, there will be a note that says "comments" and the comments will be on the comments tab. *Comments will also show any ad hoc approvers added to the approval workflow.*

Approver that YOU or someone else inserted during the approval process

Original Next approver

"Printer Friendly version" icon

Box for approval comments (visible to entire requisition team)

Printer Friendly Version:

SmartApproval - Print | | | Page ▾ Safety ▾ Tools ▾ ? ▾

Instructional Faculty - 561BR

Approvals

Role	User Name	Status	Delivered On	Note
Inserted Approver	Williams, Gina (HRIS Manager-Human Resources)	NA	7/30/2012	[Inserted by Trainerlead1, Zdemo (Trainerlead1)]
Dean or VP	Maggelakis, Sophia (Dean College of Science-COS Dean's Offic)	NA		
HRSM5	Gouger, Tamara (HR Services Manager-Human Resources)	NA		
Provost Budget Officer	Mastrangelo, Jennifer (SSO ACCT) (Director of Financial Operations-Academi)	NA		
Budget Officer	Monaco, Christine (SSO) (Assistant Budget Director-VP Finance)	NA		
Provost	Haefner, Jeremy (Provost-Office of the Provost & Sr VP fo)	NA		
Faculty Recruiter	Bontadelli, Charity (Faculty Recruitment Specialist-The Walla)	NA		

Details

Job Code (Position Combination)	006280-00-0U Instructional Faculty
Position Title	Instructional Faculty
Detailed Job Description	we would like a teacher to provide great education
Organization	COS School of Mathematical Sciences
Requisition Creator	Bontadelli,Charity (Faculty Recruitment Specialist-The Walla)
Hiring Manager	Houtman,Anne (Department Head-COS School of Life Scien)
Location/Division	
Number of Openings	1
FLSA Category	Exempt
Requisition Type (Select "Addition" if this is an	Replacement

Once you approve or decline the requisition, you will receive this message on your screen:

Approvals | My Profile | Admin | ?
Active Workflows | Final Status | Welcome: Williams, GinaHH | Logout

Thank you. Your actions have been successfully recorded.

As requisitions are approved, you can see the word **APPROVED** in the status:

Status	Type	Req ID	Job Name	Hiring Manager	funding_type	hrsm	approval_group	Date	Alt For
In Process	Standard Faculty Req	541BR	Instructional Faculty	Houtman,Anne (Department Head-COS School of Life Scien)	00			started 2012-07-19 02:26 received 2012-07-19 02:26	

Progress | Conversions | Comments

Role	User Name	Status	Delivered On
Dean or VP	Maggelakis, Sophia (Dean College of Science-COS Dean's Offic)	APPROVED comment	7/19/2012
HRSM5	Gouger, Tamara (HR Services Manager-Human Resources)	NA	7/30/2012
Provost Budget Officer	Mastrangelo, Jennifer (SSO ACCT) (Director of Financial Operations-Academi)	NA	
Budget Officer	Monaco, Christine (SSO) (Assistant Budget Director-VP Finance)	NA	
Provost	Haefner, Jeremy (Provost-Office of the	NA	

Instructional Faculty << >>

Job Code (Position Combination)	002057-01-00 Instructional Faculty
Position Title	Instructional Faculty
Detailed Job Description	Professor of Finance
Organization	Saunders COB Management & Marketing
Requisition Creator	Bontadelli,Charity (Faculty Recruitment Specialist-The Walla)
Hiring Manager	Houtman,Anne (Department Head-COS School of Life Scien)
Location/Division	
Number of Openings	1
FLSA Category	Exempt
Requisition Type (Select "Addition" if this is an incremental position.)	Replacement
Requisition Notes	
Position Control	002057

Note: Time zone supported is EST

How to Get Back to the Smart Approval Box

Locate the requisition in the My Reqs Pending Approval panel and click on the requisition number
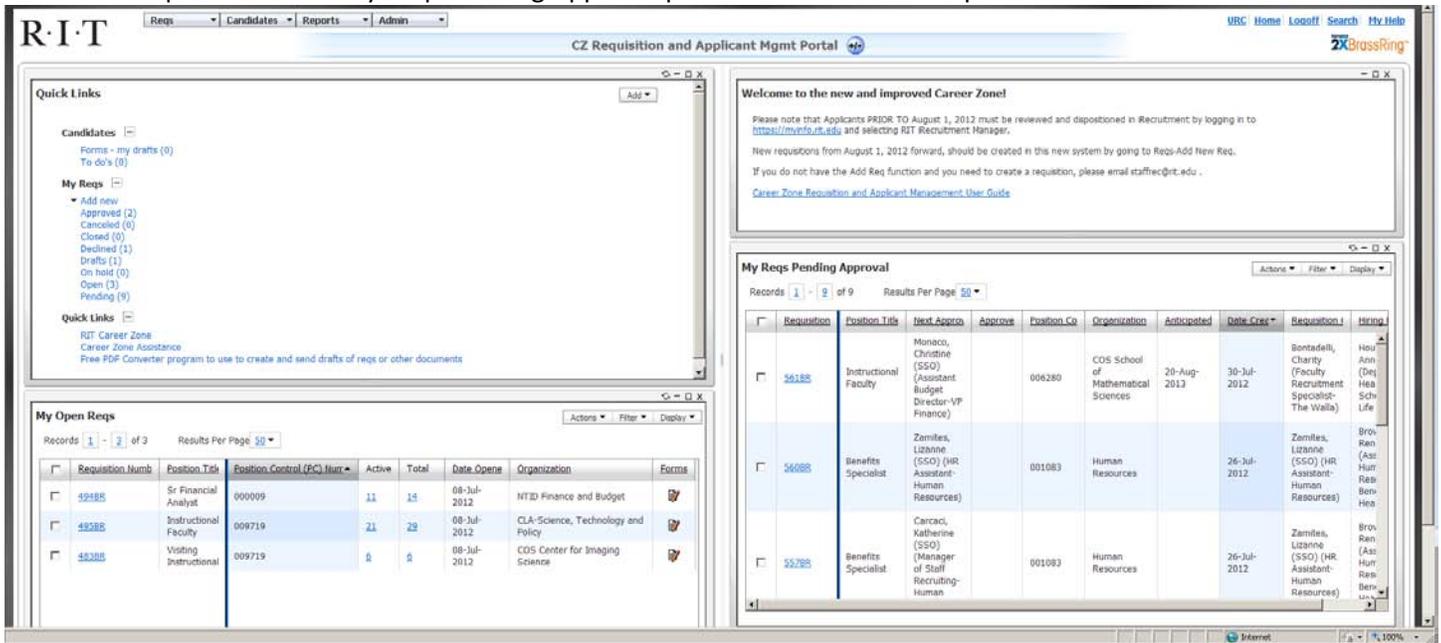
The requisition will then appear and a "VIEW APPROVALS" box will be at the top of the screen. The smart approval box will appear.

How to View Approval Workflows that you are part of

After you click on the View Approvals Box on your requisition screen, Click on the APPROVALS tab at the top of the smart approval view
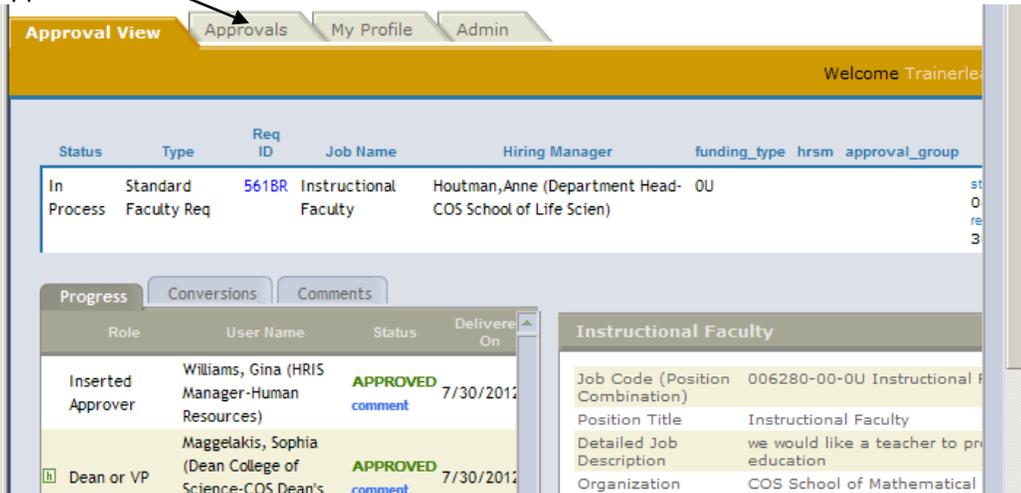
If you go to your APPROVALS tab, you can **view any workflows that you are a part of**. If you are the NEXT approver, you will appear in the "Waiting For" column.
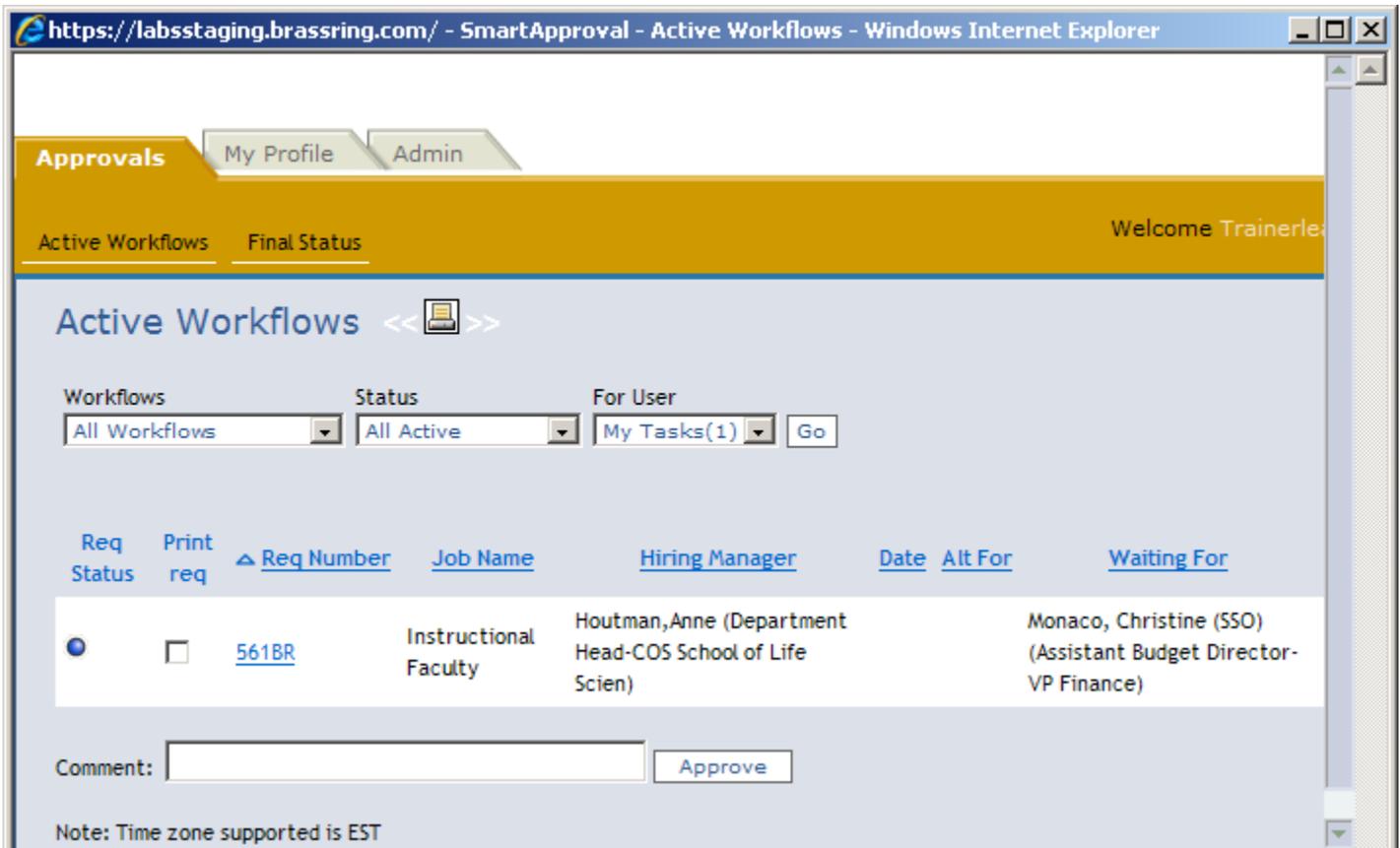
If it is your turn to approve, you can approve right from this screen by selecting the requisition and clicking the approve button at the bottom.

Changing your Own Approval Notification Settings

By going to your "My Profile" tab, you can change some of your settings. If you prefer NOT to receive elink notifications for approvals, you can turn it off.

If you prefer not to receive notifications of any approval activity, you can turn it off and select to just receive notifications when you need to approve.
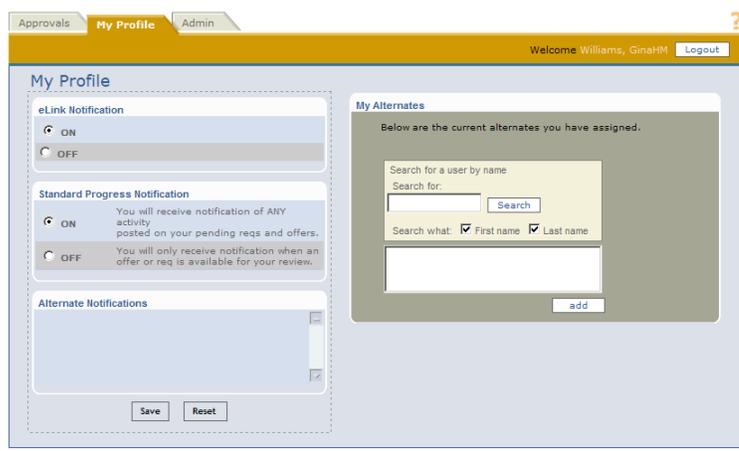
Vacation Rules for Requisitions

Vacation Rules for Requisition Approvals can be set through the Smart Approval window. **The functionality is called "Setting Alternate Approvers". Vacation rules in Oracle do not impact vacation rules in Career Zone (Kenexa 2XBrassring).**

How to set an "Alternate" for SmartApproval (similar to a Vacation Rule in Oracle)

1. Person logs into Career Zone and navigates to Reqs > Smart Approval.
2. Select the My Profile tab and on the right is a Box called My Alternates.
3. Enter the last name of the person who should be the alternate and hit search.
4. Select the desired person and click on Add.   Then click SAVE.
5. Please Note the two items below:
   1. If the person who sets up an Alternate does not want to receive any notifications and justs wants the Alternate to get the emails, they need to set the option eLink Notification to OFF. If they leave it as ON, both the original approver and the Alternate will receive an email and either can approve.
   2. In order for the Alternate to receive an email, under their Profile, they need to check the box for Receive Notifications under Alternate Notifications for the person they want to approve on behalf of. If they do not check this box they will need to manually go into Smart Approval through 2xB and query up the approval.
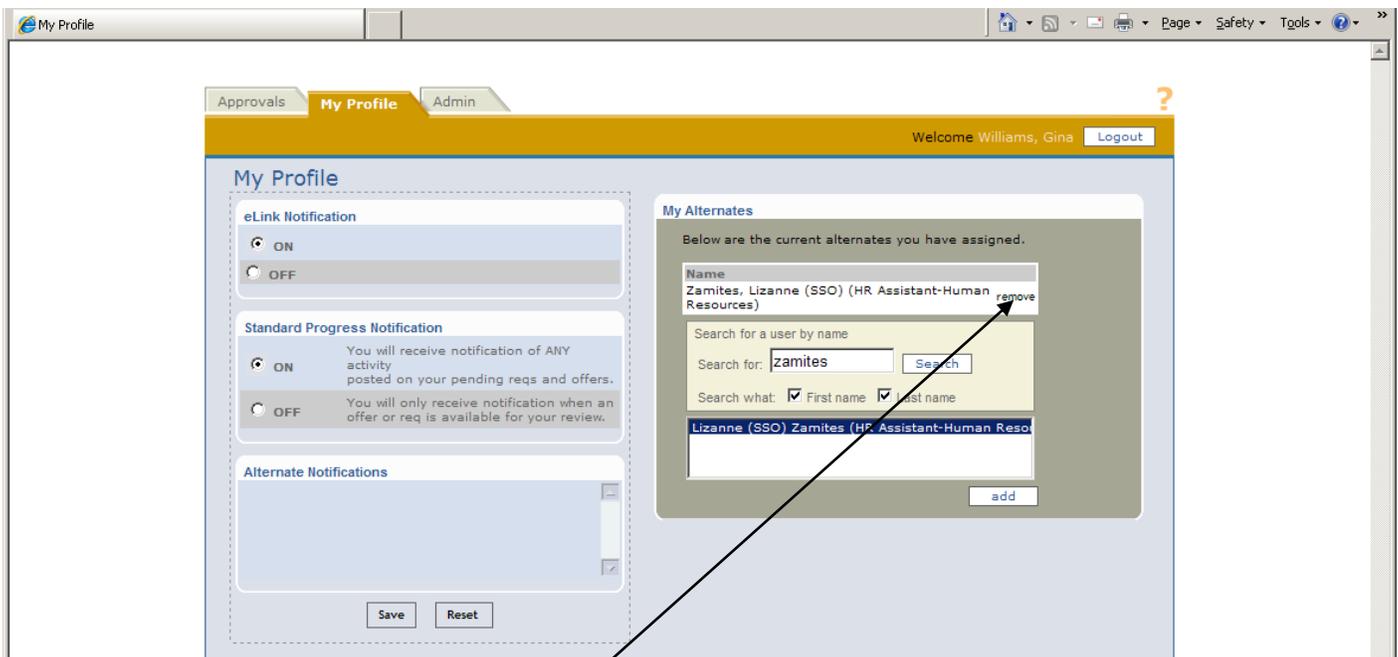
How to Turn Off Your Alternate Approver For Smart Approval (similar to a Vacation Rule in Oracle)

1. When you no longer wish to have your alternate approving your requisitions, click the REMOVE button next to their name in gray and white Name box.
2. Click SAVE.

Candidate Form Approvals-Online Process

NOTE: HRSM's will most likely not be in the approval process for any online forms at go-live. This is more of an FYI.

Online NEW HIRE EAF: When a hiring manager is ready to complete the New Hire EAF, they change the applicant status to either: **50-Prepare Transfer/Hire or 50-Prepare Transfer/Hire (Provost Division Only)**

1. If they are in non-Academic Affairs Divisions, they should complete the regular Staff New Hire EAF which should pop-up.

2. If they are in a College or the Provost/Academic Affairs Division, they should complete the Provost Div Staff new Hire EAF or the Faculty New Hire EAF which should pop up.

(If the correct form does NOT pop up, you can click on the FORMS icon in the candidate results grid or go to ACTIONS-Add Form).

3. **They will Route for approval based upon the requirements of the university and their business unit. Form creators have the flexibility to add their own approvers; there are NO auto populated approver names.**
   a. **There should be at least TWO departmental approvers on the EAF. If the appropriate approvers are not selected the form should be declined so the correct individuals are added in the approval chain.**
4. Each approver will receive an email notification that they need to approve. They can enter approval mode by clicking on the hyperlinked name in the email.
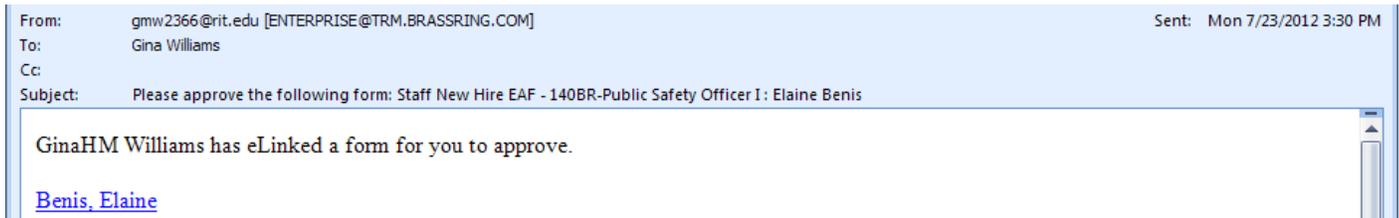
5. Once the form is fully approved, the role or person indicated to be notified upon approval will receive an email.

6. If you would like to view where in the approval process your form is, you can refresh your forms page and click on the VIEW FORM icon and scroll to the bottom of the form.

    If anyone in the approval chain is holding up the approval process, you may contact them or their designate. If they are on vacation, an email from them or someone acting on their behalf must contact Human Resources about bypassing their approval and approving the form on their behalf. <u>Whoever approves the form on their behalf will show as the approver on the form.</u>
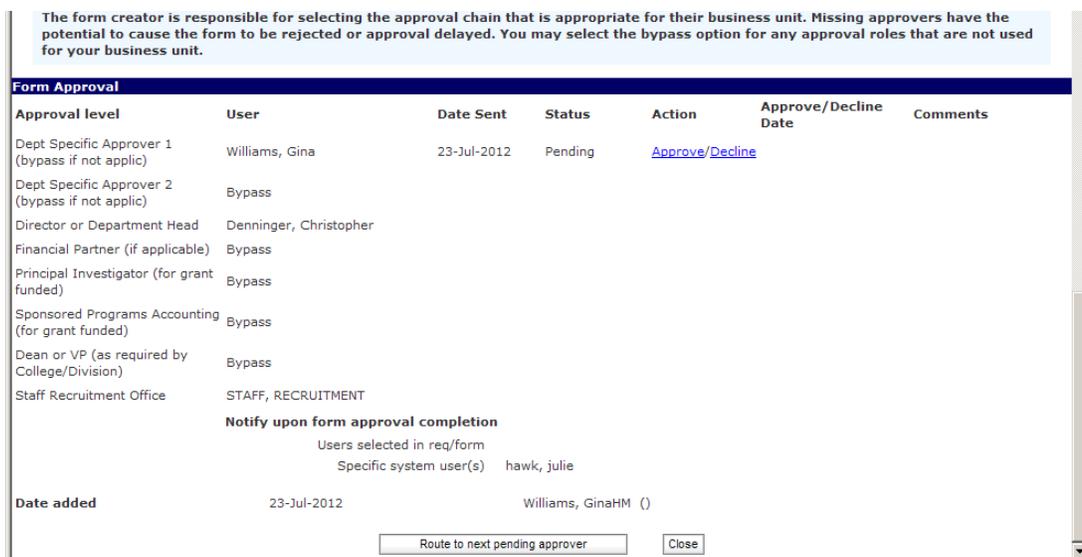
7. Upon approval, Staff or Faculty recruitment will process the EAF, contract letters and other new hire paperwork to be forwarded to Human Resource. Human Resources will then enter the data from the EAF into the Oracle system to process the hire. This form is not currently integrated with Oracle, so please allow time for the form to be manually processed in the Oracle HR system.

Vacation Rules for Candidate FORMS

IMPORTANT: There is currently no Alternate Approver or "Vacation Rule" functionality available for Candidate forms. If you will be unavailable to approve candidate forms for a period of time, <u>please send an email to the Faculty or Staff Recruitment Offices at staffrec@rit.edu or Staff Related Forms and OFRR@rit.edu for Faculty Related Forms </u>to let them know who will be able to approve forms on your behalf if someone contacts them for a needed form approval.

We are working with Kenexa 2X BrassRing for a solution around form alternate approvers and will update these procedures as soon as a solution is obtained.