**Overview**

There are 3 steps to the electronic appointment process:

Step 1: Determine if a position on the Position Inventory that can be used. If there is a position to use, continue to Step 2. If there is not a position that can be used, request a new position. **(New Position Request)** Continue with Step 2 after the position has been created and is on the Position Inventory.

Step 2: Assign salary dollars to the position and request to start a search process. **(Search Request)**.

Step 3: Appoint an individual to the position. **(Appoint Request)**

The **Position Inventory** is the starting point for the electronic appointment process. It provides a link to the modules to complete Step 2 - Search Requests and Step 3 - Appoint Requests. It includes information on the status of requests that are in process or that have been approved, as well as links to information about the position and a history of electronic appointment process actions.

The **Power Grid** provides the user with details on the approval process for each type of request. It also includes a link to the appropriate module when it is the user’s turn to take action.

**Position Inventory**

The first step to the process is to determine if there is a position available to use. From the Position Inventory link:

Select Department, College or Subdivision, or Division (if available).

Select type of position: Classified

 Unclassified

 Graduate Assistant

 Student

 View All

The user will see the Position Inventory based on these choices.

Each column can be sorted as needed by placing the cursor over the column name and left-clicking on the mouse button.

The user can create an excel spreadsheet from the Position Inventory by clicking on the “Download to Excel File” link in the upper left corner.

The types of positions viewed on the Position Inventory can be narrowed by clicking on the “View Unclassified (or Classified or Graduate Assistant) Type” links at the top of the Position Inventory.

Note: There is also a Position Description menu item on the GUS menu.

The Position Inventory is divided into sections:

1) The “**Position Inventory**” section provides basic information to help the user select the appropriate position and view a history of completed electronic appointment process actions.

2) The “**Search**” section provides information to start a Search Request and track it as it works through the electronic appointment process. Click on the position’s ‘View” link to access the Search Request module.

3) The “**Appoint/Fill**” section provides information to start an Appoint Request and track it as it works through the approval process. Click on the position’s “View” link to access the Appoint Request module. **Note that there will not be a “View” link in the Appoint/Fill” column until the Search Request started in Step 2 has been approved by everyone.**

4) The “**Active Info**” section provides the names of the active employee and the previous employee on this position.

Additional information about the position is accessible by clicking on the “Position Number Link” in the “**Position Number**” column. In addition to basic information about the position, users will see the Tracking Number links for New Position Requests, Search Requests and Appoint Requests that have been approved, disapproved or cancelled. The user can also click on “View Attachments” at the top of the page and see documents that have been attached to the position, including the Position Description.

When possible, the user should select a position from the Position Inventory list that matches the majority of the criteria. Some data, such as funding, can be changed in the modules. Other data cannot be changed. Users can call Budget at ext. 4105 for help in selecting a position from the Position Inventory.

If there is a position on the Position Inventory that can be used, the user starts Step 2 - Search Request by clicking on the position’s “View” link in the “Search” column. When the Search Request has been approved by all, a “View” link in the “Appoint/Fill” column will appear. The user clicks on this “View” link to start Step 3 - Appoint Request.

If there is not a position on the Position Inventory that can be used, the user will start Step 1 - New Position Request from the “New Position Request” link. When the New Position Request has been approved by all, the Budget office will set up a position in the HRS IBM database. The user will get an email with the position number to use in Step 2 – Search Request. The position number will appear on the department’s Position Inventory, and the user will proceed with Step 2 - Search Request from the Position Inventory.

After a Search Request or Appoint Request has been started, the “Status” column on the Position Inventory will display one of the following:

 IP – In Progress

 A – Approved

The electronic appointment process for a Step 2 – Search Request and a Step 3 – Appoint Request is completed when the “Status” column is “A – Approved.”

**Power Grid**

The Power Grid tracks each request through the approvals of the electronic appointment process. Users can see at a glance who has approved a request and who needs to act. If it is the users turn to act, an “Action” button is displayed on the Power Grid. The button will take the user to the appropriate request module. The Power Grid is separated into 3 sections – one section for each step.

Users can limit the types of request modules displayed on the Power Grid by clicking on the “View Classified,” “View Unclassified,” or “View Graduate Assistants” links at the top of the Power Grid.

The system assigns a Tracking Number to each request module. The Tracking Number is displayed on the Power Grid and also on each request module. The user clicks on the Tracking Number on the Power Grid to view the request module.

When Step 1 - New Position Requests or Step 2 - Search Requests are completed, the line tracking the request on the Power Grid will be removed from the Power Grid. Users will use the Position Inventory to start the next step in the electronic appointment process.

When Step 3 - Appoint Requests are completed, they will remain on the Power Grid until HRS appoints the individual in IBM.

If a Search Request or Appoint Request is cancelled or disapproved, it will immediately be removed from the Power Grid. Users view cancelled and disapproved requests from the “Disapproved/Cancel List” link on the top of the Power Grid.

**Grey Header on the Request Modules**

At the top of each module is a grey header. The header contains the information from the IBM Position File for the position. The information will assist the user and approvers to complete the electronic appointment process.

The following information is listed for the position on each module:

* + Position Number
	+ Position Type - Unclassified, Classified or Graduate Assistant
	+ Department
	+ Pay Method - Bi-weekly or Hourly
	+ Appointment Type - CT, CN, CA or TM
	+ Teaching Flag – Yes or No
	+ Eligible for Benefits - Yes or No
	+ Included in Annual Operating Budget (AOB) – Yes or No
	+ Tenure Earning – Yes or No
	+ Incumbent or Previous Employee Name
	+ Criminal Background Check Required – Yes, No or To Be Determined (TBD)
	+ Credit Check Required – Yes or No

Note that this information pulls from the IBM Position File, and information cannot be changed in the IBM Position File until the position is vacant. The hiring department may change some of the information in a Search Request or Appoint Request (i.e. Tenure Earning), but the information displayed in the grey header box may not be changed until a later date.

**Actions Common to All Steps**

Each step in the electronic appointment process involves working from a module. The module is an electronic form that will walk the user through completion. In completing the module, the user will use the drop down boxes to make selection and enter text as appropriate for the type of action.

The Search Request module and Appoint Request module have two sides. The left side of each module is for default information. In the Search Request, the default information is pulled either from the New Position Request and/or the IBM Position File. In the Appoint Request, the default information is pulled from the preceding Search Request. The right side of each module is where the user selects options and enters text.

Users should not start the module until it is ready to be submitted as it cannot be saved to finish later.

There are FAQ’s for most of the fields in each module to help the user with completing the request. To view the FAQ, click on the FAQ icon (blue circle with a ?).

Once a user submits a module, he/she can change data in the module **until** the module has been acted on by the next approver. If data on the module needs to change after this, the user can request that someone higher in the approval chain make the change. The user can also cancel the request and start again.

Generally, the Chair or Authorized Signature will start Step 2 - Search Requests or Step 3 - Appoint Requests. If a request is started by the Dean, it will cycle back to the Authorized Signature and Chair for approval. If the request is started by the Provost/Vice-President, it will cycle back to the Authorized Signature for approval but will not go through the Chair or Dean.

Users use the “Tab” to go from one text box in the request to the next.

If a Search Request or Appoint Request has split funding, the user enters fund, unit, and salary, then hits “tab.” A second set of funding boxes will appear. The user will need to use the mouse to set the cursor in the second set of funding boxes.

After the user has completed all required fields in a request module, he/she clicks on the “Submit” button at the bottom of the module. The system will display the module again after it is submitted. If there are Errors in the request, the user will see the Error icon (yellow triangle with an “!” in the middle) and a list of the errors. The Errors must be corrected and the request resubmitted. **The user should also review any Alerts displayed at the top of the module.** The Alert icon looks like a pad of paper with a pencil.

When the request has been successfully submitted, the user will see the approval box at the bottom of the module. The approval box will show that the user has initiated the request and that it is ready for action by the next approver.

Each approver should review the module data before taking action (e.g. Approve, Hold or Disapprove). If an approver puts an action on Hold, he/she should explain why in the Comments box. If the approver changes some of the data in the module, he/she must click on the “Submit” button to submit the changes. Then, the approver must click on the
“Action” button to complete the process.

The Power Grid and Position Inventory will be updated to reflect the actions of the user and each approver as the request module goes through the electronic appointment process.

Users will receive email messages and messages in their message hut regarding actions as they progress through the approvals a. The messages are intended to be a prompt that there is a need to go to the Power Grid.

The following can cancel a Request (via a “Cancel” button on the module) at any time as the Request works through the approval process:

* Initiator
* Authorized Signature
* Chair of Department
* Contact Person of the Department
* Graduate Office Dean (Graduate Assistant Positions only)