

# EX Human Resources Payroll & Personnel

LEARNING GUIDE



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## Chapter 1. INTRODUCING THE LEARNING GUIDE

This guide is a source of information on the setup, configuration, and use of the Payroll and Personnel modules as well as Timecards and Applicant Tracking features within the JICS CRM Staff portlet.

Within this guide, you may find one or more of the following graphics and formats to identify a particular fact, aspect, or detail:



A Note will be used to identify specific information related to the text preceding it and will be recognized by this type of format and icon.



A Hint will be used to point out a suggestion or recommendation that will assist you with the task or function preceding it, and will be recognized by this format and icon.



A Warning will be used to alert you to the consequences of a specific process, step, or its results and will be recognized by this type of format and icon.

### Example



An Example will show you the steps of a process recently discussed or how you could put the recent information into practice, and will be recognized by this type of format and icon.

### Case Study



Case Study will describe a recently discussed topic in detail to show how the principle can be applied to your situation.

In this document, you may see windows or features that you cannot access from your own system. Please note that what you see in your EX database will depend on your permission settings. If you do not see a window or feature that you need, contact your system administrator.

If you have questions about the setup and configuration of the tables, log into [MyJenzabar.net](http://MyJenzabar.net), go to Support → EX → Module Resource Center, and choose the module you need to configure. The Configuration Guides are updated for each release and maintained by the Services group. If you need information about a specific field on a window, open the window in EX and then press F1 for the Help Documentation.



## Chapter 2. EXPLAINING THE GUIDE

This chapter will provide an overview of the topics that will be addressed during the length of the course.

### AGENDA

- Maintaining Tables
- Working with Employees
- Processing Payroll
  - Payroll Controls
  - Timecards (CRM Staff)
  - Generate Check Batches
  - Print Checks/Transfer Direct Deposits
  - Update Payroll
- Using Applicant Tracking
  - Position Requests
  - Hiring Officers
  - Creating Positions
  - Application Process
  - Processing Applicants
  - Hiring an Employee
- Running Reports
  - Payroll Reports
  - Personnel Reports
  - Applicant Tracking Reports

### OBJECTIVES

At the end of this guide, you will be able to:

- Work in the Payroll and Personnel tables
- Manage and maintain employee records
- Process payroll
- Utilize Timecards and Applicant Tracking
- Hire a new employee
- Run Human Resources Reports



## SUMMARY

Human Resources (HR) is comprised of the Jenzabar EX Payroll and Personnel products. This Learning Guide will give you an overview of the processes that take place in the Human Resources within Jenzabar EX, and you will learn which tables need maintained, step-by-step processes for working in the Payroll/Personnel, and learn how to complete the day-to-day tasks.

In addition to HR modules, this guide will cover the setup and use of the JICS CRM Staff portlet that will allow you to use Timecards and Applicant Tracking on the JICS web portal.

## Overview

Human Resources is the result of combining Personnel and Payroll with the features in CRM Staff.

### Personnel

In the Personnel product, you will work with employee records to ensure that all information and details of the individual are correctly entered into your system.

### Payroll

Within Payroll, you will work with windows and reports to use timecards, manage benefits, process payroll, issue checks or direct deposits, and update payroll to ensure that all employees receive their money on time.

### CRM Staff

There are two main features in CRM Staff that affect HR. Applicant Tracking and Timecards. The Applicant Tracking process will allow you to track positions and applications from the moment a position is requested all the way through the hiring of your chosen applicant. The Timecard feature will allow your employees to enter their work time and allow a supervisor approve the time.

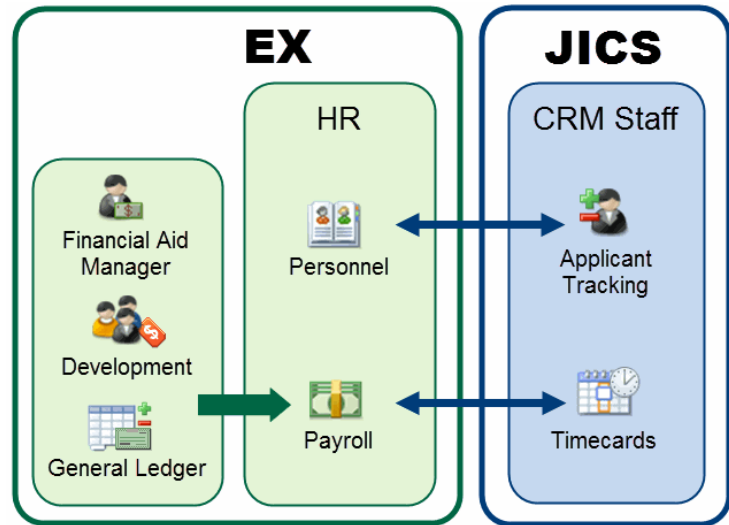
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## Working Together

The Human Resources module is integrated with many other modules across the EX and JICS systems. Payroll and Personnel are closely tied together through employee records and many common windows. Payroll also works with General Ledger, Financial Aid Manager, and Development within the EX system to relate financial information and account numbers. The CRM Staff portlet within JICS helps to make the HR processes as easy and seamless as possible. Allowing your employees 24x7 self-service access, this web-based data management system delivers timely and accurate data to your staff (when they need it), and provides a user-friendly environment for many Human Resources tasks.



When you are using CRM Staff with Personnel, you can use the Applicant Tracking feature that will allow you to follow the application process from internal and external influences. When using CRM Staff with Payroll, you can utilize the Timecards function that will make it easier for employees to enter their hours, and for supervisors to review and approve the timecards of their staff.



## Chapter 3. MAINTAINING TABLES

Most of your tables should already be configured for you; however, you will need to continually maintain several tables within the HR modules to ensure the content is correct. Because the Human Resources modules deal with personal and financial information, it is important that the data and tables be maintained properly.

### OBJECTIVES

At the end of this chapter, you will be able to:

- Create Payroll groups
- Apply security to groups
- Edit, create, or delete benefit codes
- Set accrual standards
- Organize jobs, positions, and supervisors
- Check annual tax codes

### CONFIGURATION

When working with Human Resources, there are three main configuration windows you will need to use: **Configure Human Resources** via Payroll or Personnel, **Configure Personnel**, and **Configure Payroll**.

#### Configure Human Resources via Payroll/Personnel

This window is separated into four sections, and is available in both the Payroll and Personnel modules.

The first section, **Modules Existing on the System**, is an informational section that will let you know what additional EX modules your school is using that can interact with HR.

**Fiscal Period** allows you to identify your current fiscal year and month. For most schools, this date may be the date you converted over to the Jenzabar EX system; however, this month and year will need to be updated if you use the *W2 Member Investment Plan* benefit.

The **Calculate Accruals from Payroll Module** checkbox controls how the accrual benefits are processed during a pay run. There are two ways to calculate the accruals; you can process them through payroll or through accrual batch process. If you want the accrual information for each individual to calculate during the payroll run, select this checkbox. You will want to turn this option off if you are running accruals manually, or if you are submitting bonuses or other additional pay.



*If you do not have the Payroll module, make sure this checkbox is cleared.*



The **General** section of this window has two options that will affect your Human Resources modules. From this section, you can define file extensions and configure the notification messages. File attachments can be added during several processes to provide additional information, and you need to determine what type of file extensions users can upload (for example, .doc, .docx, .xls, .xlsx, .pdf, etc.). You may also want to configure the notification messages users will receive to keep groups and individuals informed about specific details and processes within Applicant Tracking.

## Configure Personnel

From the **Configure Personnel** window, you will define your accrual benefit codes that can be used throughout the Personnel module. The benefits that can be defined in HR include, Vacation, Sick, Holiday, and Other times that will accumulated at a certain rate or amount per hours worked.

Configure Personnel	
Accrual Vacation Code:	VAC Vacation
Accrual Sick Code:	SICK Sick Leave
Accrual Holiday Code:	HLDY Holiday Pay
Accrual Other Code:	OTHER Other Time



You cannot define more than four default accrual benefit codes, and these must already be entered on the Benefits Control table.

## Configure Payroll

From this configuration window, you will define tax periods, check layout, hours, and timecard details. The **Configure Payroll** window mainly deals with accruals and timecard entry, and has many settings that will determine how your timecards work.

The **Validate Hours** section will be important because the option you choose here will determine how your timecards check the entered data:

- **Error:** if your timecard totals do not match, an error message will appear and the system will not allow you to leave the Timecard Entry window until your totals are fixed and match
- **Warning:** if your timecard totals do not match, this option will give you a warning message to let you know, but will still allow you to exit the Timecard Entry window assuming you will return to correct the information before continuing to process payroll
- **No Check:** this option will not check any of your totals for validity and assumes that all of your data is correct



**Configure Payroll**

Timecard  
Vacation Code: VAC Vacation Sick Code: SICK Sick Leave  
Holiday Code: HLDY Holiday Pay Other Code: OTHER Other Tim  
Entry Type  
☒ Long ☐ Short  
Validate Hours  
☐ Error ☒ Warning ☐ No Check  
☒ Display Overtime in CRM Staff ☒ Create Pay Statement Images?  
Object Code Account Component: 4 Check Accrual Information  
Number of Tax Periods: 26.00 ☐ Remove Timecard Batch  
Display Payrate: Both ☒ Check Messages  
☒ Use SQL based Checks and Direct Deposits ☐ Summarize GL LB Transactions  
☒ Suppress Salary Hours on Stub ☐ Summarize GL IV Transactions  
Check Earning Details  
☒ By Earnings Position ☐ By Earnings Type  
☐ Require Vendor and Subsidiary code for Invoices ? Work Hours in Week: 40.00  
Stub Description  
Regular Earnings: Regular Overtime Earnings: Overtime  
Other Earnings: Other

The **Display Overtime in CRM Staff** and **Create Pay Statement Images?** checkboxes determine whether employees can enter their own overtime hours and view their paychecks within the CRM Staff web application.

This window, also allows you to make several other decisions on how your Timecard Entry will work for your employees and for your Payroll department.



If you will be using the CRM Staff Timecard feature, this window will need to be setup prior to using the Payroll module.

## GROUP CONTROL WITH PAYROLL DETAIL

This window will allow you to group employees for payroll. You can have as many or as few groups as you need, and add new groups or subgroups as necessary. You can also assign security permissions to each group.



These groups are important for organizing your payroll, especially if you allow employees to enter their hours on the CRM Staff portlet.

**Group Control with Payroll Detail**

General Payroll

Group	Subgroup	Group Description
EMPL	*	All Employees
FAC	FT	Full Time Faculty
FAC	PT	Part Time Faculty
FAC	ADJ	Adjunct Faculty
HRLY	*	Hourly
INT	*	Interns
MON	*	Monthly
SALRY	*	Salary Staff
SEA	*	Seasonal Workers
SUPP	*	Supplemental
TEMP	*	Temp Workers
WKST	*	Work Study
WORK	*	Workstudy - Federal



*The General tab contains the same information as the Group Control window (PE)*



Depending on how your Human Resources department wants to organize the groups, you can have very detailed groupings or more simplistic groupings. For example, a more simplistic approach may include only full- and part-time employees. A more detailed approach may first break employees up into Administrative, Staff, and Faculty, then further into full- and part-time. There may also be additional positions that fall under Administrative or Staff employees such as Temporary workers and Interns; and in the case of Faculty, may include Adjuncts.

Group Control with Payroll Detail

General Payroll

Group: FAC  
Subgroup: FT  
Description: Full Time Faculty

Check Date: 00/00/0000  
Period Dates: Begin: 00/00/0000 End: 00/00/0000

Gross Pay: 1-0000-1360-0  
Net Pay: 1-0000-0116-0  
Accrued:

Account Number Description  
Fac Gross Pay  
Faculty Cash

Check Messages  
Message 1: Faculty Message  
Message 2: Group Message  
Message 3:

Every group will have additional information on the **Payroll** tab of the window.

From the **Payroll** tab, you can start associating GL account numbers to the specific group.

From this window, you can also edit the check date, period dates, add account numbers, and write messages that will appear on the check.



The check and period dates are informational only and do not affect the system.

Once you have made your selections, save your work and you can go back to the **General** tab to edit more groups or exit the window.

## Applying Security

Once you have identified your groups and subgroups, you can add security by going to the **HR Group Security via Payroll** window.

For example, if you have work-study students in the office, but only want to allow them to see other students, you could apply security that would block them from employees and still allow them to see other students.

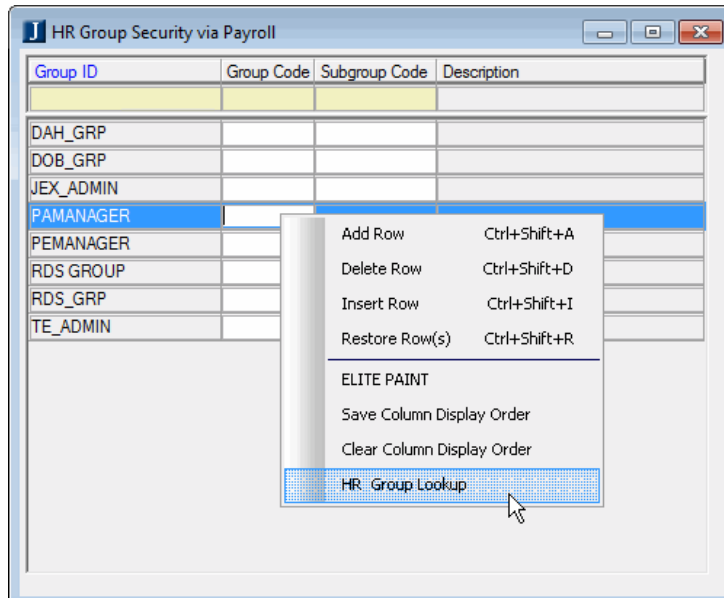
Group ID	Group Code	Subgroup Code	Description
DAH_GRP			
DOB_GRP			
JEX_ADMIN			
PAMANAGER			
PEMANAGER			
RDS GROUP			
RDS_GRP			
TE_ADMIN			

Security works by locking the tabs on the **HR Employee Master via Payroll** window for specific groups you wish to limit access. Without security, anyone with access to the HR Employee Master window could see the personal and financial information for all employees.

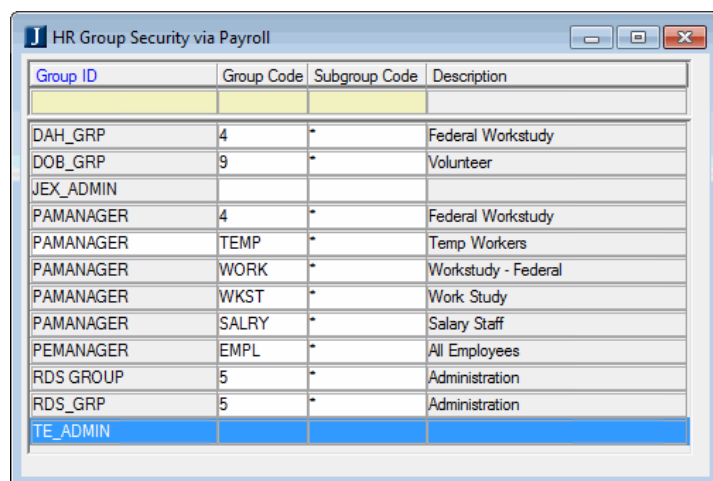
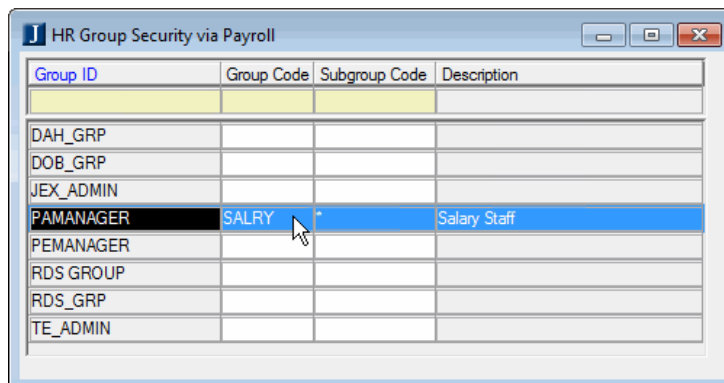


To apply security, right-click on the Group ID you wish to apply and then select **HR Group Lookup** to open the **HR Group Select** window.

You can choose which group you want to secure. Click **OK** once you have selected the **HR Group**.



You will see your selection appear in the Group Code column. Now, when an individual tries to open an employee file they do not have the correct permissions for, they will receive an error stating they do not have access.



If you have a group that needs access to two or more group codes, you can simply add the Group ID multiple times on the **HR Group Security via Payroll** window.



If you want a Group ID to have access to everything, leave the Group Code blank.



If you are a member of more than one group, your permissions will be determined by the group you use to sign into EX.



## BENEFIT CONTROL WITH PAYROLL DETAIL

All benefits have a code and description, and from this window, you can control the details of the benefit codes. Benefits will include deductions, fringes, and other earnings (accruals) such as health care, 401K, and dependent care.

On the **Benefits Control** window, you can add, edit, or view your current benefit codes. To add a new benefit, right-click and select **Add Row**. If you need to view or edit an existing benefit you can right-click and select **Benefit Code**.

In the **Employee** section, you will notice Deduction and Fringe rates and amounts. These fields may be empty if your employees have an option for the amount they want to contribute. If there is a flat amount that all employees would pay for a benefit, then you would enter the rate or amount in this section.

Towards the bottom of the window, you will notice a checkbox for **Auto-generate individual records**. If you check this box, the benefit code identified will automatically appear in the code options for every individual in your **HR Employee Master** window.



The system will automatically apply the code to all new individuals; it will not distinguish between employees and work-study students.



If an employee already exists, checking this checkbox will not add the benefit to their record. You will still have to manually add the benefit to your existing employees.

If you are working with Payroll, when you select a benefit code, you will notice that two additional tabs are available on the window.

The **Details** tab will allow you to enter additional information that is required to accurately account for benefits and taxes.

In the middle of the window, you will notice a checkbox for **Always Calculate Benefit Amount when Based on Amount is Zero**. If you check this box, the system will force the benefit to be calculated, regardless of what the benefit calculation is based on for the individual.





One way you could use this feature, for example, is to process your reimbursements through payroll instead of accounts payable. To do that, you would process the reimbursement as a negative deduction and select the ***Always Calculate Benefit Amount when Based on Amount is Zero*** checkbox so even if the employee's primary gross was zero, you could still generate a check to include the reimbursement.

The **Benefit Text** window is used in conjunction with the Employment Contracts functionality. Any text you enter here will appear on the *Employment Contract*, *Contract Audit Report*, and *Contract Error Report*.

While you can customize your text, there is a default statement setup to ensure the benefit description appears on the contract.



*If you need to delete an unused benefit, you can right-click to Delete.*



*You are also able to access the Benefits Control window from the Personnel module; however, when viewing the window through Personnel you will only be able to see information from the Header tab.*





## HR ACCRUAL STANDARDS VIA PAYROLL/PERSONNEL

This is the window where you will identify time off codes (vacation, sick time, personal, etc.) and define the regulations and policies about how your employees will accrue benefits.

The Accrual Class drop-down options can be maintained by right-clicking on the **Accrual Class** and selecting **Maintenance Screen**. From the **Maintain Table Values** window, you can adjust the codes according to different groups you need for your employees (half-time, part-time, full-time, etc.). You can setup the accrual rates and limits, and determine when and how the accrual happens. There is also an option to allow employees to have a negative available balance, but you will need to review your school's policies for time off before choosing an option.

To setup how your accruals will work, there are several radio button options you need to select:


- **Stop Accruing Time When:** determines if the system looks at the Available amount or the Accrued amount on the individual's record to determine if they can accrue more time
- **Accrued Time Available When:** decide if the accrued benefit hours are available for use as soon as they are accrued, or if they are added after the accruals are rolled over
- **Calculate Accrued Time When:** this option determines if the time taken is subtracted from the available amounts before or after the accrual run
- **Rollover Amounts When:** determine if you want to have rollover occur before or after accrual calculations are done

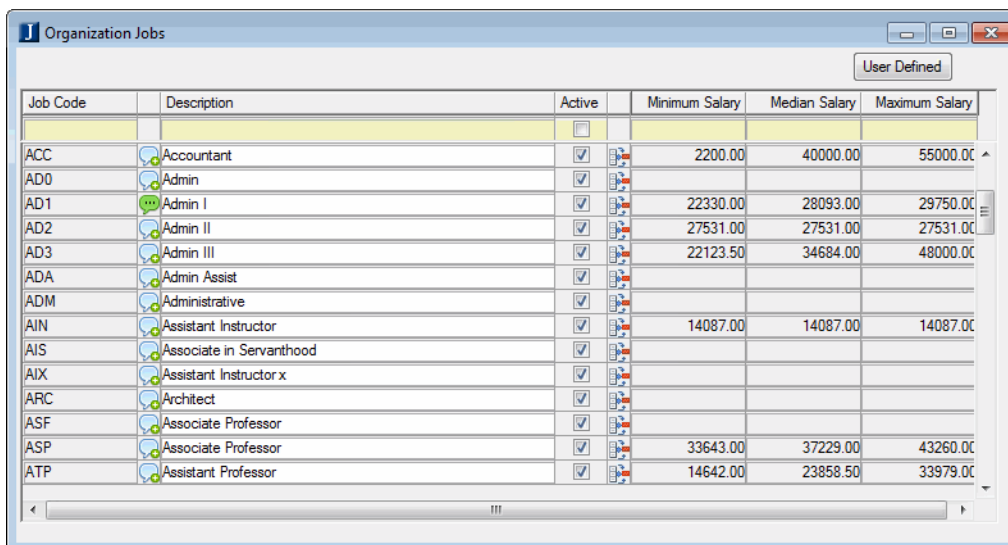
At the bottom of the window, there is a section for **Additional Rollover Information** that will determine how to handle rollover time. You can choose a specific date for the rollover to occur such as the new year (January 1) or you can leave the Month and Day fields blank, and the system will automatically use adjusted service date and if that field is blank then it will look at the employee's original hire date. In this section, you can also set a limit for the number of hours an individual can rollover. If you want to set a specific number of hours, such as 40.00, you can simply enter the amount. If you want to allow an unlimited number of hours, you would enter all 9's (99999999.99), or if you do not want to allow rollover, you can enter 00.00.

The **Use It or Lose It** checkbox will serve as a reminder to you that any accrued time not used by the end of the year will be lost and not carried over to the next year. While this can be a helpful reminder, the system will not subtract any benefit hours based on this checkbox.



## ORGANIZATION JOBS

In the **Organization Jobs** window, you will define categories for past, current, and future job positions at your school. You will create job codes that can be attached to positions for classification, add comments, assign job competencies (  ), and activate/inactivate the job codes.



The screenshot shows the 'Organization Jobs' window with a 'User Defined' button. The table below represents the data visible in the window:

Job Code	Description	Active	Minimum Salary	Median Salary	Maximum Salary
ACC	Accountant	<input checked="" type="checkbox"/>	2200.00	40000.00	55000.00
AD0	Admin	<input checked="" type="checkbox"/>			
AD1	Admin I	<input checked="" type="checkbox"/>	22330.00	28093.00	29750.00
AD2	Admin II	<input checked="" type="checkbox"/>	27531.00	27531.00	27531.00
AD3	Admin III	<input checked="" type="checkbox"/>	22123.50	34684.00	48000.00
ADA	Admin Assist	<input checked="" type="checkbox"/>			
ADM	Administrative	<input checked="" type="checkbox"/>			
AIN	Assistant Instructor	<input checked="" type="checkbox"/>	14087.00	14087.00	14087.00
AIS	Associate in Servanthood	<input checked="" type="checkbox"/>			
AIX	Assistant Instructor x	<input checked="" type="checkbox"/>			
ARC	Architect	<input checked="" type="checkbox"/>			
ASF	Associate Professor	<input checked="" type="checkbox"/>			
ASP	Associate Professor	<input checked="" type="checkbox"/>	33643.00	37229.00	43260.00
ATP	Assistant Professor	<input checked="" type="checkbox"/>	14642.00	23858.50	33979.00



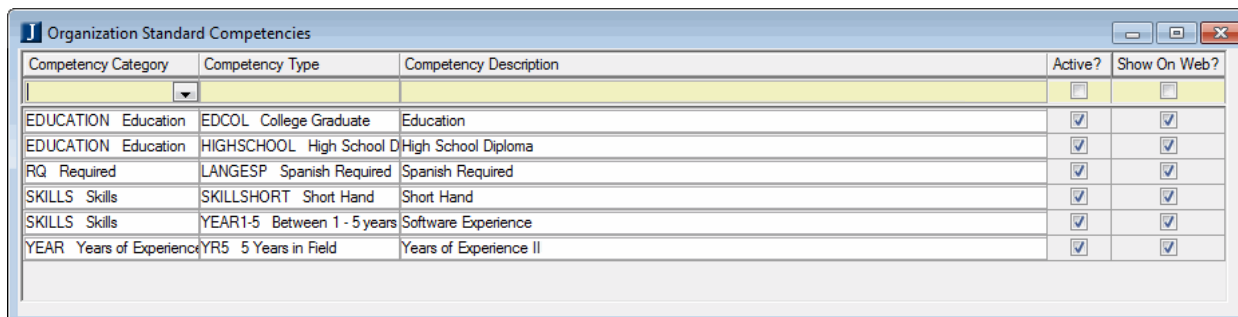
The minimum, median, and maximum salary amounts cannot be changed on this window. These amounts are pulled from employee positions attached to a job code.



*While the most obvious method of creating job codes is to use generic types (such as Admin or Instructor), you could also create the codes by department (such as English or IT Department). How you organize is up to your school, but there are many methods that can help with organization and reporting.*

## Organization Job Competencies

When defining organization positions, you can assign desired or required standard competencies for employees filling the position. You will need to setup your standard competencies on this window first before assigning them to specific job codes on the **Organization Jobs** window. If you want the codes to become active, you need to make sure the **Active?** checkbox is selected. If you want the competency to be available in CRM Staff, you need to select the **Show On Web?** checkbox.





The screenshot shows the 'Organization Standard Competencies' window. The table below represents the data visible in the window:

Competency Category	Competency Type	Competency Description	Active?	Show On Web?
			<input type="checkbox"/>	<input type="checkbox"/>
EDUCATION	Education	EDCOL College Graduate Education	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EDUCATION	Education	HIGH SCHOOL High School Diploma	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
RQ	Required	LANGESP Spanish Required Spanish Required	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SKILLS	Skills	SKILLSHORT Short Hand Short Hand	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SKILLS	Skills	YEAR1-5 Between 1 - 5 years Software Experience	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
YEAR	Years of Experience	YR5 5 Years in Field Years of Experience II	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



## ORGANIZATION POSITIONS

From this window, you will organize and maintain specific positions at your school. Further defining the Organization Jobs, in this window, you will create specific job titles and positions. In addition to the traditional classification, type, and status fields, this window will also allow you to attach departments or supervisors to positions.

On the bottom portion of the window, you will see several collapsible fields. You can expand these sections to add additional information for the position. If you look at the icons to the right of the sections, you will notice either a  or a  icon. These icons simply let you know if there is any information in the collapsible sections.

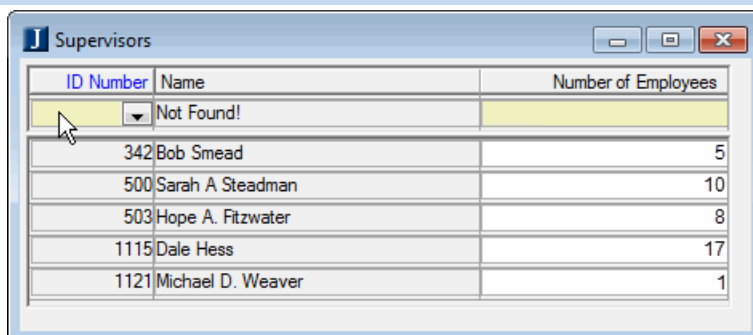


Each employee must be in an available/active position.



## SUPERVISORS

On each position, you can attach a supervisor. This table becomes very important if you are allowing your employees to enter their time on CRM Staff because the supervisor will need to approve their timesheets. If you are not using CRM Staff, assigning supervisors is optional, but can be a helpful feature for running reports.



ID Number	Name	Number of Employees
▼	Not Found!	
342	Bob Smead	5
500	Sarah A Steadman	10
503	Hope A. Fitzwater	8
1115	Dale Hess	17
1121	Michael D. Weaver	1

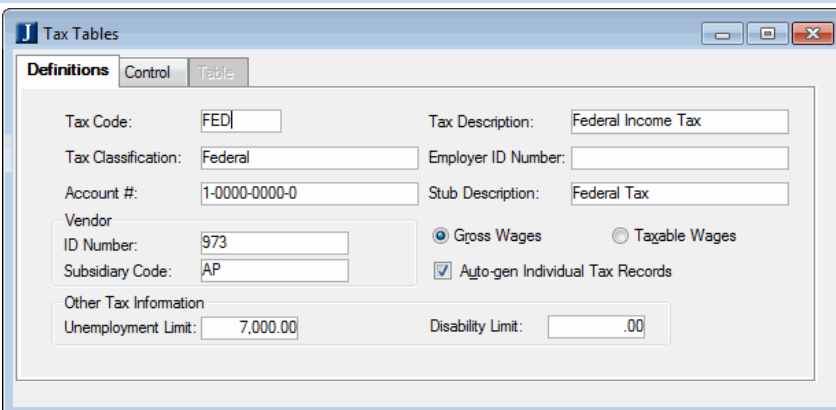


*If you are working with CRM Staff via JICS you will need to setup this table.*

## TAX TABLES

You will need to check your tax tables annually to ensure the tax rates are the same year-to-year.

On the **Definition** tab of the **Tax Tables** window, you can create a new tax code, or you can open an existing code by right-clicking on the Tax Code field and selecting the **Tax Code** option. When you open an existing tax code, you can edit or delete the information.



Tax Code:	FED	Tax Description:	Federal Income Tax
Tax Classification:	Federal	Employer ID Number:	
Account #:	1-0000-0000-0	Stub Description:	Federal Tax
Vendor		<input checked="" type="radio"/> Gross Wages	<input type="radio"/> Taxable Wages
ID Number:	973	<input checked="" type="checkbox"/> Auto-gen Individual Tax Records	
Subsidiary Code:	AP		
Other Tax Information			
Unemployment Limit:	7,000.00	Disability Limit:	.00



*Jenzabar will maintain the federal taxes and send out service packs mid-December so that all of your tables will be ready for the next year.*



**State level taxes will be your responsibility. You will need to go into the tax table and check the rates at the beginning of each year.**

On the **Control** tab of the **Tax Tables** window, you will be able to define the filing statuses that employees can use for a specific tax code. Once the tax codes and filing statuses are defined, you can set the tax limits and percentage rates on the **Table** tab.



The top screenshot shows the 'Control' tab of the 'Tax Tables' window. It contains the following fields:

- Tax Code: FED
- Tax Type: M Married
- Effective Date: 01/01/2013
- Standard Deduction: .00 Rate: 0.000000 Exemption: 3,900.00
- Additional Deduction: .00 Rate: 0.000000 Exemption: .00
- Other Deduction: .00 Rate: 0.000000 Exemption: .00
- Auxiliary Deduction: .00 Rate: 0.000000 Exemption: .00

The bottom screenshot shows the 'Table' tab of the 'Tax Tables' window. It contains the following fields:

- Tax Code: CO
- Effective Date: 01/01/1998
- Tax Type: Married
- Table with columns: Tax Bracket, Tax Base, Tax Rate
- Row 1: 000,004,450, .00, 0.05000



To access the Table tab, you must select a filing status from the Control tab.

## DIRECT DEPOSIT CONTROLS

Use this window to setup and allow direct deposit transactions from your organization into the employee's bank account.

You should only need to change information on this window if your organization changes banks, or if your bank changes their requirements.



Work with your banker to enter the information required. Your banker can also tell you what type of magnetic media is required.

The 'Direct Deposit Controls' window contains the following sections and fields:

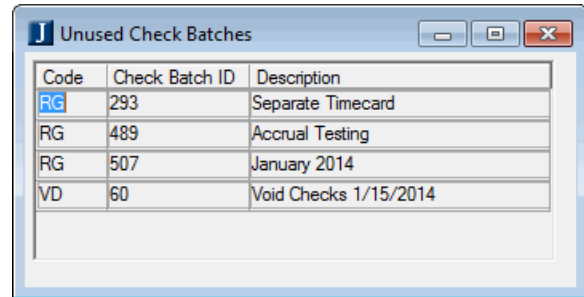
- File Header**
  - Origin: Immediate: 051400549 Name: School's Federal Tax ID
  - Destination: Immediate: 051400549 Name: Bank Federal Routing #
  - Ref. Code: Format Code: 1 Blocking Factor: 10
  - Record Size: 94 File Id Modifier: A DDP Priority: 1
- Batch Header**
  - Company Discretionary: Data: School Name - NA Date: 00/00/0000
  - Originating DFI ID: 05140054 Entry Description: PAYROLL
  - Service Class: 200 Entry Class: PPD Originator Status Code: 1
- Detail**
  - Discretionary Data: NA Transaction Code: Automated Debit
  - Bank Identification: 104102781 Bank Account No.: 132498
  - ☒ Allow Electronic Header Footer
  - ☒ Pad 9's to finish block in direct deposit File? File Name Extension: TXT



## UNUSED CHECK BATCH

From this window, you can review and delete check batches that have not yet been updated in the system after creating checks, direct deposits, and registers.

This window should remain empty. If you leave unused batches, the system will add the amounts to your totals. The only batches you should see in this window are your current, active batches.



Code	Check Batch ID	Description
RG	293	Separate Timecard
RG	489	Accrual Testing
RG	507	January 2014
VD	60	Void Checks 1/15/2014



**Do not delete an active batch you are currently working with.**



## Chapter 4. WORKING WITH EMPLOYEE RECORDS

When working with HR, it is important to keep the information on your employees up to date. This chapter will cover the windows you need to use in order to work with employee information.

### OBJECTIVES

At the end of this chapter, you will be able to:

- Work with the employee master
- View employee profiles and pay checks
- Distribute salaries and fringes
- Create contracts

### HR EMPLOYEE MASTER

Use this window to enter information needed in both the Payroll and Personnel modules for your organization's employees. You should complete the fields with as much detail as possible to ensure your HR processes will run properly.



If you need to enter a new name, you should always check Name Master before adding a new entry to avoid duplicate entries.

### HR Employee Master via Payroll

HR Employee Master via Payroll

ID # 500 Sarah A. Steadman

User Defined

Name Addresses Header Details Benefits Positions Biograph Taxes Payroll Achievements Personnel Miscellaneous

Name History

Last, First, Middle  
Name: Steadman Sarah Ann

Name Information  
Birth Name: Sarah Prefix: 3 Mrs  
Preferred Name: Sarah Suffix:  
Nickname: Joint Prefix:  
Title: Type: P Person Private  
Status: A Active Format:


Addresses  
Current: LHP Legal/home/permanent ad  
E-mail: sarah.steadman@jenzabar.net  
Mobile Phone  
Phone: 00000 (555) 540 9898  
Status: A Active Private

Other Details  
Source: Owner: PE Personnel  
Confirmed On: 10/31/2013 Stop All Mail  
Show On Web: Web FERPA Restricted



*The Achievements, Personnel, and Miscellaneous tabs are only active if your school also purchased the Personnel module and you have valid permissions. If you have both the Payroll and Personnel modules, all tabs will be available if you have the permissions. You will not have to switch between the via Payroll and via Personnel windows of the HR Employee Master.*

There are twelve tabs on the **Employee Master** window:

<b>Name</b>	<p>Information on Name tab is being pulled from the Name Master table, however you can edit existing information or add a new record. There is also a Name History option that will show you all the changes made to the name.</p> <div> You must have a valid ID# with all information saved before you can access other tabs on this window.</div>
<b>Address</b>	<p>Pulling information from the Maintain Address window, the Addresses tab allows you to view and edit the addresses for the user. The Address History option will track any changes made to the individual's address information.</p>
<b>Header</b>	<p>The Header tab holds the group and subgroup information. Each individual must belong to a group and subgroup, and can only belong to one group and one subgroup code. On this tab, you will determine full-time or part-time and whether the employee is active or inactive. You will also notice several checkboxes to indicate if the employee has a pension plan, has received their W4, or is a former student or employee.</p>
<b>Details</b>	<p>Details tab holds data relating to accrual benefits, contracts, and I9 details.</p>
<b>Benefits</b>	<p>Benefits tab will allow you to enter benefits information for an employee, such as benefits received, additional withholding, accruals, and special benefit rates. You can add benefits to an employee by right-clicking to <b>Add a Row</b> using the drop-down box to select the benefit. The benefits available are determined on the <b>Benefits Control</b> window.</p> <p>If you want a benefit to start at a later date, choose <b>Inactive</b> in the Status field and add a Start Date to indicate when the benefit will begin. This is a good option when you have a probationary period for new employees.</p> <p>While on this tab, you can right-click for more options.</p> <ul style="list-style-type: none"><li>When working with Gifts, you can right-click to <b>Gift Number/Gift Group Lookup</b> to find available options. This information will then link to the Development module so the gifts can be taken from the employee's pay.</li><li>You can use the right-click option for the <b>Cutoff Amounts</b> to define the amounts for a benefit within a calendar year. The cutoff amount cannot be exceeded within the designated time frame.</li></ul>

HR Benefit Cutoff Amount via Payroll

ID Number: 500 Sarah Ann Steadman

Benefit: 401K 401K

Year	Year Cutoff	Quarter Cutoff	Month Cutoff
2010	1000.00	.00	.00
2011	1100.00	.00	.00
2012	1200.00	600.00	.00
2013	.00	700.00	.00
2014	.00	.00	200.00





- When you are looking at other accrual items such as Vacation, you can right-click to go to the **History Taken** window that will show a list of all time taken by the employee.

Date	Amount
02/15/2009	3.00
01/01/2010	8.00
07/23/2010	4.00
02/18/2011	2.00
12/15/2013	8.00



*You will have to enter this data manually into the system.*

## Positions

Positions Tab is used to review or assign positions to an employee, and will describe what the employee does at your school. This window is broken into Active and Inactive positions. The active position is one (or more) job the employee currently holds. Inactive positions are jobs the employee used to have at your school.

For example Sarah Steadman was Graduate assistant before becoming the Head Accountant after graduating. Any available positions are listed in the left column under Active or Inactive positions. To view details about a specific position, select the position title in the left column.

**Active Positions**

Head Accountant

Position Code: ACCNT Position Title: Head Accountant ☒ Show On Web?

Position Description: Head Accountant

Department: Status: Primary Active Shift: Type: Salary Termination Reason: FTE: .00

Category 1: Start Date: 01/01/2000 End Date: 00/00/0000

Category 2: Supervisor: 503 Hope A. Fitzwater

**Inactive Positions**

Graduate Assist...

Position Code: GDAST Position Title: Graduate Assistant ☒ Show On Web?

Position Description: Graduate Student Assistant

Department: Status: Inactive Shift: 1 Day Type: Hourly Termination Reason: FTE: 1.00

Category 1: OFF Office personnel Start Date: 01/29/2014 End Date: 00/00/0000

Category 2: Supervisor: Not Found!




**An employee must have at least one position to be paid using the Payroll module.**

## Biograph

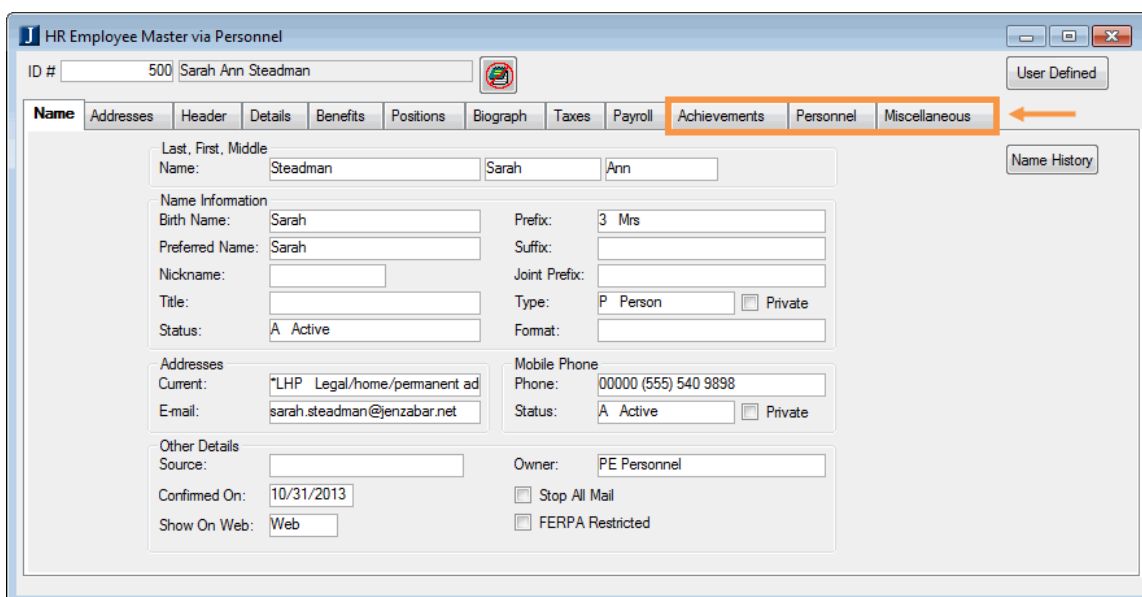
This tab is used to enter personal demographic information about an employee. This tab holds the same information as the **Maintain Biograph Information** window stored in the Biograph Master table.



<b>Taxes</b>	<p>You will use the Tax tab to record taxes that will be withheld for each employee. You will be able to determine the employee's filing status and whether they are exempt from any taxes codes.</p> <div><p>Prior to adding a tax row for your employees, you need to define the tax codes on the Tax Definition window.</p></div>
<b>Payroll</b>	<p>This tab contains two sections: Direct Deposit and W2 information.</p> <p>On the first part, you can determine amounts and priority for direct deposits, enter banking information, and set active or inactive status. If an employee that usually receives a direct deposit requests a check, you can select the <b>Create a check for this Direct Deposit</b> checkbox, the system will override the direct deposit and create a check when the payroll is run. You will need to go back to this screen and un-check this option to return to the direct deposit option.</p> <p>On the second part of the window, you can view the W2 history information and you can add information on the employee's W2 form that may have been missed.</p>

## HR Employee Master via Personnel

This window is the same as the HR Employee Master via Payroll window, however there are three additional tabs available only available through the Personnel module.



*The Taxes and Payroll tabs are only active if your school also purchased the Payroll module and you have valid permissions. If you have both the Payroll and Personnel modules, all tabs will be available if you have the permissions.*



## Achievements

This tab allows you to enter professional and educational achievements for an employee. You can add as many rows to this window as needed by right-clicking and adding a row. The **Education** section goes into a lot of detail, including the type of education, majors and minors, etc. Note that in order to enter education into the Achievements tab, the college or university the employee attended will need to be in the Name Master and have an ID Number. The **Affiliations** section is where you could add any professional organizations, accreditations, etc. In this section, you can type any affiliation information.

The screenshot shows the 'Achievements' tab with two sections: 'Education' and 'Affiliations'. The 'Education' section includes fields for ID Number, Name, Address, City, State, ZIP Code, Education Type, Education Received, Major, Minor, Years Completed, Completed When, License #, Date Expires, and Terminal Degree. The 'Affiliations' section includes an Affiliation field and a date range (From: 08/01/1995, To: 08/01/2016).

## Personnel

The Personnel Tab is used to enter emergency contacts and office locations.

The screenshot shows the 'Personnel' tab with two sections: 'Emergency Contacts' and 'Work Location'. The 'Emergency Contacts' section includes a table with columns for Last Name, First Name, Middle Name, Work Phone No., Home Phone No., Mobile Phone No., and Comment. The 'Work Location' section includes a table with columns for Location, Building, Room, Phone Number, Note, and Primary Work Location.



Any emergency contacts entered on this window will also appear on the Emergency Contacts via Personnel window.




## Miscellaneous

This tab contains various bits of information including details about the employee's hospital, doctor, dependents, driver's license, tenure, educational discounts, and an option to include the employee in the Staff Directory.

Form fields and values:

- Hospital Preferred Name: RMH
- Phone Number: 00000(000) 000 0000
- Doctor ID: [Dropdown]
- Insurance Elig Date: 06/01/2000
- No of Dependent Family Mbrs: 2
- Retirement Eligible Date: 06/01/2016
- Parking Space Assigned: 1a
- Education Discount Rate: .0000
- No of Family Members: [Field]
- Effective Date: 05/01/2010
- Next Review Dates: Salary: 05/04/2006, Performance: 07/08/2008
- Drivers License Number: BR-549
- State: VA Virginia
- ☒ Include Staff Directory
- ☐ Prior Worker's Compensation

## PAY INQUIRY

This window will show you the pay history for a particular employee. You can view the employee's pay information by check, year, quarter, or month. In addition, you can use the right-click feature to access benefits, taxes, timecards, and check details. On the **Checks** tab, you may see an attachment icon  next to a check date. This icon will allow you to view the pay stub if you have configured the system to create pay stubs.

Pay Inquiry Window: ID Number: 500 Sarah Ann Steadman

Checks Tab: Year, Quarter, Month

Check Date	Check Type	Check Number	Net Pay
09/15/2012	DD	1213	665.44
08/15/2011	DD	1210	991.50
08/15/2011	DD	1209	991.50
07/31/2011	DD	1200	867.82
07/31/2011	DD	1198	867.82
07/31/2011	DD	1196	867.82
07/31/2011	DD	1194	867.82
07/20/2011	DD	1198	-867.82
07/19/2011	DD	1200	-867.82
07/15/2011	DD	1192	867.82
06/30/2011	DD	1190	867.82
03/15/2011	DD	1188	871.50



## SALARY DISTRIBUTION

Salary distribution transactions are used to configure an employee's salary expense disbursement over a different number of periods than those in which they are paid.

Use the **Salary Distribution** window to create transactions that distribute salaries for salaried employees for the months in which their contracts are active.

**J Salary Distribution**

This option generates salary distribution journal entries.

Transaction Date: 01/11/2014

Fiscal Month to Process: [dropdown]

Period Begin Date: 01/01/2014

Period End Date: 01/31/2014

Group Code: SALRY

Subgroup Code: \*

☐ Summarize G/L journal entries

☐ Create Journal Entries?

Report Title: Salary Distribution - Jan 2014

Reports: <Original>

OK Cancel Customize



*This process is usually run once a month.*

## FRINGE DISTRIBUTION

You will use the **Fringe Distribution** window to begin generating fringe benefits separate from the normal pay run cycle.

This process generates fringe benefit transactions for fringes not created during the pay run process and only uses benefits that have a Plan Type of Fringe **nonpay run** on the **Benefits Control** window and are active in the employees Benefits/Accruals window. If the fringe is inactive but the start date is between the Period Begin and Period End dates entered on the **Fringe Distribution** window, this process activates the fringe.

**J Fringe Distribution**

This option generates fringe transactions based on selection criteria defined

Transaction Date: 01/31/2014

Period Begin Date: 01/01/2014

Period End Date: 01/31/2014

☐ Summarize G/L LB Journal Entries

☐ Summarize G/L IV Journal Entries

Report Title: Fringe Distribution - Jan 2014

Process Cancel Customize



## CONTRACTS

In addition to full- and part-time positions, you can also offer your employees contracts for positions that may not require full or even part-time dedication.



Contracts are designed to work with people already in your system as an employee. You cannot create a contract for a person that is not an active employee.

### Creating a Contract

There are two ways you can create a contract. You can add a new contract manually from the **Employment Contracts Master** window to associate Benefits and Contracts with a specific ID Number; or you can generate the contract data from Payroll based on the employee's current position and benefits from the **Generate Contracts from Payroll** window.

#### Option One: Employment Contracts Master

Manually enter contract information into the top portion of the Employment Contracts Master.

#### Option Two: Generate Contracts from Payroll

To create a new contract, simply enter an ID number (or group number if you are going to add a contract for multiple people) and click **OK** on the **Generate Contracts from Payroll** window to start the process.

You will receive a message letting you know when the process has successfully completed and you can view your contract on the **Employment Contracts Master** window.



## Working with Contracts

Back on the **Employment Contracts Master**, you will see the contract details for the employee.

**Employment Contracts Master**

ID # 100675 Mary A Smith

Contract

> Contract Number: 1 Contract Name: 2014-2015 Contract Contract Group: STAFF Staff Contracts

Contract Date: 07/01/2014 Last Print Date: 00/00/0000 00:00:00

Be sure to enter a contract name before modifying the contract records.

Benefits

Benefit Code: DENTF D Description: Dental Family

Benefit Text: With this contract, you will receive the benefit: WORK\_BENEFIT\_DESC.

Last Changed Date: 03/06/2014 03:04:4

Benefit Code: FRNPA Fr Description: Fringe Nonpay

Benefit Text: With this contract, you will receive the benefit: WORK\_BENEFIT\_DESC.

Last Changed Date: 03/06/2014 03:04:4

Benefit Code: GIFNB Gf Description: Gift New Baseball Field

Benefit Text: With this contract, you will receive the benefit: WORK\_BENEFIT\_DESC.

Last Changed Date: 03/06/2014 03:04:4

Positions

Org Position: CAFE Cafeteria Duties

Description: Cafeteria Duties

Contract Text: You have been offered a contract for the @@OrganizationPositionDescription@@ position at @@ContractAmount@@ for the period of @@ContractLength@@ effective @@EffectiveDate@@. Your current rate is @@Curr

Last Changed Date: 03/06/2014 03:04:53

Contract Amount: .00 Length: Effective Date: 00/00/0000

Accepted/Rejected: ☐ Accepted ☐ Rejected ☒ Undecided

Accepted/Rejected Date: 00/00/0000 ☐ Uploaded to Payroll?

Notice that all of the information has automatically been entered into the fields.

**Generate Contract Data**

ID # 100675 Mary A Smith

Contract Group: [Dropdown]

Begin Contract Date Range: 00/00/0000

End Contract Date Range: 00/00/0000

Data to Generate: ☐ Benefit Data ☐ Position Specific Data ☒ Both

Selection Query: <Original> [Dropdown] Customize

OK Cancel

Now that you have all of the contract information on the window, you may want to make the text appear without all the table names and coding. There are two ways to populate the data.

- You can right-click on a field and select **Update Contracts Benefit/Positions Data** to update the benefit and position data individually.
- You can also use the **Generate Contract Data** window, enter the employee's ID number and click OK.





Once you have updated the data for an individual or contract group, where you used to see table information and coding on the Employment Contracts Master window, you will now see clean and readable information for that contract.

The screenshot shows the 'Employment Contracts Master' window. At the top, the ID # is 100675 and the name is Mary A Smith. Below this, the 'Contract' section displays: Contract Number: 1, Contract Name: 2014-2015 Contract, Contract Group: STAFF Staff Contracts, Contract Date: 07/01/2014, and Last Print Date: 00/00/0000 00:00:00. The 'Benefits' section on the left lists two benefits: 'DENTAL Family' with description 'Dental Family' and 'FRINGE Nonpay' with description 'Fringe Nonpay'. The 'Positions' section on the right shows 'Org Position: CAFE Cafeteria Duties' with description 'Cafeteria Duties' and contract text: 'You have been offered a contract for the Cafeteria Duties position at \$3,500.00 for the period of effective'. It also shows 'Last Changed Date: 03/06/2014 03:09:53', 'Contract Amount: 3,500.00', 'Length: 9 9 Months', 'Effective Date: 07/01/2014', and 'Accepted/Rejected' status as 'Undecided'.

## Viewing and Editing Contracts

Once your contracts have been created, you can view and edit contracts for individuals and modify groups of contracts from the **Employment Contracts Edit** window. This is also a nice way of looking at all the contract in a more previewed format.

The screenshot shows the 'Employment Contracts Edit' window. At the top, the ID # is 100675 and the name is Mary A Smith. Below this, the 'Contract Group' is STAFF, 'Organization Position' is empty, 'Benefits Code' is empty, 'Begin Contract Date' is 00/00/0000, 'End Contract Date' is 00/00/0000, 'Begin Last Print Date' is 00/00/0000, and 'End Last Print Date' is 00/00/0000. On the left, a tree view shows the contract structure: '100675 - Mary A Smith' > '1 - 2014-2015 Contract' > 'CAFE - Cafeteria Duties' (selected) > 'DBA - DBA Position DESC' > 'DENTAL - Dental Family' > 'FRINGE - Fringe Nonpay' > 'GIFNB - Gift New Baseball Field' > 'SICK - Sick Time' > 'VAC - Vacation Time'. The main area shows 'Contract' details: ID Number: 100675, Mary A Smith, Contract Number: 1, Contract Name: 2014-2015 Contract, Contract Group: STAFF Staff Contract, Contract Date: 07/01/2014, Last Print Date: 00/00/0000. The 'Position' section shows 'Pos Seq Num: 2', 'Org Position: CAFE Cafeteria Duties' with description 'Cafeteria Duties', and contract text: 'You have been offered a contract for the Cafeteria Duties position at \$0.00 for the period of effective Your current rate is @@Cur'. It also shows 'Last Changed Date: 03/06/2014 03:09:53', 'Contract Amount: 3,500.00', 'Length: 9 9 Months', 'Effective Date: 07/01/2014', and 'Accepted/Rejected' status as 'Undecided'.





Once you have setup and generated your contracts, you can run the **Contracts Audit/Error Report**. There are two reports you can generate from this window:

- **Audit:** looks at contracts that fit the criteria selected, and allows you to review the information
- **Error:** pulls information from contracts where there may be missing or incorrect data, such as Contract Text, Benefit Text, and Contract Amount

## Printing Contracts

Once you have generated the employment contracts and ensured that the information is complete and correct, the final step is to print the contracts for employees. You can print by individual ID numbers or contract groups.



*Be sure to enter a Signature Name and Title that will appear at the bottom of the contract letter.*



## Chapter 5. PROCESSING PAYROLL

Whether you process payroll once a week or once a month, it is important to follow all the steps in the process. This chapter will walk you through the steps necessary for a successful payroll run.

### OBJECTIVES

At the end of this chapter, you will be able to:

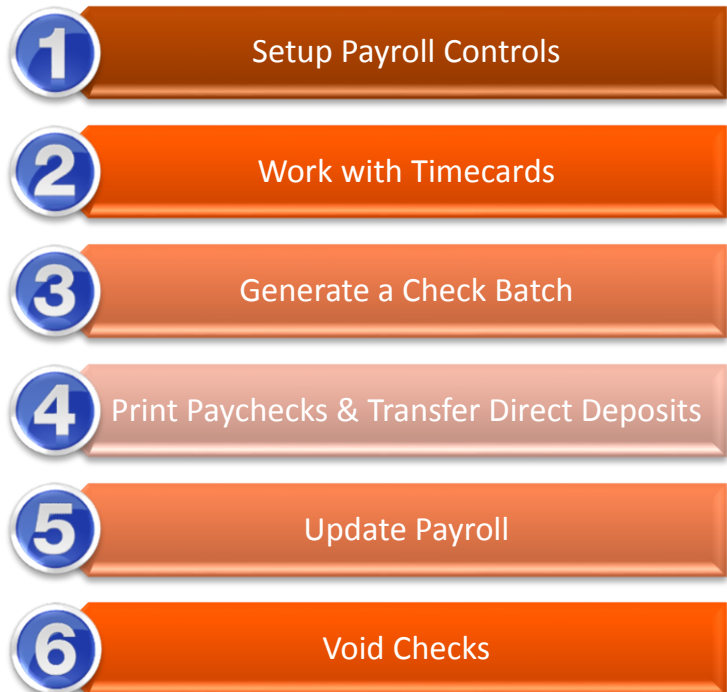
- Setup pay period checks
- Utilize timecards
- Run the payroll process
- Void checks

### PROCESSING PAYROLL OVERVIEW

There is one day that all employees look forward to: Pay Day. While there are many important processes in Human Resources, money is probably one of the most important to your employees. Getting the paychecks out on time and with the correct amount will save you a lot of hassle.

On the right, you will see a quick overview of the steps you need to follow in the Payroll module in order to complete a payroll run.

In the remainder of this chapter, you will follow these six steps in much more detail.





## STEP 1: SETUP PAYROLL CONTROLS

The first step of processing payroll is to make sure your **Payroll Controls** window is updated with the correct information. On the **Details** tab, you will determine the pay period and check dates. You will also need to ensure that the direct deposit and check numbers are correct and that your year and quarter dates are updated to the most recent periods.

If you are running checks for bonuses or other additional pay, you may want to select the **Suppress Voluntary Deductions** checkbox that will prevent amounts such as 401K and insurance fees from being removed from the check.

On the **Messages** tab, you can add any notes or comments that will be added to the check or direct deposit.

For example, if it is the first paycheck of the new year, you might say “Welcome back from winter break” or “Happy New Year.”

The screenshot shows the 'Payroll Controls' window with the 'Details' tab selected. The window contains several input fields for payroll setup:

- Period Dates:** Begin: 01/01/2014, End: 01/31/2014, Check Date: 01/31/2014
- Direct Deposit:** Type: DD, Number: 1214
- Check:** Type: PR, Number: 25925
- Calendar Year:** 2014
- W2 Year:** 2014
- Workstudy Year:** 2014
- Overtime Percent:** 1.5000
- Encumbrance PO Number:** (empty)
- Workstudy Term:** FA
- Quarter End Date:** 03/31/2014
- ☐ **Suppress Voluntary Deductions**

The screenshot shows the 'Payroll Controls' window with the 'Messages' tab selected. The window contains two sections for adding messages:

- Check Messages:**
  - Message 1: This message is for all employees
  - Message 2: (empty)
  - Message 3: Happy New Year!
- Direct Deposits - Stub Messages:**
  - Message 1: This is the DD message for all checks
  - Message 2: (empty)
  - Message 3: (empty)



*This window does allow you to separate check messages from direct deposit messages.*



## STEP 2: WORK WITH TIMECARDS

Keeping track of an employee's time, is an important feature of the payroll system. Using timecards will allow you to create batches of your current employees for payroll. If you have Jenzabar Internet Campus Solution (JICS) and use the CRM Staff module, you can also setup timecards that will allow employees to enter their work hours online, and assign supervisors to approve their time.

### Option One: Generate Timecards

You will use this window to mass generate timecards for employees based on the current position information.

Each time you run this procedure, you will need to create a unique Batch Description to help you distinguish this batch from others later in the payroll process.



*You can create a custom query using InfoMaker by clicking the **Customize** button. Some common custom queries may include work-study, hourly, salary, etc.*

When you click **OK**, you will receive a report preview with the employees, job and contract information, pay details, and any warnings or notes for each individual. Once you have seen the report, you can check to make sure amounts are correct and then change or adjust as necessary.

Emp-id#	Employee Name	Position Title	Amt Paid	Contract Amount	Contract Period	Num Of Pay Prds	First Pay Amt
425642283	HOLMES, SR., HORACE C.	President	9,099.75	09,197.00	07/01/2010 - 00/00/0000	12.00	9,099.75

Gross pay exceeded contract amount, pay adjusted to zero. No timecard entry created.

### Option Two: Timecard Entry

If you do not want to auto-generate your timecards, and would prefer to take a manual approach, you can use the **Timecard Entry** window to enter employees individually.

You can also use this window to review employee timecards, update existing timecards, and manually enter new/additional timecards after you have run the Generate Timecards feature.

When the window opens, you will see the **Batch** tab where your batches will be listed, and you can setup the Batch tab to show what amounts of Regular, Overtime, and Other hours you should have on your timecards for the batch.



These amounts are what the *Validate Hours* feature will check against when reviewing your batches.

Batch ID#	Batch Description	Regular Hours	Overtime Hours	Other Hours 1 Description	Vacation Hours
191	Staff Timecard Interface for 8/	.00	.00	Vacation	.00
192	Federal Tax 2013	.00	.00	Vacation	.00
193	Januray 2014 Payroll	9,099.00	10.00	Vacation	8.00



This window may look different depending on the *Validate Hours* setting from the *Configure Payroll* window.

At the top of the window, you will notice three radio button options: select **Regular** for the timecards to be used in the pay run, **Manual** if you need to record a manual check that has already been issued, and **Check Calculator** if you want to preview the check without actually paying the employee.

When you go to the **Long Timecard Entry** tab you will see information about each individual and the hours they have accumulated during the pay period. Notice how the individuals differ based on salary or hourly pay.

On an individual's timecard, you will see several checkboxes that will allow you to separate timecards or suppress items. You can also add or remove employees from the timecard batch, as well as record or update the employee's hours.

ID Number: 500 Sarah Ann Steadman

Group/Subgroup: 1 Primary

Org Position: ACCNT Head Accountant Salary

Account Number: 1-5100-5400-0 Project Code:

Shift: 1 Day Check Group Number:

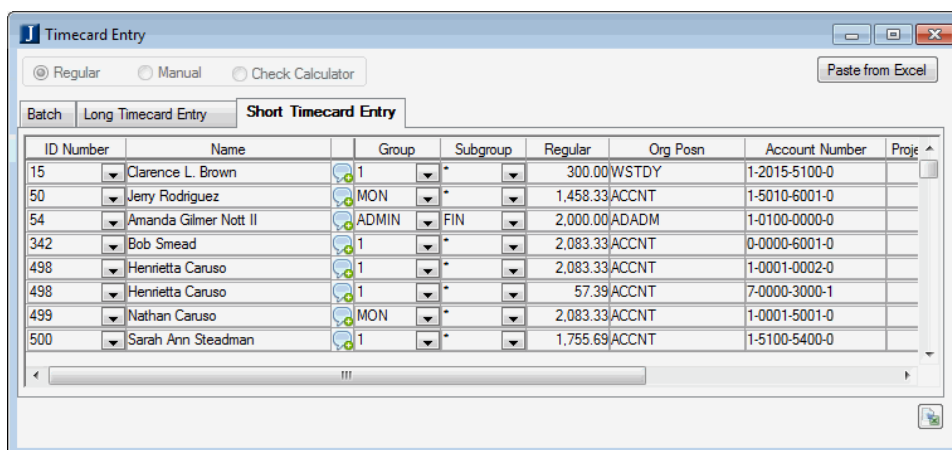
Direct Deposit Group: 1

Description	Hours	Regular Hours	Regular Pay	Rate	Overtime Hours	Adjustment Pay
1: Vacation	.00	80.00	1,755.69	.00	.00	.00
2: Sick Leave	8.00					
3: Holiday Pay	.00					
4: Other	.00					

☐ Separate Timecard  
☐ Suppress Fringes  
☐ Suppress Direct Deposits  
☐ Suppress Deductions  
☐ Suppress Accruals



On the **Short Timecard Entry** tab, you will see a summarized list of all your employees and their timecards. You will see overall information for the employees with their regular and overtime hours and any adjustments.



ID Number	Name	Group	Subgroup	Regular	Org Posn	Account Number	Proj
15	Clarence L. Brown	1	*	300.00	WSTDY	1-2015-5100-0	
50	Jerry Rodriguez	MON	*	1,458.33	ACCNT	1-5010-6001-0	
54	Amanda Gilmer Nott II	ADMIN	FIN	2,000.00	ADADM	1-0100-0000-0	
342	Bob Smead	1	*	2,083.33	ACCNT	0-0000-6001-0	
498	Henrietta Caruso	1	*	2,083.33	ACCNT	1-0001-0002-0	
498	Henrietta Caruso	1	*	57.39	ACCNT	7-0000-3000-1	
499	Nathan Caruso	MON	*	2,083.33	ACCNT	1-0001-5001-0	
500	Sarah Ann Steadman	1	*	1,755.69	ACCNT	1-5100-5400-0	



For each active position the individual has, you will see a separate timecard. Therefore, if an employee has three positions at the school, they will have three timecards listed.

While on the **Long** or **Short Timecard Entry** tabs, there are several right-click options you can utilize:

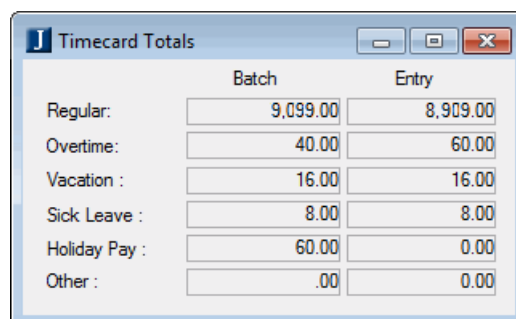
- **HR Group Lookup:** will allow you to search and select an HR group for the employee
- **Separate Timecard Benefits/Taxes:** will separate tax and benefits from pay received and allow you to make changes to the rates or amounts for benefits and taxes (to use this feature, you must check the Separate Timecard checkbox on the Long Timecard Entry tab)
- **Timecard Selection:** allows you to choose which position/salary record you are going to pay
- **Timecard Sort/Select:** provides you with a quick way to jump to a specific employee timecard
- **Timecard Other Pay:** this shortcut will open a window for the individual, and you can select the type of benefit, amount of time used, and the date the time was taken



*Be aware that selecting Separate Timecards will cause taxes to be calculated differently than grouping multiple timecards together.*

If you selected **Warning** on the **Payroll Configuration** window, when you close the Timecard Entry window, the **Timecard Totals** window will appear. This is a check window, allowing you to see how the totals you entered on the **Batch** tab add up to the actual hours in your timecards. If these totals do not match up as expected you will need to go back through your timecards until the numbers match.

If you selected **Error**, in addition to seeing this window, you will receive an error message letting you know that you must correct the issues before you can continue.



	Batch	Entry
Regular:	9,099.00	8,909.00
Overtime:	40.00	60.00
Vacation :	16.00	16.00
Sick Leave :	8.00	8.00
Holiday Pay :	60.00	0.00
Other :	.00	0.00

If you selected **No Check**, the system assumes all timecards are correct and will continue without showing you this window.

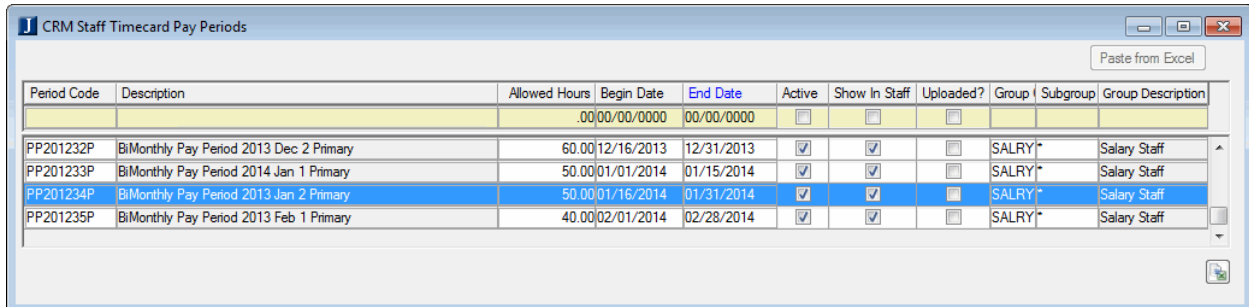


## Option Three: Timecards in CRM Staff

If you will be using the JICS CRM Staff portlet for your timecards, you will need to setup pay periods in EX and the actual timecards in JICS.

### CRM Staff Timecard Pay Periods

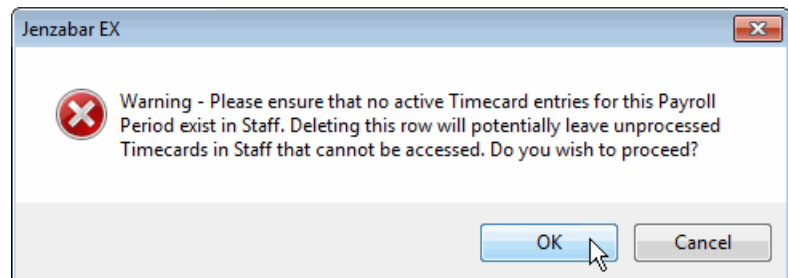
This window will configure the available timecards for your employees. You can set the number of allowed hours, pay period dates, and make the timecards active and visible on CRM Staff.



Period Code	Description	Allowed Hours	Begin Date	End Date	Active	Show In Staff	Uploaded?	Group	Subgroup	Group Description
		.00	00/00/0000	00/00/0000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
PP201232P	BiMonthly Pay Period 2013 Dec 2 Primary	60.00	12/16/2013	12/31/2013	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SALRY*		Salary Staff
PP201233P	BiMonthly Pay Period 2014 Jan 1 Primary	50.00	01/01/2014	01/15/2014	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SALRY*		Salary Staff
PP201234P	BiMonthly Pay Period 2013 Jan 2 Primary	50.00	01/16/2014	01/31/2014	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SALRY*		Salary Staff
PP201235P	BiMonthly Pay Period 2013 Feb 1 Primary	40.00	02/01/2014	02/28/2014	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SALRY*		Salary Staff

Similar to the Payroll Control window, the **CRM Staff Timecard Pay Periods** window will create batches for the pay period specified. Each row in this window becomes a batch and will remain in the list unless you delete the row.

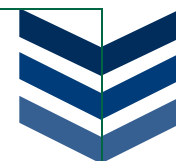
If you no longer need a pay period, you can delete it by right-clicking to **Delete Row**. You will receive a warning making sure you do not delete current timecards, but if you are sure you no longer need the pay period click **OK** to continue.



*If your salary staff is not required to enter their time into a timecard daily, then maybe you only create separate timecard pay groups for your hourly and salary staff. Then you can setup your timecards in JICS to allow your salary staff to enter their time (regular, sick, vacation, etc.) for an entire pay period while hourly staff enters their hours each day.*



If you are using timecards in CRM Staff you must create the pay period batches in the CRM Staff Timecard Pay Periods window.



## Timecard Entry – CRM Staff

When using CRM Staff, your employees will be able to enter their hours through the online portal. You will need to decide how to setup the timecards based on what options you want your employees to have when entering their time.

### Administrative View

When logged in as an administrator, you will have the option to review your own employee information, setup and approve timecards for your staff, and enter hours into your own timecards.

The screenshot shows the Jenzabar University Employee portal. The top navigation bar includes links for Home, CRM Candidate, CRM Student, CRM Faculty, Employee, Course Evaluation, Admissions, Admin, Academics, Budget, Campus Life, and more. The user is logged in as Alexis Dawn O'Donnell. The left sidebar shows the Employee section with a Default Page and Quick Links for My Pages, JICS GO, Google Search, and cnn. The main content area is titled 'Employee' and includes a 'My Employee Information' section with links to review pay statements, deduction information, position information, tax information, dependent information, and time off accrual. Below this is the 'Timecard Approval' section, which includes a 'Your Pay Groups' table. The table lists Active Periods for Your Pay Groups, with columns for Pay Group, Period End, and Status. The table shows four pay groups: Hourly Employees, Salaried Employees, and Workstudy Employees, each with two periods (1/15 and 3/15) and a status (Past or Current). A callout points to the 'Employee' tab in the navigation bar, stating 'Go to the Employee tab'. Another callout points to the 'Sign into JICS as a supervisor or administrator' link, stating 'Sign into JICS as a supervisor or administrator'. A third callout points to the 'My Employee Information' section, stating 'You will have the option to review your personal employee details'. A fourth callout points to the 'Your Pay Groups' table, stating 'In this section, you can click on a Pay Group or Period End date to approve or deny timecards submitted by your staff.' A fifth callout points to the 'Timecard Entry' section, stating 'If you have pay periods that you need to enter your own time for, you will see a pay period listed here'. The 'Timecard Entry' section shows a message: 'You have no pay periods available for this position and date. View all pay periods.'

**JENZABAR UNIVERSITY** Welcome back Alexis Dawn O'Donnell ( Personal Info | Logout )

Home CRM Candidate CRM Student CRM Faculty **Employee** Course Evaluation Admissions Admin Academics Budget Campus Life more

You are here: Employee > Default Page

**Employee**

Default Page

**Quick Links**

My Pages

JICS GO

Google Search

cnn

**Employee**

**My Employee Information**

Review your pay statements

Review your deduction information

Review your position information

Review your tax information

Review your dependent information

Review your time off accrual

**Timecard Approval**

**Your Pay Groups**

Active Periods For Your Pay Groups Current

Pay Group	Period End	Status
Hourly Employees	1/15	Past
	3/15	Current
Salaried Employees	1/15	Past
	3/15	Current
Workstudy Employees	1/15	Past
	3/15	Current

Or go to the main screen

**Timecard Entry**

You have no pay periods available for this position and date. View all pay periods.

Go to the Employee tab

Sign into JICS as a supervisor or administrator

You will have the option to review your personal employee details

In this section, you can click on a Pay Group or Period End date to approve or deny timecards submitted by your staff.

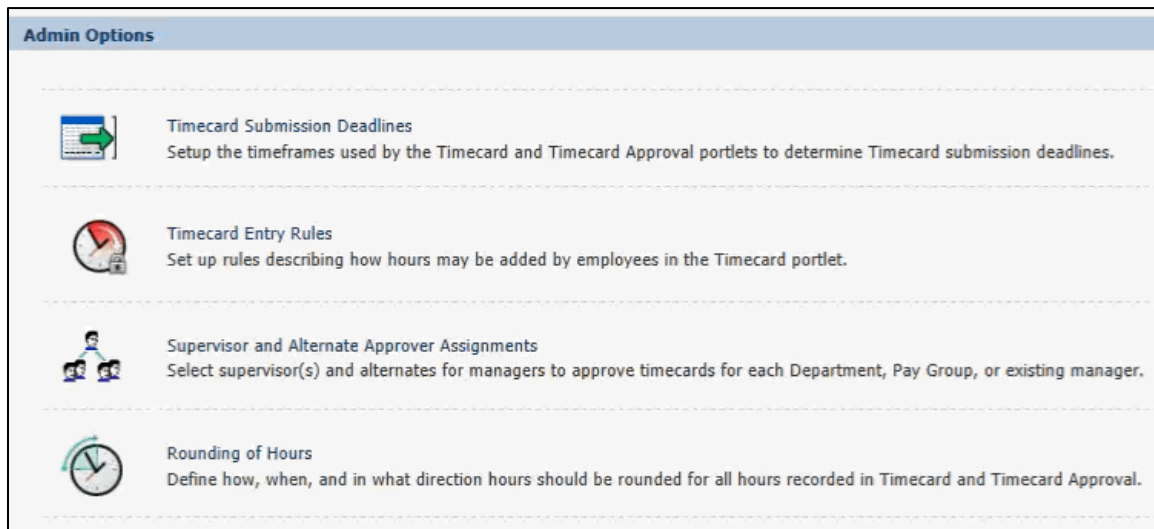
If you have pay periods that you need to enter your own time for, you will see a pay period listed here





## Timecard Approval

When you click on **Timecard Approval**, you will see the available timecards you need to review, as well as a list of groups where you are designated as a supervisor. As a supervisor, you have the option to view, edit, and submit timecards for the pay groups listed. In addition to the timecards and pay groups, you will have an **Admin Options** link at the top of the window. When you click this link, you will be presented with options that will help you determine how the timecards look and work for your employees.



- **Timecard Submission Deadlines:** from this section you will determine deadlines for your employees and managers/supervisors
  - *Time Entry Cutoff Date* – determine how many days an employee has to enter their hours after the end of the pay period
  - *Time Entry Submission Deadline* – determine how many days after the Time Entry Cutoff date the manager/supervisor has to approve and submit the employee's timecards to Payroll
- **Timecard Entry Rules:** In this section, you will determine if employees can enter hours for future days and times. If you want employees to be able to enter hours beyond the current time, you can check the checkbox.
- **Supervisor and Alternate Approver Assignments:** If you want to change the supervisor or approvers for specific pay groups or managers, you can assign or un-assign them from this section.
- **Rounding of Hours:** this section will allow you to determine if you want to round the hours entered by your employees to the nearest 5, 15, or 30 minute interval and if you want the rounding to always round up, down, or to the closest interval. You can also choose to not round hours.



**Timecard Approval - Pay Group Period**

**Workstudy Employees Pay Group**

Go to: Pay Groups | All Pay Periods

Active Pay Periods: 3/1/2014 - 3/15/2014 **Current:** Time Entry for this pay period closes on 3/30/2014

Pay Period Ending: 3/15/2014 (Current)

Employee Info		Hours					
<input type="checkbox"/>	Name	Position	Regular	Other	Off	Total	Final Status ?
<input checked="" type="checkbox"/>	Mia Nancy Newname	Found	18.75	--	2.00	20.75	Saved
<input type="checkbox"/>	Mia Nancy Newname	Hum Res Mgr	--	--	--	--	No Hours
<input type="checkbox"/>	Mia Nancy Newname	TMOPH	--	--	--	--	No Hours
<input type="checkbox"/>	Mia Nancy Newname	Workstudy # 2	--	--	--	--	No Hours

Contact Selected Employees Edit All Regular Hours

**Submit Selected Timecards To Payroll**

Time Entry for this pay period closes: 3/30/2014 - Please submit all timecards before: 4/14/2014

Once you have setup your Admin Options and your staff enters and finalizes their hours, you can approve their timecards and send them to payroll.

While on the **Timecard Approval** page, you can see a list of your Pay Groups. When you select a Pay Group, you will see a list of people in the group along with their hours. To submit a timecard to payroll, select the checkbox next to the names you want to submit and then click the **Submit Selected Timecards to Payroll** button at the bottom of the window.

If you need to view/edit an employee's timecard before submitting it to payroll, you can click the name of the individual to open the timecard and view the details. Once on the View Timecard page, you can review the information and if you need to make edits, you can click Edit Hours/Add Comments. From timecard approval, if you know you need to make an edit, you can click on the icon.

**Timecard Entry**

Timecard for Mia Nancy Newname \*\*Please click position tab prior to entering time

Switch to Calendar View Timecard Settings

Found Hum Res Mgr TMOPH Workstudy # 2 **Choose a position**

Saturday 3/1 - Saturday 3/15

Time Entry Cutoff Date: 3/30/2014

Time Entry Submission Deadline: 4/14/2014

Finished entering hours for this period? Click here to finalize **finalize the hours once you are finished making changes**

**Total Period Hours: Summary**

Regular Hours:	18.75
Other Hours:	0.00
Time Off Hours (Sick Time):	2.00
<b>Total</b>	<b>20.75</b>

**Enter your hours for this pay period:**

	Clock In	Clock Out	Hours Type	Subtotal
Sat 3/1	: AM	: AM	Regular	--
	: AM	: AM	Regular	--
Sun 3/2	: AM	: AM	Regular	--
	: AM	: AM	Regular	--
Mon 3/3	7:00 AM	3:00 PM	Regular	8.00
	: AM	: AM	Regular	--

**You can change these settings to show you a calendar or grid view and select any regular days off (such as weekends)**

**Make changes to existing hours or add new rows to enter hours**

Once you have edited the timecard and added any comments, be sure to save your changes at the bottom of the pay period before finalizing the timecard. You are now ready to submit the timecard to the payroll department.



Once a supervisor submits the timecard to payroll, there is no way to un-submit the timecard. Be sure you review your timecards before clicking the Submit Timecard to Payroll button.

When you submit a timecard, you will see a new section listing the submitted timecards for that pay period.

Previously Submitted Timecards for this Period:							
Employee Info			Hours				
Name	Position		Regular	Other	Off	Total	Final Status ?
Mia Nancy Newname	Found		18.75	--	2.00	20.75	Submitted

Meanwhile, back in EX on the **Timecard Entry** window, you will see that the system created a batch for the timecard you submitted.



*You can tell the difference between the CRM Staff and Manually entered batches by their Batch Descriptions.*

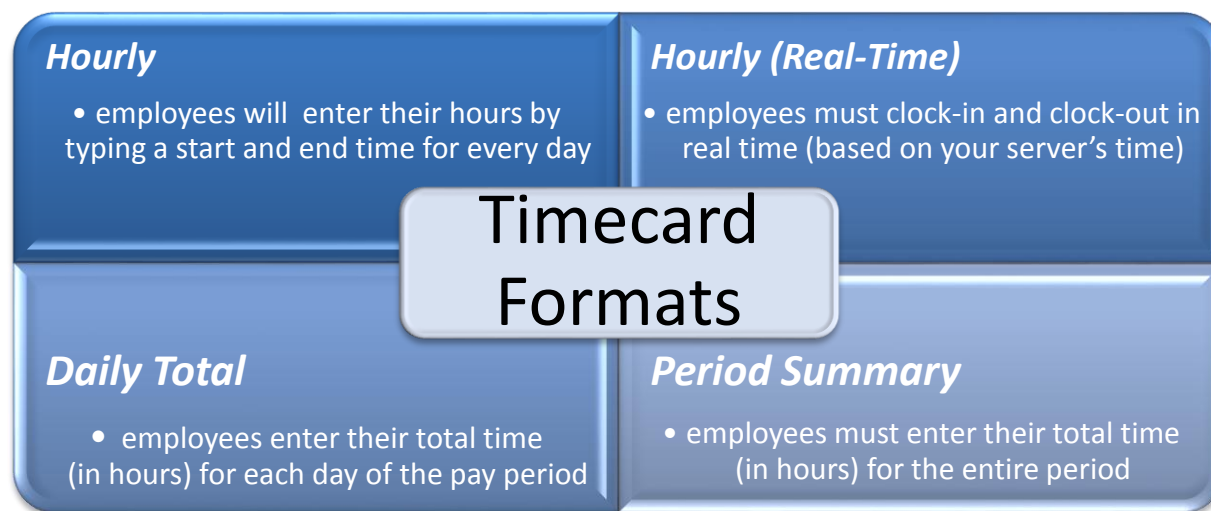
If you then look at the **Long Timecard Entry** for the Timecard submitted through JICS, you will see the hours listed for the employee, as they were displayed on the CRM Staff Timecard.



## Timecard Entry

You will need to setup your timecards for each Pay Group to determine how you want the timecards to work. Select a Pay Group from the Timecard Approval page and then click the **Change** link next to Timecard Format.

You can choose from four timecard formats:



Below are screenshots and details about each of the four timecard formats.



If you want to change all of your timecards, each Pay Group must be changed individually.



## Hourly

In the Hourly timecard format, employees will have to manually enter their daily hours into the clock-in/clock-out time slots. Employees with more than one position will need to be careful when entering time, and be sure to select the correct position before saving.

As long as the employee has not finalized their timecard for approval, they can click on a day to edit or enter their hours. Before the **Time Entry Cutoff Date**, listed below the calendar on the timecard, the employee must **finalize** their hours so that their supervisor can approve and send the details to payroll.

**Found** Hum Res Mgr TMOPH Workstudy # 2

**Saturday 3/1 - Saturday 3/15**

Click a day on the calendar to edit your hours.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

**Time Entry Cutoff Date: 3/30/2014**

**Time Entry Submission Deadline: 4/14/2014**

**Enter your hours for Monday 3/3/2014:**

Clock In	Clock Out	Regular	Other	Total
7:00 AM	3:00 PM	8.00		8.00

**Your Comments: (Optional)**

**Save Hours And Comments** **Cancel**

**Summary**

Total Period Hours:	
Regular Hours:	18.75
Other Hours:	0.00
Time Off Hours (Sick Time):	2.00
<b>Total:</b>	<b>20.75</b>

**Finished entering hours for this period?**  
Click here to finalize

**Callouts:**

- If you have more than one position you will see a tab for each position.
- The red calendar days indicate that no data has been entered
- Enter or edit time for previous dates
- Choose a type for your hours (such as Regular, Sick Time, and Overtime)
- Add a row to include more hours
- Add comments for your supervisor



### Hourly (Real-Time):

In the Hourly Real-Time timecard format, employees will need to log into JICS to click the **Clock In** and **Clock Out** buttons. In this format, employees cannot edit hours or add hours to previous dates. If an employee forgot to clock in, it will be the supervisor's responsibility to edit the timecard. This timecard format also does not allow for overtime, sick time, or vacation leave.

The screenshot shows the JICS timecard interface for the period Saturday 3/1 - Saturday 3/15. The interface includes a calendar view, a summary of total hours, and a detailed view for Wednesday, 3/5. Callouts provide the following information:

- Notice that you cannot edit your timecard in the Hourly Real-Time format**: Points to the top of the interface.
- Here you can see how the timecard rounded the Clock In time**: Points to the "2:07 PM" time entry.
- To start the day, you will have to click **Clock In****: Points to the "Clock In" button in the detailed view.
- Once finished for the day, click **Clock Out** and the total hours will appear**: Points to the "Clock Out" button in the detailed view.
- You can add comments for your supervisor here**: Points to the "Your Comments" text area.

The interface also displays the following information:

- Found**: Hum Res Mgr, TMOPH, Workstudy # 2
- View All Periods**: Link to view all periods.
- Total Period Hours**: Regular Hours: 0.00, Other Hours: 0.00, Time Off Hours: 0.00, Total: 0.00.
- Time Entry Cutoff Date**: 3/30/2014
- Time Entry Submission Deadline**: 4/14/2014
- Finished entering hours for this period?**: Click here to finalize
- Clocked in at 2:15 PM (Regular Hours)**: Status for Wednesday, 3/5.
- Clock Out**: Button to end the day's entry.
- Your Comments: (Optional)**: Text area for supervisor comments.
- Save Comments** and **Cancel**: Buttons to save or discard comments.



### Daily Total

In the Daily Total timecard format, employees will enter the number of hours they spent working for an entire day, rather than entering a start and stop time. They will have the option to include regular, overtime, sick time, and vacation leave for the current or previous days.

Sem Asst Dean

Saturday 3/1 - Saturday 3/15

Click a day on the calendar to edit your hours.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
2	3	4	5	6	7	8
9	10	11	12	13	14	15

Total hours for Wednesday 3/5/2014:

Hours Worked

Other Hours  Overtime

Time Off Hours  Sick Time

Total: 0.00

Save Hours



The Daily Total option could be a good choice if you have employees that are both salary based and hourly in one Pay Group.

### Period Summary

In the Period Summary timecard format, employees will only enter their hours once per pay period instead of daily. Like the Daily Total option, employees can enter hours for regular, overtime, sick time, and vacation leave, but only for the current pay period.

Sem Asst Dean

Saturday 3/1 - Saturday 3/15

Click a period on the calendar to edit your hours.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
2	3	4	5	6	7	8
9	10	11	12	13	14	15

Total hours for this pay period:

Hours Worked

Other Hours  Overtime

Time Off Hours  Vacation Time

Total: 0.00

Save Hours



The Period Summary option might be a good choice if your Pay Group is salary based. You could then track sick, vacation, or overtime hours without asking them to enter regular hours on a daily basis.





### STEP 3: GENERATE A CHECK BATCH

When you have setup your payroll controls and all of your timecards are complete, you will need to review your payroll information and generate a check batch from the **Pay Run Edit** window. Select your batch and create a description, then click **OK**.

This will run several reports so that you can review details and pay amounts of the pay batch to ensure accuracy.

- **Pay Run Error:** will show any errors or warnings that you need to be aware of before continuing in the payroll run
- **Taxes and Net Pay:** will display tax, deduction, and fringe information for each individual within a group/subgroup
- **Multiple Checks Listing:** will show any employees receiving more than one check for the pay period
- **Deductions Edit:** will list the available deductions and each individual with the amount being deducted
- **Timecard Edit:** will show employee timecard details (similar to the information on the Short Timecard Entry tab)



Separate timecards are calculated independently and then associated with any applicable time entries.



Once you get to this point in the payroll process, if all of your numbers are accurate, you are ready to start cutting checks.





## STEP 4: PRINT PAYCHECKS & TRANSFER DIRECT DEPOSITS

Once you have created your check batches and double-checked for accuracy, you will need to print checks and send the direct deposit information to the appropriate bank accounts.

### Create Paychecks/Direct Deposits/Registers

From this window, you can print checks, direct deposit stubs, and a register of the transactions.

Select the batch ID that you would like to print. In most cases, you will not need to change the check and direct deposit numbers, however, if you are in a situation where you want to start at a specific number, you can enter the check and deposit numbers.

The **Restart Checks/Direct Deposits?** checkbox is an option that will allow you to rerun the print process. You may need to use this if your printer did not properly print the checks or if you had a paper jam in the middle of your print.

Code	Batch ID#	Batch Description
	0	
RG	367	Separate Timecards Nov 2013
RG	293	Separate Timecard Dec 2013
MN	133	Manual Check 4.0
RG	291	Staff Timecards 12/31/2013
RG	489	Accrual Testing
RG	507	January 2014

Verify the check and direct deposit numbers to be used, enter a report title, and submit the selected check batch to be processed.

Next Check Number : PR 25925

Next Direct Deposit Number : DD 1214

Report Title :

Restart Checks/Direct Deposits? : ☐

OK Cancel Customize

When you click **OK**, you should also see a popup window letting you know that the process was completed successfully.

Jenzabar EX : 80015

Paychecks/Direct Deposits/Registers process is now complete.

OK

You will see several reports when the process completes:

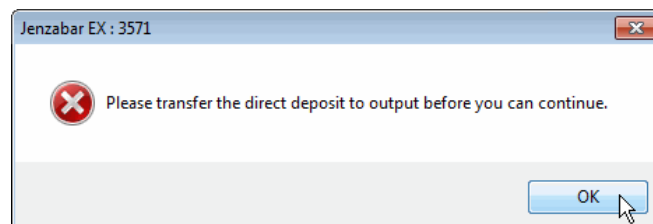
- **Individual Deductions Register:** breaks out deductions by group and then lists each deduction for each individual, and you will also be able to see the check/direct deposit numbers
- **Multiple Checks List:** will show any employees receiving more than one check for the pay period
- **Deduction Register:** will list the available deductions and each individual with the amount being deducted, and you will also see the general ledger account numbers and any project codes
- **Payroll Register:** this register you will get an overview of all information for your employees
- **Pay Check/Direct Deposit:** this report will list all of your checks and direct deposits is broken up into two tabs with printable checks or pay stubs and grand totals



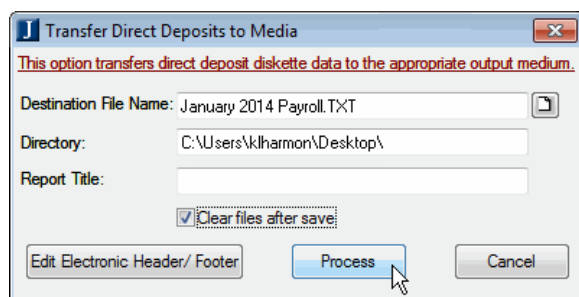
*Good record keeping: you should save these reports in a safe place in case of audits.*



If you receive the warning message shown on the right, it means that either you did not transfer your direct deposits or you did not clear the direct deposit files after saving them. You will need to go to the **Transfer Direct Deposit to Media** window and clear the saved files.



## Transfer Direct Deposit to Media



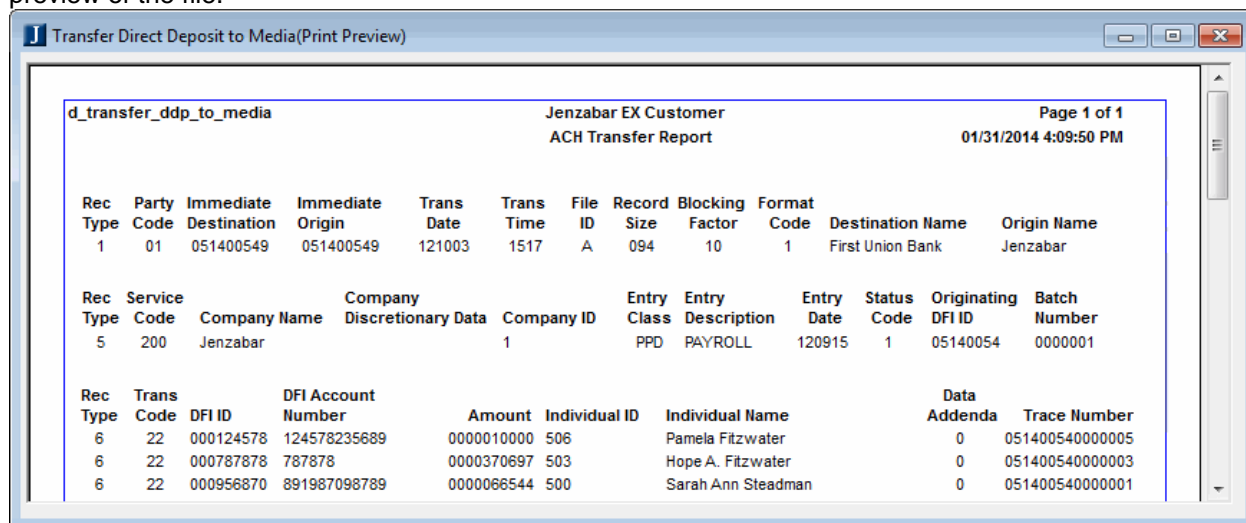
After you complete the Paychecks/Direct Deposits/Registers process, you will need to transfer your direct deposit information to a file. This file is what you will send to the bank so that the money will be transferred to your employee's accounts.

**The Clear files after save** checkbox will need to be selected to prevent the warning error on the **Paychecks/Direct Deposits/Registers** window. When you click this checkbox, all direct deposit information for the batch will be deleted from the system.



*You can save these files somewhere on your computer as a backup in case you need them for your bank records later.*

When you click **Process**, a .TXT file will be saved in the location you chose, and you will see a report preview of the file.



*The .TXT file that goes to the bank will not have the formatting and headings that the above report will have. Having a copy of this file can be beneficial to you when you need to lookup specific IDs or account numbers.*



## STEP 5: UPDATE PAYROLL

Once you have completed steps 1-4, you need to update your payroll in the EX system.

### Update Payroll

You will use this window to select a check batch that will be used to update payroll. The check batch is used to update year-to-date earnings, check history amounts, and to create journal entries for the Business Office application. Therefore, this process will send all monetary details to the general ledger and update all accrual information. Before you run Update Payroll, none of the accrual information for employees will update. As a result, the numbers on your general ledger accounts and accrual calculations will be incorrect.

When the process successfully completes, you will receive a report with all of your employees and payroll information itemized (or summarized if you chose the summarize option on the **Update Payroll** window).



During the Update Payroll process, the Check Date on the batch is used to determine the month, quarter, and year to which the amounts are added.



**You must run the Update Payroll process to complete the payroll processing. If you do not run Update Payroll, you will have major issues with your employee accruals, year-to-date totals, and general ledger accounts.**



*As a part of the update process, the pay run controls are automatically updated with the next available check and direct deposit numbers.*

### Errors

- If your system is integrated with the Development module, the payroll cannot be updated until Development has pulled in the gifting from the previous payroll run.
- If there are any errors in found in your payroll, you must fix them before the update process can be completed.



If the update process finds errors, you will see an error report that will help you locate the issues that need to be fixed.



## STEP 6: VOID CHECKS

On occasion, there may be an error in the payroll process or your employees may misplace/damage their initial paycheck and you will need to void their check.

### Checks to Void

From the **Checks to Void** window, you will select the check or checks you need to void. You can search for checks by the check number, employee ID number, or the check date. Once you have selected the checks you wish to void, click the **Process** button.

Check Type	Check Number	Check Date	ID Number	Name
PR	25915	01/31/2014	15	Brown, Clarence L.
DD	1190	01/31/2014	500	Steadman, Sarah Ann
DD	1189	01/31/2014	503	Fitzwater, Hope A.

You will need to enter a transaction date that will identify when the check was voided. Usually you will use the original check date; however, you may want to use the current date if you will be creating an adjusting report.

Click **OK** to void the check(s).

When you void a check, you will see all of your register reports with the negative amounts from the check(s) you voided.

Enter the transaction date to be used for reversing month-to-date, quarter-to-date, and Year-to-date

Transaction Date: 01/31/2014

You will also need to go back to the **Update Payroll** and run the process again to send the information back to the general ledger and update your year-to-date totals. Your original check would have been in a batch with a source code of RG, and the new check will be generated in a batch with a VD source code.



*If you accidentally voided a check but did not update payroll, go to the **Unused Check Batches** window and remove the batch before updating to cancel the void.*



## Chapter 6. USING APPLICANT TRACKING

In this chapter, you will follow the process of tracking potential employees through the application process using the CRM Staff portlet.

### OBJECTIVES

At the end of this chapter, you will be able to:

- Setup CRM Staff for Applicant Tracking
- Request a position
- Review position requests
- Use Formbuilder to create an application
- Process applicants
- Hire a new employee

### APPLICANT TRACKING PROCESS OVERVIEW

Applicant Tracking will take place internally and externally. Most of the process will be done internally; from requesting and positing a position to creating application forms and reviewing applicants. However, after posting a position, people (internal and external) can view and apply for the position.





## STEP 1: COMPLETE SETUP AND MAINTENANCE

When using Applicant Tracking, there are several setup steps you need to complete before beginning the process. The windows and steps below will get you started.

### Working in EX

EX and JICS work together to make Applicant Tracking possible. To complete the process, you will need to work in the following EX windows.

#### Creating an HR Administrator

Set up a position that is an HR Administrator. Go to the **Organization Positions** window and make sure that at least one position is designated as an *HR Hiring Administrator*. This typically will be only one position. This setting will assign employees in the position to the appropriate roles of the Position Request by default.

In addition to ensuring that a position is designated as an HR Hiring/Position Administrator you need to make sure there is an employee assigned to this position and the employee's position is active:



## Reviewing Position Requests

When you begin the process of hiring a new employee, you will first need to have an open position. You may start with an existing position or you may need to create a new position. You will need to review the **Organization Positions** window to ensure that the position you want exists in the system. In addition to looking at the existing positions, current employees can submit a request for new positions. When an existing employee requests a new position, use the **Review Position Requests** window.

The screenshot shows the 'Review Position Requests' window. It has a sidebar with a list of requests: 6 - JEP Tutor, 5 - Accountant (selected), 4 - HR Architect, 3 - Clerical Helper, 2 - Mechanic, and 1 - Teacher. The main area displays details for the selected request (5 - Accountant). It includes fields for Requisition#, Position Title, Position Code, Position Description, Position Request Process, Status, Change Date, Hiring Process, Status, Change Date, Proposed Start Date, Posting Date, Closing Date, Documents to Include (Cover Letter?, Resume?, References?, Additional Documents?), Requested by, Requestor ID#, On, Reports to, and VP Finance. Below this, there is a section for 'Inactive Requests' showing request 8 - Housekeeper with similar details.

There are several icons on the window of which you should be aware:

	Click the icon to add a comment or attach a file.
	This icon indicates that there is one or more comments attached to the position. You can click the icon to view existing comments or respond to a comment.
	Selecting this icon will open the <b>Manage Hiring Officers</b> window, and allow you to assign a Hiring Manager to the position.
	Click this icon to attach the requisition to an existing organization position from the <b>Select Position Code</b> window.
	You would click this icon to open the <b>Organization Positions</b> window and create a new position for the requisition.

The system will automatically create a requisition number for each position request submitted (*not to be confused with purchasing requisition numbers*). Once a request is submitted, you will be able to approve or deny the request as needed from the Status drop-down box (see Position Request Process Statuses).

On the **Review Position Requests** window, you will see an Event Log icon next to the status fields. When you click this icon, a window will open and display all activity changes for the status.

The screenshot shows the 'HR Position Requisitions - Event Log' window. It displays a table with the following data:

HR Position Requisitions Event	Event Changed By	Event Change Date	Description
HR Position Requisitions-Submitted	Marcia J Engle	10/04/2013 09:15:08 AM	Status Change
HR Position Requisitions-Withdrawn	Marcia J Engle	10/04/2013 09:10:50 AM	Status Change
HR Position Requisitions-Submitted	Marcia J Engle	09/20/2013 01:38:30 PM	Status Change

There is a 'Close' button at the bottom of the window.

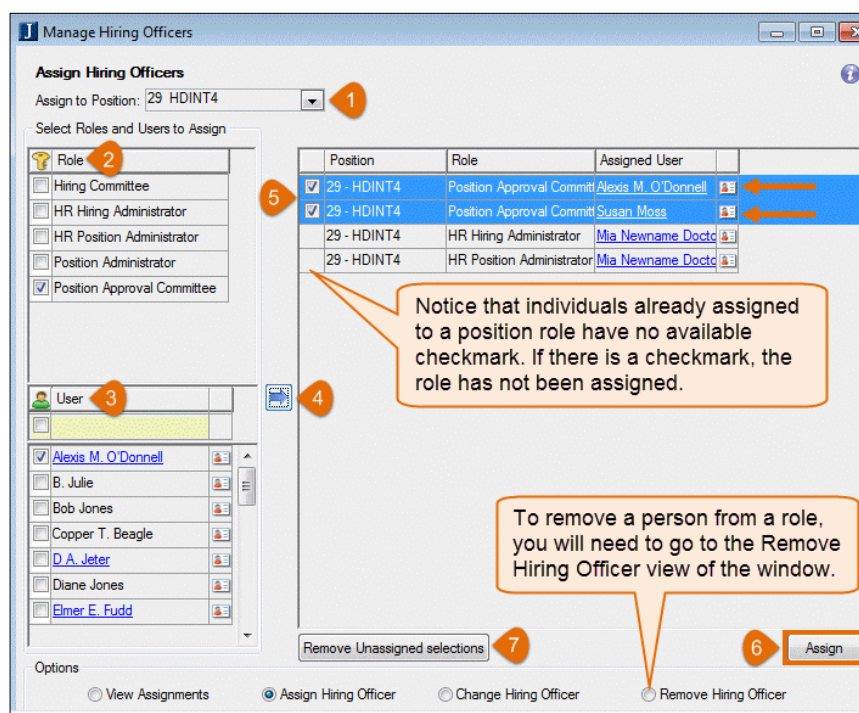









## Managing Hiring Officers

From this window, you will assign, review, update, and remove hiring officers from positions and roles. Each hiring officer role can have multiple users assigned to them, and an individual can belong to multiple roles, but the roles must be assigned to each position individually. Each position also must be assigned at least one hiring officer.

- 1 Select a position
- 2 Choose which role you want to assign
- 3 Select users for the position
- 4 Click the  icon to move users into the role
- 5 Select the checkboxes of the users you want to assign
- 6 Click the **Assign** button
- 7 If you did not want to assign an individual you moved over click the **Remove Unassigned selections**



The illustration below provides a visual representation of the tasks that might be performed by each role maintained on the **Hiring Officers** window:

 <b>HR Hiring Administrator</b>	 <b>HR Position Administrator</b>	 <b>Position Administrator</b>	 <b>Position Approval Committee</b>	 <b>Hiring Committee</b>
<ul style="list-style-type: none"> <li>Prepares, posts, and closes requested positions</li> <li>Assigns Hiring Committee members</li> <li>Reviews initial applications</li> <li>Approves interviews and removes applicants from consideration</li> <li>Offers a position to an applicant</li> <li>Handles acceptance and rejection letters</li> <li>Ends the position hiring process</li> </ul>	<ul style="list-style-type: none"> <li>Requests, reviews, and withdraws requested positions</li> <li>Approves or denies a newly requested position</li> <li>Assigns hiring officers to the Position Approval and Hiring Committees</li> <li>Offers a position to an applicant</li> <li>Ends the position hiring process</li> <li><i>(this role will usually be held by a Human Resources employee)</i></li> </ul>	<ul style="list-style-type: none"> <li>Requests, reviews, and withdraws requested positions</li> <li>Approves or denies a newly requested position</li> <li>Assigns individuals to the Position Approval Committee</li> <li>Handles rejected offers from applicants</li> <li>Removes applicants from consideration</li> </ul>	<ul style="list-style-type: none"> <li>Reviews positions</li> <li>Approves or denies submitted position requests</li> </ul>	<ul style="list-style-type: none"> <li>Assists in the evaluation of the applicants</li> <li>Approves or denies applicants for consideration</li> <li><i>(this role can be comprised of people across campus or within a specific department)</i></li> </ul>





## Position Request Process Statuses

The Hiring officers will play different roles in the position request and hiring processes. Depending upon the role, hiring officers can submit or approve position requests, participate in the hiring process for a specific position, and receive notifications about the current status of the process. To better understand the statuses involved with the Position Request Process, see the table below:

	Submitted	Accepted	In Progress	Approved	Withdrawn
Who?	Users with the authority to submit position requests and access to JICS and/or the EX window (ex. HR Position Admin or Position Admin)	HR Position Admin and/or Position Admin	HR Position Admin	HR Position Admin and/or Position Admin	HR Position Admin and/or Position Admin
How?	Using the <b>Employment Position Management, Request New Position</b> link, or the <b>EX Review Position Requests</b> window a position request is submitted	Using the <b>EX Review Position Requests</b> window, someone from HR (or with the proper authority) reviews and accepts the position request (Committee members can be assigned using the <b>EX Manage Hiring Officers</b> window)	HR (or with the proper authority) has assigned a Position Approval Committee and possibly a Hiring Committee so now the position request can be reviewed by the Position Approval Committee and the status can be updated using the <b>EX Review Position Requests</b> window	Using the <b>EX Review Position Requests</b> window	Using the <b>EX Review Position Requests</b> window
Outcome?	The position request can be seen in <b>Employment Position Management</b> by the HR Position Admin or Position Admin	The position request is accepted and the position can be seen in <b>Employment Position Management</b> by the HR Position Admin, Position Admin, and the Position Approval Committee	The position request is being processed and can be seen in <b>Employment Position Management</b> by the HR Position Admin, Position Admin, Position Approval Committee (committee events commence), and may also be viewed by the individual requesting the position under <b>View you recent position requests?</b>	Position request is approved or denied and can be seen in <b>Employment Position Management</b> by the HR Hiring Admin and Position Admin but is no longer available to the HR Position Admin or Position Approval Committee; the position will not be available to the Hiring Committee until applications are submitted (if approved) and the Position Hiring Events begin	The position request is withdrawn and can be seen in <b>Employment Position Management</b> by the HR Position Admin and Position Admin but is no longer available to the Position Approval Committee
Notified?	HR Position Admin and/or Position Admin	None	Position Approval Committee	HR Position Admin, Position Admin, and/or Position Approval Committee	HR Position Admin, Position Admin, and/or Position Approval Committee
Why?	Notified to allow HR to review the request before releasing it for review by others (this is a time saver if there is a hiring freeze)	No one would be notified so that HR would have time to setup committee assignments (if needed)	The committee would be notified to allow the administrators to see the position request (no one from the hiring perspective would be involved at this point since the position has not yet been approved)	This is not an automatic process since even if each committee member approves the position, it still may need to be approved or denied by an admin	This is not an automatic process



## Working in JICS

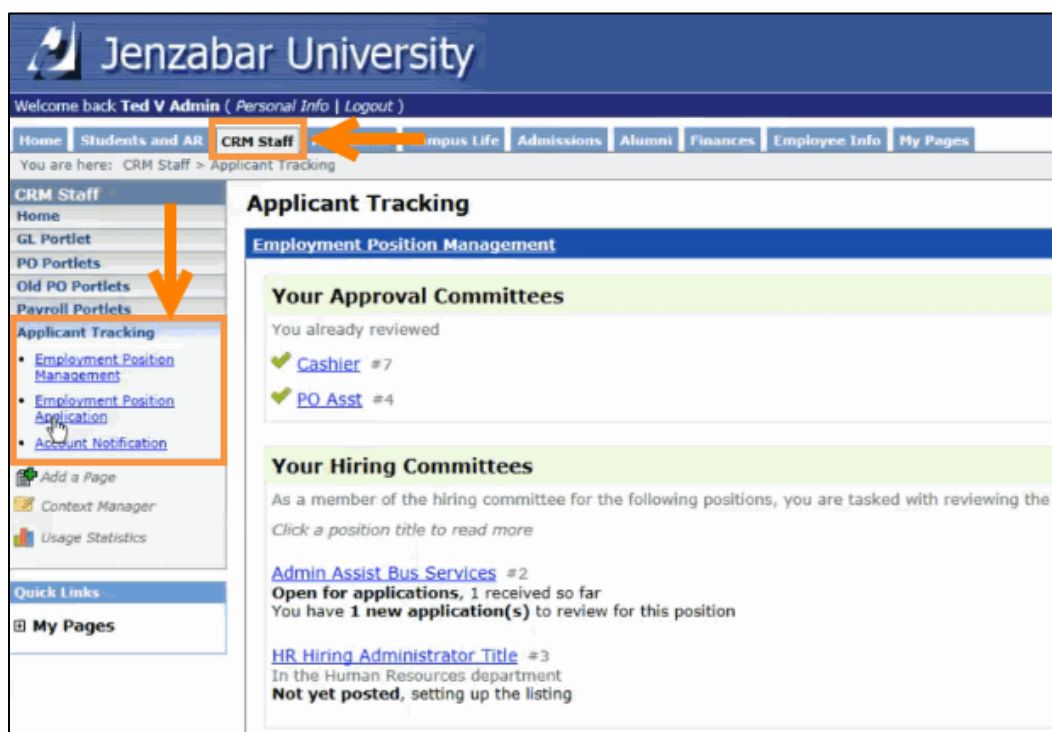
EX and JICS work together to make Applicant Tracking possible. To complete the process, you will need to work in the following windows of the JICS portal.

### CRM Staff

Within the JICS product, you can use the CRM Staff portlet to follow and work with Applicant Tracking. Once logged into your JICS website, you will need to move to your CRM Staff portlet and find the Applicant Tracking.

There are three portlets within Applicant Tracking:

- **Employment Position Management** – this internal page is where your current employees can go to request a new position
- **Employment Position Application** – this public page is where internal and external individuals will go to apply for an open position
- **Account Notification** – this administrative page is where your school will setup how notifications are sent



Your screens will not look the same as the images in this document. The setup of your website and portals will vary depending on the site design for your school and your permissions. In addition, the name and location of your portals/pages will vary.



## Employment Position Management

The Employment Position Management portal is where an employee can request a new position listing, view their membership in the Approval and Hiring Committees, and review positions assigned to them.

**Applicant Tracking** [Edit page](#) [Printer Friendly](#)

**Employment Position Management**

**Your Approval Committees**  
You already reviewed  
✓ [Cashier](#) #7  
✓ [PO Asst](#) #4

**Your Hiring Committees**  
As a member of the hiring committee for the following positions, you are tasked with reviewing the submitted applications and helping decide who to bring in for interview.  
Click a position title to read more  
[Admin Assist Bus Services](#) #2  
Open for applications, 1 received so far  
You have 1 new application(s) to review for this position  
[HR Hiring Administrator Title](#) #3  
In the Human Resources department  
Not yet posted, setting up the listing

**Positions You Can Review**  
You can review any position requests that you have been assigned as a position or hiring administrator.  
Click a position title to read more  
[Admin Assist Bus Services](#) #2  
✓ Approved by HR on 1/7/2013  
✓ Approved by Approval Committee on 1/7/2013  
👤 Hiring now

**Callouts:**

- Request a new position listing (points to [new position listing](#))
- Any notes or actions the user needs to see or complete will be listed here (points to the Hiring Committees section)
- The information on this page will change, depending on who is logged into the portal (points to the entire page content)

## Employment Position Application

The Employment Position Application portal is where your potential applicants can search all available positions at your school, review their applications, and submit questions about a specific position.

**Applicant Tracking** [Edit page](#) [Printer Friendly](#)

**Employment Position Application**

As an employment administrator, you can [configure some settings](#)

Here is where you can introduce your school to an applicant. This is located in the 'Employment Position Application' Portlet. An organization is only as good as its employees.....

**Callouts:**

- People search for a specific job by entering criteria, or search all jobs by leaving the criteria blank (points to the search input fields)
- This top section of text (and the image) can be customized by clicking the [configure some settings](#) link (points to the top section)
- Your search results will appear at the bottom of the window (points to the Search Results table)

**Search Results**

Position	Department	Classification	Type	Posted
<a href="#">Admin Assist Bus Services</a>			Full Time	01/05/2013



You can select any of the positions in the Search Results for more information about the job listing.

**Applicant Tracking**

**Employment Position Application**

**Admin Assist Bus Services**  
Posted on 1/5/2013  
Accepting applications until 7/16/2014

**About this position**  
Here is where you can write up some more information about the position that you want applicants to see. This is in the Edit Listing area on CRM Staff.. This is in the Employment Application Portlet.

**About our ideal candidate**  
Here is where you can write something about a candidate's qualifications. It is also in the Employment Position Application Portlet

**About us**  
**About Us Text** : Here you put in a brief story about your school. This is Optional. You will find this under the Configuration Settings on CRM Staff. You can also change up the **Font**, you might want to tell what your school was founded. The **'American Dream'** means many things, yet in essence it remains just as it was defined by our founding fathers.....

You applied for this position on 1/8/2013  
Your application is being reviewed

[View your application](#)

[Ask us a question](#) about this listing

[Back to job listing](#)

**Job type**  
Full Time

**Location**

**Department**

**Salary**  
\$30,000.00 per year

**You applied for this position**  
See below for details

[Have a question?](#)  
[E-mail us](#)

[Back to job listing](#)

## Role Permissions

You will need to setup role permissions for the portlets and add them to an existing page or create a new tab.

- 1 Log into JICS as an administrator
- 2 Go to Site Manager → Global Portlet Operations
- 3 Scroll down to the **Employment Position Management** link and click on it
- 4 The **Global Operations** window will appear

Custom Content

Data Import Transactions

Degree Audit Portlet

Division and Major Assignment Portlet

Employee Information

Employment Position Application

**Employment Position Management**

Ethnicity and Race Portlet

EX Web Link

Facility Schedules

Faculty Course Control

Faculty Links

Global Operations for: Employment Position Management				
Permissions for: Global User Roles				
Role	Operations:			
	Allow Access	Can Administer Portlet	Can Map Data for Employment Applications	Can Submit Position Requests
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Admissions Administrators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admissions Counselors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admissions Officers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advancement Officers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advisor Administrators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advisors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Athletes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Candidates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Constituents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Donors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- **Allow Access:** when selected, individuals with this permission will be able to see the page
- **Can Administer Portlet:** this option gives individuals administrative rights to the page
- **Can Map Data for Employment Management Application:** this option will give individuals permission to create and map information for application forms in FormBuilder
- **Can Submit Position Requests:** if selected, this checkbox will give individuals permission request a position from the Employment Position Management page



Permissions for: Global User Roles		
Role	Operations:	
	Allow Access	Can Admin Global Settings
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Admissions Administrators	<input type="checkbox"/>	<input type="checkbox"/>
Admissions Counselors	<input type="checkbox"/>	<input type="checkbox"/>
Admissions Officers	<input type="checkbox"/>	<input type="checkbox"/>
Advancement Officers	<input type="checkbox"/>	<input type="checkbox"/>
Advisor Administrators	<input type="checkbox"/>	<input type="checkbox"/>
Advisors	<input type="checkbox"/>	<input type="checkbox"/>
Athletes	<input type="checkbox"/>	<input type="checkbox"/>
Candidates	<input type="checkbox"/>	<input type="checkbox"/>
Constituents	<input type="checkbox"/>	<input type="checkbox"/>
Donors	<input type="checkbox"/>	<input type="checkbox"/>
Employment Applicant	<input type="checkbox"/>	<input type="checkbox"/>
Everyone	<input checked="" type="checkbox"/>	<input type="checkbox"/>
External Authentication	<input type="checkbox"/>	<input type="checkbox"/>
Faculty	<input type="checkbox"/>	<input type="checkbox"/>
Financial Aid Administrators	<input type="checkbox"/>	<input type="checkbox"/>
Guests	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Parent	<input type="checkbox"/>	<input type="checkbox"/>
Parents	<input type="checkbox"/>	<input type="checkbox"/>
Staff	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Staff Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Student	<input type="checkbox"/>	<input type="checkbox"/>
Student Administrators	<input type="checkbox"/>	<input type="checkbox"/>
Students	<input type="checkbox"/>	<input type="checkbox"/>
Teacher Assistant	<input type="checkbox"/>	<input type="checkbox"/>
Users	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- 5 Select the proper operations for each role and save
- 6 Do the same for the **Employment Position Application** portlet



You may want to hold off making this portlet available to Everyone or Guests until you are up and running; however, you will want to make it available to the Staff Admin Role so you can run tests.



The permissions on the left have configured who will be able to access the portlets and what they can do in each portlet.

## Creating Pages for Applicant Tracking

Once you have the correct permissions, you can build pages by adding portlets. If you want the Applicant Tracking to be visible, you will need to add the Employment Position Management and Employment Position Application portlets to the page.

- 1 Go to the empty page and click on **Edit Page**

You are here: Employment App and Mgmt > Default Page

### Employment App and Mgmt

**Default Page**

Add a Page

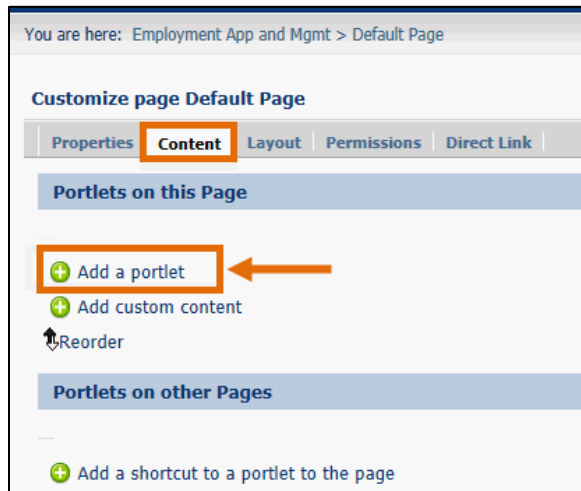
Context Manager

Usage Statistics

**Quick Links**

## Employment App and Mgmt

[Edit page](#) [Printer Friendly](#)



2 Click the **Content** tab and **Add a portlet**



3 Scroll down to **Pages for Staff** if that is a role you gave access to the portlets

4 Click on each one to add it to the page

5 Exit and the log out of Administrator



## Notifications

The notification features will provide updates about where in the process a specific position may be and send the details to individuals signed up to receive the notifications.



All notifications must be sent from EX (Notepad) there is currently no process in JICS.

### EX Notifications

To setup notifications you will need to look at two places in EX: Internet Submissions and HR Configure Human Resources via Payroll/Personnel.

### Internet Submissions

- 1 Scroll down the **Internet Submissions** window until you find *Employment Application*
- 2 Highlight the row and click on **Assign Processing Notification Rights**

Internet Submissions

Listed below are all the internet submissions that can be submitted from JICS.

Submission Type	Submission Source	Show Related Tabs
Admission Application	Apply for Admission Portlet	<input type="checkbox"/>
Admission Application - Third Party	Apply for Admission Portlet	<input type="checkbox"/>
Personal Info Update	Course Schedules	<input checked="" type="checkbox"/>
Registration Agreement	Course Schedules	<input type="checkbox"/>
Employment Application	Employment Application Portlet	<input type="checkbox"/>
Housing Survey	Housing Survey Portlet	<input type="checkbox"/>
JRM Update	Jenzabar Recruitment Manager Integration	<input checked="" type="checkbox"/>
Admissions Application - New	JICS - Apply for Admissions portlet in Candidate 2.0	<input checked="" type="checkbox"/>
Admissions Inquiry - New	JICS - Make an Inquiry portlet in Candidate 2.0	<input checked="" type="checkbox"/>

**Assign Processing and Notification Rights** Review Mapping Details

[Personal Information/General Update Priority](#)

- 3 On the **Assign Processing and Notifications Rights** window, right-click to add or delete rows as needed
- 4 Select the checkboxes to assign processing rights and notifications for each group

Assign Processing and Notification Rights

Assign the groups below that should have rights to process and who should be notified when the selected submissions are submitted by a JICS user.

Submission Type: Employment Application

Groups	Can Process	Must Notify
	<input type="checkbox"/>	<input type="checkbox"/>
RDS_GRP Bob Smead	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
JEX_HRMANAGER Human Resource Module Mgrs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
JEX_HRUSER Human Resource Module Users	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Save Cancel

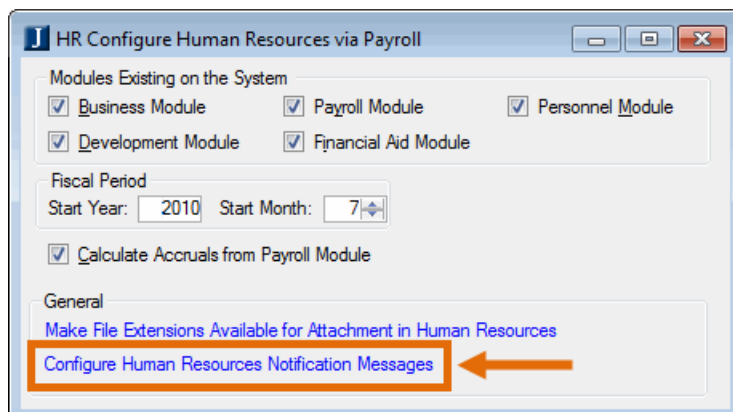


The users in the above groups will receive a notification when someone submits an application. The user would then process that application via the Process Internet Submissions window.

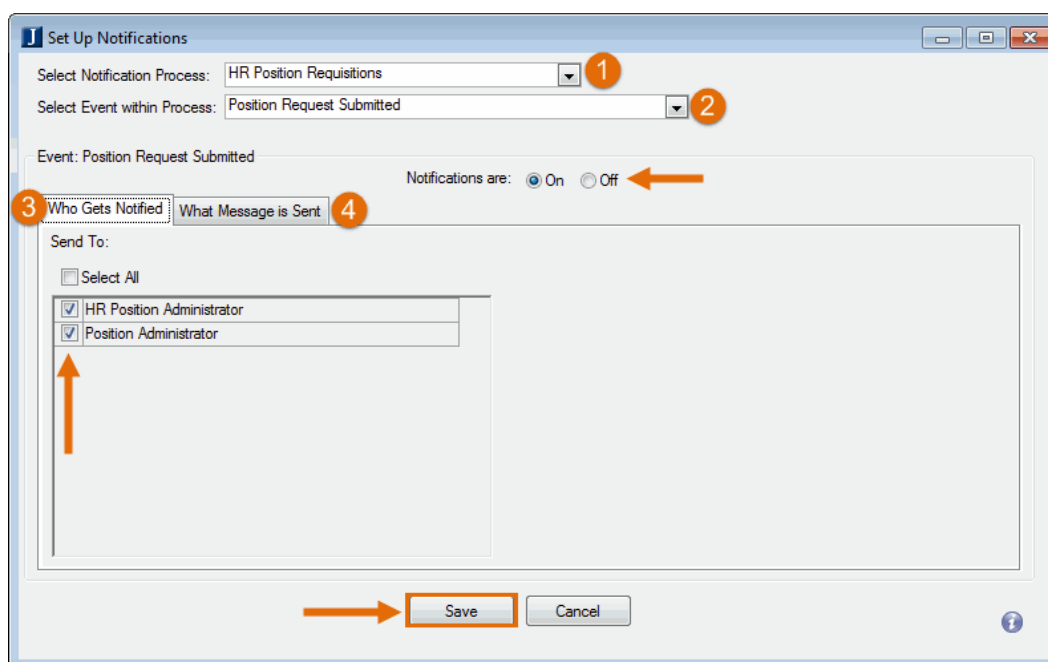


## HR Configure Human Resources

- 1 Click on **Configure Human Resources Notification Messages**



- 2 There are many options available from the **Set Up Notifications** window



1

Select one of the five notification processes:





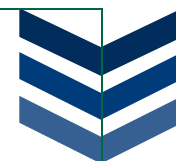


2 Each process has multiple event options, select one:

3 Select the checkboxes for any role(s) you want to receive notifications

4 Choose which role(s) to notify for each specific action. Then you can configure what message is sent by inserting placeholder tags:

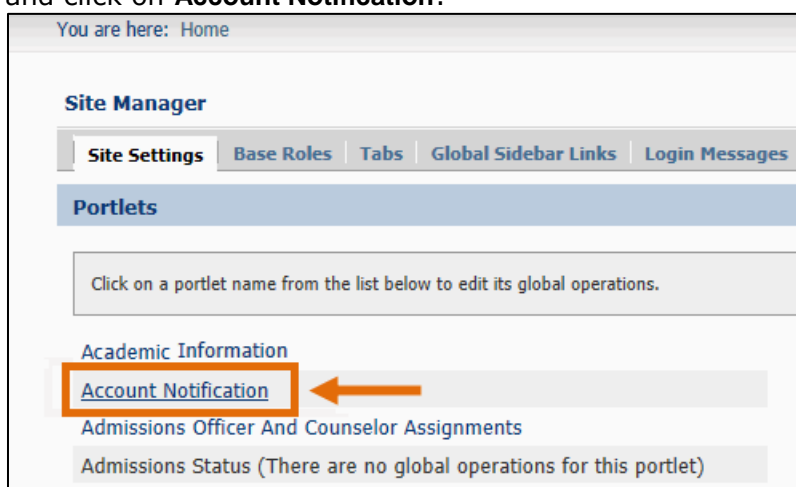
If you do not put an email address in the From field, it will send it from the email address specified in the **Maintain Config Table**



## JICS Notifications

To setup account notifications, you will also need to check settings within JICS so that the user who submits their application will receive an automatic notification once it has been processed by HR via the **Process Internet Submissions** window.

- 1 Log into JICS as an administrator. Go to Site Manager → Global Portlet Operations and click on **Account Notification**:




- 2 On the Employment Applicant row, click the **Can Receive Account Notification** box
- 3 Also, click the **Allow Access** box for the role(s), such as Staff Administrator, that you want to be able to modify the Notification.

Permissions for: Global User Roles		
Role	Operations:	
	Allow Access	Can Receive Account Notification
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Admissions Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Admissions Counselors	<input type="checkbox"/>	<input type="checkbox"/>
Admissions Officers	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Advancement Officers	<input type="checkbox"/>	<input type="checkbox"/>
Advisor Administrators	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Advisors	<input type="checkbox"/>	<input type="checkbox"/>
Athletes	<input type="checkbox"/>	<input type="checkbox"/>
Candidates	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Constituents	<input type="checkbox"/>	<input type="checkbox"/>
Donors	<input type="checkbox"/>	<input type="checkbox"/>
Employment Applicant	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Everyone	<input type="checkbox"/>	<input type="checkbox"/>
External Authentication	<input type="checkbox"/>	<input type="checkbox"/>



- 4 Next go to the **Account Notification** portlet

- 5 Click on **Setup** and select the  icon to create a new e-mail template for your account notifications

- 6 Complete the fields and click **Save**

- 7 Back on the **Account Notification – Setup** page, select the new template from the drop-down list

- 8 Click **Save** to apply the new template



## STEP 2: REQUEST A POSITION

There are two ways to submit a position request. Via the **Employment Position Management** Portlet in JICS or via the **Review Position Requests** window in EX.

### Request a Position in JICS

- 1 Log into JICS as a person who is in a roll that was provided access to **Can Submit Position Requests**

Global Operations for: Employment Position Management				
Permissions for: Global User Roles				
Role	Operations:			
	Allow Access	Can Administer Portlet	Can Map Data for Employment Applications	Can Submit Position Requests
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Admissions Administrators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admissions Counselors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admissions Officers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advancement Officers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advisor Administrators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advisors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Athletes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Candidates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Constituents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Donors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employment Applicant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Everyone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
External Authentication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Faculty	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial Aid Administrators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Guests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Staff Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Student	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student Administrators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 2 From the Employment Position Management portal, click **new position listing**

Have an opening?

If you have a position that needs to be filled, you can request [new position listing](#)

[View your recent position requests](#)



- 3 You can search for an existing position or create a new one if it is a brand new position for your school

**Employment Position Management**

**Request a new position listing**  
Use this screen to request a listing to fill an open position

**Search for a position**  
Use any of the fields below to find the position you need to fill and make your request.

Position title (some or all)

Keywords (Description, category, etc)

Department:  Classification:

☐ Reports to me

**All-new position?**  
Not able to find a matching position? If your open position has never existed before, you can use the link below to request a new position.  
[Request an all-new position](#)



*If you need to hire another professor that would probably be an existing position that you could find in a search.*

- 4 When you create a new position, you will need to complete the fields to the best of your ability
- 5 Once you have completed the form, click **Request this listing** to submit your position request

**Employment Position Management**

**Request a new position listing**  
Use this screen to request a listing to fill an open position

**Create a new position** Or search for an existing position  
This information is used to define your new position in the HR system.  
It will need to be approved by a reviewer before becoming official.

Position title:

Short description:

Location:

Categorization:

Optional:

Work Type:

How much work?

Pay Type:  \$  per hour

Competencies: Required

Desired

Documents: For internal use about this position

New Hire Start Date:

Justification for This Request

Special instructions for HR

[search for an existing position](#)



## Request a Position in EX

- 1 Go to the **Review Position Requests** window
- 2 Right-click and choose **Add Row**

The screenshot shows the 'Review Position Requests' window. On the left, a list of requests is shown with '29 - HDINT4' selected. The main area displays details for this request, including Requisition#, Position Title, Position Code, Position Description, Position Request Process, Hiring Process, Proposed Start Date, Posting Date, Closing Date, and Documents to Include. A right-click context menu is open over the 'Add Row' button, showing options: 'Add Row' (Ctrl+Shift+A), 'Delete Row' (Ctrl+Shift+D), 'Insert Row' (Ctrl+Shift+I), and 'ELITE PAINT'.

- 3 Click the **Create New Position** button or **Choose Existing Position** button

The screenshot shows the 'Review Position Requests' window. The 'Add Row' button is highlighted with a red box and an orange arrow. The main area displays details for the request, including Requisition#, Position Title, Position Code, Position Description, Position Request Process, Hiring Process, Proposed Start Date, Posting Date, Closing Date, and Documents to Include. The 'Create New Position' button is highlighted with a red box and an orange arrow.

- 4 Complete the fields to the best of your ability
- 5 Save the request

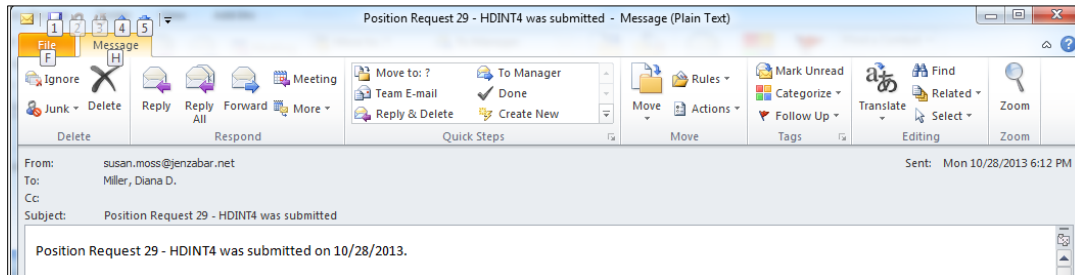


## STEP 3: REVIEW AND CREATE A POSITION

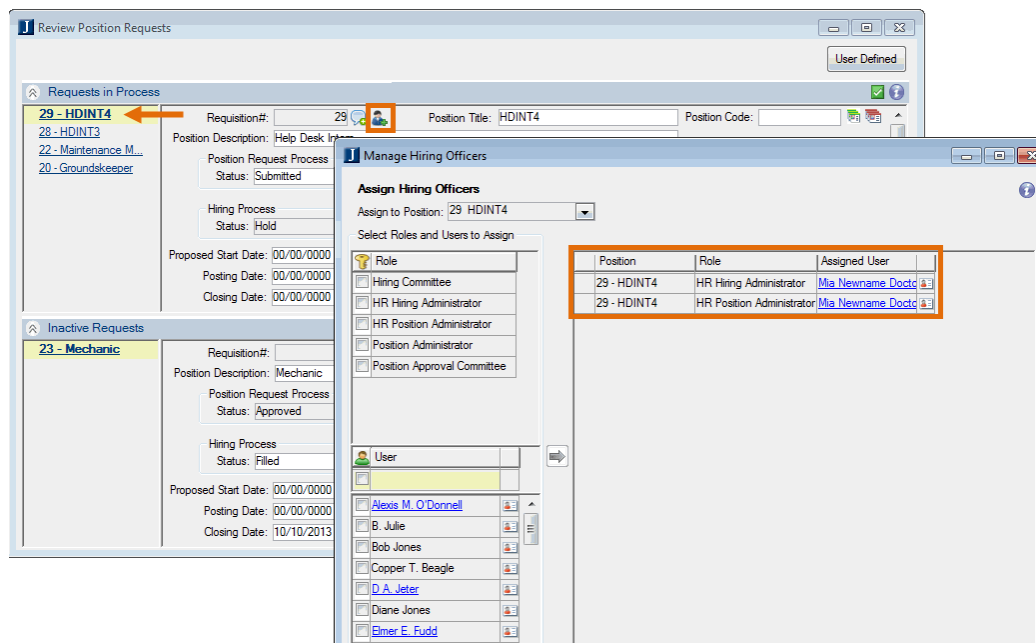
Once you have requests for new or existing positions, you will need to setup a system to approve or deny the requests.

### Process the Position Request

As the HR Hiring Administrator, you will receive a notification that a position request has been submitted.



This email notification alerts you to go to the **Review Position Requests** window for the position requested and click on the Manage Hiring Officers icon.



You will see that by default, the employee setup as the HR Hiring Administrator and HR Position Administrator will be automatically put in to those roles for all position requests.

Depending on your organization's hiring procedures, what you do next will vary:

- If the position request will go through a position approval process, you will want to assign people to the Position Approval Committee.
- If you are not using an approval process, you can move straight to the hiring process and skip the Position Approval Committee and change the Position Request Status from Submitted to Approved.



## Assigning Hiring Officers

While the HR Hiring Administrator and the HR Position Administrator should be assigned automatically (these will pull from the Organization Positions window), if they are not, or if you would like to add another person, you can do so at this time.

Save and close the Manage Hiring Officers window.

Back on the **Review Position Requests** window, change the Position Request Status to **Accepted**. You will see a warning to assign Position Approval Committee members.

Position	Role	Assigned User
29 - HDINT4	HR Hiring Administrator	Mia Newname Docto
29 - HDINT4	HR Position Administrator	Mia Newname Docto

If necessary, be sure to assign any Position Approval officers.

OK



In order for the Position Approval Committee to see the request, the Position Request Process status must be set to Accepted.



*The Accepted status does not mean the position has been approved. You would use Accepted for situations where the position must go through a separate approval process before the hiring process can begin.*





## Approving/Denying - Position Approval Committee

Once you have assigned your administrators, select the people you would like to be on the Position Approval Committee for this position.

At this point, the Approval Committee will need to approve or deny the position request from the Employment Position Management portal in CRM Staff.

- 1 Log into JICS as a person who is on the Approval Committee

**Employment Position Management**

**Your Approval Committees**

You have **1 new position requests** to review

HDINT4 #29, a new position in the Technology department

- 2 Click on the link for the position request to carefully review the position information

Request for a new  
**HDINT4 #29**

**Susan Moss** requested this position on October 28, 2013  
 E-mail Susan

This would be an **all-new position**. Please review everything carefully.

This opening  
Susan suggests a target rate for this hire of **\$ 20.00** per hour  
Susan would like the new hire to start **as soon as possible**

Justification for This Request  
Need another help desk intern.

Special instructions for HR

Discussion about this request

No Comments/Attachments

[Add a comment](#) [Add a file](#)

Committee approval so far  
 **0** approve to **0** deny with **2** undecided  
[View individual votes](#)

Your decision about this request

[Add my approval](#) [Reject this request](#) [No decision yet](#) [Submit your vote](#)

A request is not approved until everyone on the committee has added their approval. However, a single rejection will officially reject the request.

- 3 Once you have reviewed the details of the position, you can click the Add my approval or Reject this request button



## Assigning a Hiring Committee

- 1 Once all members of the position approval committee have approved the position request in JICS, go back to the **Review Position Requests** window and set the status to **Approved**

The screenshot shows the 'Review Position Requests' window. The 'Requests in Process' tab is active, showing a list of requests. The selected request is '29 - HDINT4'. The 'Status' is set to 'Approved'. A dialog box is displayed with the message: 'If necessary, be sure to assign any Hiring Committee officers.'

- 2 Next, assign Hiring Committee members on the **Manage Hiring Officers** window

The screenshot shows the 'Manage Hiring Officers' window. The 'Assign Hiring Officers' section is active. The 'Assign to Position' dropdown is set to '29 - HDINT4'. The 'Select Roles and Users to Assign' section shows a list of roles and users. The 'Assigned User' column shows the assigned users for each role.

Position	Role	Assigned User
29 - HDINT4	Hiring Committee	D. A. Jeter
29 - HDINT4	Hiring Committee	Alexis M. O'Donnell
29 - HDINT4	HR Hiring Administrator	Mia Newname Docto
29 - HDINT4	HR Position Administrator	Mia Newname Docto
29 - HDINT4	Position Approval Commit	Alexis M. O'Donnell
29 - HDINT4	Position Approval Commit	Susan Moss



- 3 Set Hiring Process Status to **Posted** so the Hiring Committee members will be able to see the position and applicants online

Review Position Requests

Requests in Process

29 - HDINT4  
28 - HDINT3  
22 - Maintenance M...  
20 - Groundskeeper

Requisition#: 29 Position Title: HDINT4 Position Code: [ ]

Position Description: Help Desk Intern

Position Request Process Status: Approved Change Date: 10/28/2013

Hiring Process Status: **Posted** Change Date: 10/28/2013

Proposed Start Date: 00/00/0000 Posting Date: 00/00/0000 Closing Date: 00/00/0000

Documents to Include  
☐ Cover Letter? ☐ Resume?  
☐ References? ☐ Additional Documents?

Requested by: Requestor ID#: 165  
Ms Susan Moss  
On: 10/28/2013

Reports to: [ ]

- 4 Log into JICS as a member of the hiring committee

From here, you will be able to view the position details and any applications

Employment Position Management

**Your Hiring Committees**

As a member of the hiring committee for the following positions, you are tasked with reviewing the submitted applications and helping decide who to bring in for an interview.

*Click a position title to read more*

**Maintenance Manager - All Facilities #22**  
In the Maintenance department  
**Open for applications, 1 received so far**  
You have **0 new application(s)** to review for this position

**HDINT4 #29**  
In the Technology department  
**Open for applications, 0 received so far**  
You have **no new applications to review**



## STEP 4: BUILD APPLICATION FORMS IN FORMBUILDER

After you have a position created and you are ready for people to apply, you need to create an application form using Formbuilder.

- 1 To setup the application form, an HR administrator will go online and under **Positions you can review** and click on the position request

**Positions You Can Review**

You can review any position requests that you have been assigned as a position or hiring administrator.

*Click a position title to read more*

**Maintenance Manager - All Facilities #22**  
✓ Approved by HR on 10/25/2013  
✓ Approved by Approval Committee on 10/25/2013  
Hiring now

**HDINT4 #29** ←  
✓ Approved by HR on 10/28/2013  
✓ Approved by Approval Committee on 10/28/2013  
Hiring now

- 2 Here you can **Preview the listing**, **Edit the listing**, and **Edit the application**
- 3 Click **Edit the application** (this is the necessary piece for the application it to appear online)

**Employment Position Management**

**HDINT4 #29**  
This position is **open** for applications. To date **0 application(s)** have been submitted.

Preview  
Preview the listing

Position Listing  
Edit the listing

**Application Form**  
Edit the application

Hiring Committee  
View the 3 member(s)

Applications for this position

There are three basic elements (name, email, and address) that will appear on every application. If you do not want to ask for more than the basic information, you can click **Save**, and the application will be visible online; however, most of the time, you will want to build a more comprehensive application.



- Click **Manage the rest of this application** to begin customizing the application form for the position

**Employment Position Management**

HDINT4 #29 Back to job listing

**The application form**  
Use this screen to customize the application for this portlet

The basics  
Every application asks for certain basic personal information. You do not need to build these fields into your application form, as they will be included automatically.

- First name, last name, middle initial
- E-mail address and phone number
- Current and Legal/Home/Permanent addresses

You can also choose to ask for the following application supplements. They can be provided by applicants as a file they upload, or a plain text field they type (or paste) into.

☐ Cover Letter ☐ Resume ☐ References ☐ Additional Supporting Documents Save

The rest  
If you want to ask anything else in your application (and you probably do!) you can use the Form Builder to build out whatever other questions you want to ask.

**Manage the rest of this application**

## Customizing Your Application

When building an application you will create sections and questions that will ask your applicants for information that will help you determine if the applicant is a good candidate for the position.



The steps below show an example of how you could build your application. When customizing your own form, the sections and questions will be different.

- Click **Add a Section** to create a section for character references

**Employment Position Management**

**Form Builder: Employment Application for Maintenance Manager - All Facilities (22)**

**Form Settings:**  
Edit basic form settings  
Set up payment options  
Set up completion messages

**Notifications:**  
Your database mapping has not been validated. Please validate it with the link below before using the form.

Done Preview this form Validate Mapping

**Sections** Jump to Other Content

Import Section(s) **Add a Section** Reorder Sections

**Section 1: Personal Information**

Import question(s) Add a Header Add a new Question Edit this section Delete this section

Move & reorder questions

	Question	Question Type	Req	Db Mapping
1	LastName	Text Field	<input type="checkbox"/>	<input checked="" type="checkbox"/> Mapped
2	FirstName	Text Field	<input type="checkbox"/>	<input checked="" type="checkbox"/> Mapped

- ## Employment Position Management

---

**Form Builder: Employment Application for HDINT4 (29)**

Employment Position Detail > Form Builder Main screen > Add a Section

### Add a Section

Section Name:

**Section Description/Instructions**

Image File:  Browse...

Image Placement:

  - ☒ Within the text, to the left
  - ☐ Above the text, centered

Text:

Default Font Size ABC **B** *I* U A - BG P Bulleted Numbered Indented List Link Unlink Image Smiley New Line

Normal HTML

[Save](#) [Cancel](#)

3 Click **Add a new Question**

*EX Human Resources Learning Guide*



- 4 You have four question types to choose from, for this example, select **Text Field**

**Employment Position Management**

**Form Builder: Employment Application for HDINT4 (29)**

Employment Position Detail > Form Builder Main screen > Add a Question

**Choose a Question Type**

There are four types of questions you can add to your form. They differ in the way that your end user will enter their responses:

- Two collect freeform text (Text Field and Essay)
- One presents the user with a menu of options (Drop-down Menu)
- One presents a Radio Button or Check Box list of options (Multiple Choice)

Please select the type of question you'd like to add to your form.

**Add a Question:**

- ☒ **Text Field** question type
- ☐ **Essay** question type
- ☐ **Drop-down Menu** question type
- ☐ **Multiple Choice** question type

- 5 You will need to create a question label and then type the question into the text box

**Text Field Question**

**Question Label** Reference 1 Name  
*The label is used to identify the question within your form. It is used primarily when creating the form, but can be shown to end-users.*

**Question Text** **Question Text is required.**

Default Font 6 Size 6

Please enter the name of your first reference.

Normal HTML

*This is the question that is shown to users while filling out the form.*

**Validation** Select One  
*Validation is optional, but if you are gathering one of the preset data types for which we provide validation, we can ensure that responses are submitted in the correct format.*

**Required** ☐ This question is required (the form cannot be submitted without a response to the question)

**Prepopulate** None  
*This field can have a value prepopulated rather than initially loading as empty or unselected. The prepopulated value can either be set to be the same for every user (Static), or can be based on existing data specific to the user filling out the form (if available). If you would like a value prepopulated for this question, choose the appropriate type of data from the dropdown.*

**Orientation** ☒ Horizontal (The menu is displayed to the right of the question)  
☐ Vertical (The menu is displayed below the question)

From this window, you also have the option to validate the data entered, require a response to the question, prepopulate data, and alter the orientation of the question.



6 Make your selections, then click **Save**

Now when you look at your References section, you will see your question listed. For a reference to be complete, in addition to the name, you will also want to have a way of contacting the references (such as a phone number).

7 Click **Add a new Question**

Question	Question Type	Req	Db Mapping
1 Reference_1_Name	Text Field		Not mapped

8 Follow the steps to add a new text question for a Reference Phone Number, and this time also select a **Validation** of **Phone Number** then **Save**

**Text Field Question**

Question Label: Reference\_1\_phone

Question Text: Please enter the phone number of your first reference.

Validation: Phone Number

Required: ☐ This question is required (the form cannot be submitted without a response to the question)





Prepopulate: None

Orientation: ☒ Horizontal (The menu is displayed to the right of the question)  
☐ Vertical (The menu is displayed below the question)





When you return to your Reference Section, you should now see a name and phone question for Reference 1. If you look to the far right column, you will see that the questions are not mapped.

Section 4: References					
+ Import question(s)		+ Add a Header	+ Add a new Question	Edit this section	
		Move & reorder questions		Delete this section	
	Question	Question Type	Req		Db Mapping
1	Reference_1_Name	Text Field		 	<a href="#">Not mapped</a>
2	Reference_1_phone	Text Field		 	<a href="#">Not mapped</a>



*You must map the questions in order for the information to be stored on the Applicant Master table.*

- 9 Click the **Not mapped** link to map both questions to the **Applicant References Information** table (REFER\_NAME and REFER\_PHONE\_NUMBER)

**Form Builder: Employment Application for HDINT4 (29)**

Employment Position Detail > Form Builder Main screen > Mapping: Choose a Table

**Mapping: Choose a Table**

Question: **Reference\_1\_Name** (Text Field) // View Question

Below are all the available tables in the database. Please choose the table to which you want to map the data from this question. In the next step you will perform the actual mapping to the table.

Available Tables		
Display Name	Actual Name	Description
Address Master Information	ADDRESS_MASTER	This is a physical table mapping to allow the user to map form fields to most of the columns in the ADDRESS_MASTER table
Address Master User Defined Information	ADDRESS_MASTER_UDF	This is a physical table mapping to allow the user to map form fields to user-created columns in the ADDRESS_MASTER_UDF table.
Applicant Master Information	APPL_MASTER	This is a physical table mapping to allow the user to map form fields to columns in the APPL_MASTER table
Applicant Master User Defined Information	APPL_MASTER_UDF	This is a physical table mapping to allow the user to map form fields to user-created columns in the APPL_MASTER_UDF table.
<b>Applicant References Information</b>	<b>APPL_REFS</b>	<b>This is a physical table mapping to allow the user to map form fields to columns in the APPL_REFS table</b>
Applicant References User Defined Information	APPL_REFS_UDF	This is a physical table mapping to allow the user to map form fields to user-created columns in the APPL_REFS_UDF table



10 Find the REFER\_NAME field and select **Question Response (Reference\_1\_Name)** from the drop-down box, then click **Save**

**Mapping: Set up Mapping**

Question: **Reference\_1\_Name** (Text Field) // View Question // Remove Mapping

Table: **Applicant References Information** // Change Table

Below are the fields in the table you selected. Use the dropdowns and text areas to define what data should be entered into each field when this question

Fields in: Applicant References Information		
Field Name	Field Type	Mapped Value
DTE_REFER_RCV	DATE	No Change/Default Value
FAVORABLE	STRING(1)	No Change/Default Value
REFER_ADDRESS	STRING(128)	No Change/Default Value
REFER_CITY	STRING(30)	No Change/Default Value
REFER_COMMENT	STRING(30)	No Change/Default Value
REFER_COUNTRY	STRING(3)	No Change/Default Value
REFER_EMAIL	STRING(511)	No Change/Default Value
REFER_NAME	STRING(30)	<b>Question Response (Reference_1_Name)</b>
REFER_PHONE_NUM	DECIMAL(15,0)	No Change/Default Value
REFER_POSTAL_CDE	STRING(12)	No Change/Default Value

Notice that the status on the Reference\_1\_Name question has changed to Mapped.

11 Click the **Not Mapped** link for the Reference\_1\_phone

**Section 4: References**

Import question(s) Add a Header Add a new Question Edit this section Delete this section Move & reorder questions

	Question	Question Type	Req	Db Mapping
1	Reference_1_Name	Text Field		Mapped
2	Reference_1_phone	Text Field		<b>Not mapped</b>



## 12 Select the **Applicant Reference Information** table

**Employment Position Management**

**Form Builder: Employment Application for HDINT4 (29)**

Employment Position Detail > Form Builder Main screen > Mapping: Choose a Table > Mapping: Choose a Row

**Mapping: Choose a Row**

Question: **Reference\_1\_phone** (Text Field) // View Question

Table: **Applicant References Information** // Change Table

This table currently has one or more questions mapped to it. Choose a row below to group the data from this question into a should create a new row in the database.

Rows in table: Applicant References Information	
Complex Row	Questions Currently Assigned
Row 1	Reference_1_Name;

Create a new row for this data



Because you have already mapped the Reference\_1\_Name question to this table, you have to decide if you want this question on the same row as the previous question, or on a new row.

- **Row 1:** if the information in the second question goes along with the information from the first question, you would click Row 1 so that all the details stay together in the Applicant Master table. Because the name and phone number relate back to Reference 1, you would want the them to stay together on the same record.
- **Create a new row for this data:** If the information from the question does not go with the previous question, you would create a new row so that the new information will have its own record in the Applicant Master table. If the question related to Reference 2, you would want a new row to hold the information so that Reference 1 and Reference 2 details are separated on the Applicant Master.



- 13 Look through the fields list and find REFER\_PHONE\_NUM and select **Question Response (Reference\_1\_phone)** from the drop-down box, then click **Save**

**Mapping: Set up Mapping**

Current Question: **Reference\_1\_phone** (Text Field) // [View Question](#) // [Remove Mapping](#)

Table: **Applicant References Information** // [Change Table](#)

Row: **1** // [Change Row](#)

Other Questions: **Reference\_1\_Name** (Text Field) // [View Question](#)

Below are the fields in the table you selected. Use the dropdowns and text areas to define what data should be entered into each field when this question is

Fields in: Applicant References Information		
Field Name	Field Type	Mapped Value
DTE_REFER_RCV	DATE	No Change/Default Value
FAVORABLE	STRING(1)	No Change/Default Value
REFER_ADDRESS	STRING(128)	No Change/Default Value
REFER_CITY	STRING(30)	No Change/Default Value
REFER_COMMENT	STRING(30)	No Change/Default Value
REFER_COUNTRY	STRING(3)	No Change/Default Value
REFER_EMAIL	STRING(511)	No Change/Default Value
REFER_NAME	STRING(30)	Question Response (Reference_1 Name)
REFER_PHONE_NUM	DECIMAL(15,0)	Question Response (Reference_1_phone)
REFER_POSTAL_CDE	STRING(12)	No Change/Default Value
REFER_STATE	STRING(2)	No Change/Default Value

- 14 You will see a message in the Notifications section that your mapping will not be complete until validated, click **Validate Mapping**

**Employment Position Management**

**Form Builder: Employment Application for HDINT4 (29)**

**Form Settings:**

- Edit basic form settings
- Set up payment options
- Set up completion messages

**Notifications:**

Your database mapping has not been validated. Please validate it with the link below before using the form.

[Done](#) [Preview this form](#) [Validate Mapping](#)



Once your mapping has been validated, you are almost finished. You now need to setup a message that applicants will see when they submit their application form.

15 Click **Setup completion messages**

16 Write the messages that applicants will see for both a Successful and Unsuccessful application submission

17 Click **Save**

18 Click the link for **Employment Management** portlet to get out of FormBuilder after saving



## STEP 5: SUBMITTING APPLICATIONS

Once you have built an application form, people can apply for the position from the Employment Position Application portlet.



This step will be completed by the applicants.

### 1 Apply for the position as a guest

The screenshot shows the 'Employment App and Mgmt' page with the following elements:

- Header:** UNIVERSITY logo, navigation links (Course Evaluation, Admissions, Welcome, Academics, Budget, Campus Life, CRM Admissions Officer), and a 'more' link.
- Search Section:** Includes input fields for 'Position title (some or all)', 'Keywords (Description, category, etc)', and dropdown menus for 'Department' (Any), 'Classification' (Any), and 'Type' (Any). A 'Search positions' button is highlighted with an orange box.
- Annotations:**
  - An orange callout box says: 'If you are a current employee and have an account, log into JICS' with an arrow pointing to the 'Login' button.
  - An orange bracket on the right side of the search criteria says: 'You can narrow your search by entering search criteria'.
  - An orange callout box says: 'View your search results' with an arrow pointing to the 'Search positions' button.
- Search Results Table:**

Position	Department	Classification	Type	Posted
HDINT4	Technology	Other Pay-Temp	Part Time	None specified

### 2 Click on a position link to see position details

The screenshot shows the 'Employment App and Mgmt' page with the following elements:

- Header:** 'Employment App and Mgmt' and 'Printer Friendly' link.
- Position Details:** 'HDINT4' with the note 'Accepting applications'.
- Buttons:** 'Apply for the HDINT4 position' and 'Apply now' (highlighted with an orange box).
- Job Details:**
  - Job type: Part Time
  - Location: Main Campus
  - Department: Technology
  - Salary: \$0.00 per hour
- Annotations:**
  - An orange callout box says: 'Have a question?' with an arrow pointing to the 'E-mail us' link.
- Footer:** 'Back to job listing' link.



3 Click on **Apply now**

- 4 On the application page for the position, you have two options:
- If you are applying for the position the first time, click **Click Here to start filling out this employment application**
  - If you are coming back to finish a prior application, enter your key and click the **Retrieve Employment Application** button

5 In the application, answer all the questions and then save or continue to the next page



- 6 If you decide you need to finish the application at a later time, and click the Save and Finish Later button, you will be given a key that will allow you to return

**Employment Position Application**

**Employment Application for HDINT4 (29)**

Your key is **CExcFn4zbX**

If you will need to access your application later, save this key

Please save this key. It is the only way you can access your saved employment application (if you would like to have it e-mailed to you, see below). To continue filling it in, return to this page and enter your key when prompted. Your previous progress will automatically be retrieved. You can bookmark this page to make returning here as easy as possible.

**Have your key e-mailed to you**

If you would like us to e-mail you your key, please enter your e-mail address below and click the "E-mail My Key" button.

Your email address: maryjackson@aol.com

For your convenience, you can have the key emailed to you

[Return to employment application list](#) | [Continue filling out employment application](#)

- 7 Finish filling out the application, and on the last page, enter your email address and click **Submit Application**

**Submit Your Employment Application**

Once your Application is satisfactory submit using this button.

Send an e-mail acknowledgment of this submission to this e-mail address:

maryjackson@aol.com

[<--Previous Page](#) [View Table of Contents](#)

- 8 The user(s) in the group designated to be notified when an application is will receive an email (see example below)

From: keitha.truong@jenzabar.com Sent:

To: O'Donnell, Alexis; Newname, Mia; January, Jane; Donald, Duck

Cc:

Subject: Employment Application (Employment Application for HDINT4(29)) submitted

Attention:

"Employment Application (Employment Application for HDINT4 (29))" has been submitted from the Employment Application Portlet.

It was submitted on Monday, October 28, 2013 11:17 PM.

The following individual(s) are in charge of processing this submission:

O'Donnell, Alexis  
Newname, Mia  
January, Jane  
Duck, Donald

The following information was submitted:

**Personal Information**

Last Name: Jackson  
First Name: Mary  
Middle Name:  
Email Address: maryjackson@aol.com  
Mobile Phone: 5404442222

**Permanent Address**

Address Line 1: 144 Maple Street  
Address Line 2:  
Address Line 3:  
City: Harrisonburg





## STEP 6: PROCESS APPLICATIONS

Once you receive applications, you will need to process them in EX.

- 1 Go to the **Process Internet Submissions** window in EX

Submission Type	Source	Status	Payment Status	Submission Date	ID Number	SSN	Name	Third Party Submitter	City
Employment Application	Employment Application	Partially Processed	N/A	7/18/2013	100623	000-00-0000	Deen, Paula		Savannah
Employment Application	Employment Application	Partially Processed	N/A	8/15/2013	100630	000-00-0000	Medley, Maria Test		Harrisonburg
Employment Application	Employment Application	Partially Processed	N/A	10/28/2013	181	724-66-6003	Newname, Mia Nancy		Harrisonburg
Employment Application	Employment Application	Partially Processed	N/A	10/28/2013		000-00-0000	Jones, Joseph Alvin		Harrisonburg
Employment Application	Employment Application	Ready to Process	N/A	10/28/2013		000-00-0000	Jones, Michael		Harrisonburg

- 2 Select the submission you want to view, for this example, we will be looking at Joseph A. Jones Submission Type 560 Employment Application
- 3 Double-click the row to view the submission details
- 4 When you are ready to process a submission, highlight the row and click **Process** to go to the **Applicant Master**
  - o Duplicate Name search will come up if applicable. Research as to whether this is an existing person in your database or a new person.
  - o If it is a new id, click on **No Match – New ID**. Then when the **Applicant Master** window comes up, click on **Save**. This will assign an id number to the applicant.

Any details mapped on the FormBuilder application will appear in this window

You can add as much, or as little information to the expandable tabs as needed

Change the Application Status to In Progress



- 5 Set the application status for the position to **In Progress**
- 6 Log into JICS as a member of the hiring committee
- 7 You will see any applications that you can review for any positions where you are on the hiring committee, click on the position you want to view

**Employment Position Management**

**Your Hiring Committees**

As a member of the hiring committee for the following positions, you are tasked with reviewing the submitted applications and helping decide who to bring in for an interview.  
*Click a position title to read more*

Maintenance Manager - All Facilities #22  
In the Maintenance department  
Open for applications, 1 received so far  
You have 0 new application(s) to review for this position

**HDINT4 #29**  
In the Technology department  
Open for applications, 2 received so far  
You have 2 new application(s) to review for this position



*Make sure all people in hiring admin position have the position status set to Active or a row will not be written to ORG\_POS\_APPL\_APPROVAL\_HIST.*



Do not change status of applicant to Approved and then back to In Progress. Setting them to Approved flips the flag on the Position Request to Filled, but setting it back does not undo that change.

- 8 Click on the row of the person who's application you want to review

**Employment Position Management**

**HDINT4 #29** [Back to the Main screen](#)

This position is **open** for applications. To date **2 application(s)** have been submitted.

[Preview](#) [Position Listing](#) [Application Form](#) [Hiring Committee](#)  
[Preview the listing](#) [Edit the listing](#) [Edit the application](#) [View the 3 member\(s\)](#)

Applications for this position

Applicant	Submitted	Your decision	Committee decision
Jane A Smith	Tuesday, October 29, 2013	Needs a decision	Under consideration
Michael Jones	Monday, October 28, 2013	Needs a decision	Under consideration

Discussion about this position

No Comments/Attachments

[Add a comment](#) [Add a file](#)



- 9 After careful evaluation of the applicant, click the **Yes, I Approve** or **No, I don't Approve** button to approve or deny the candidate

HDINT4 #29 Back to job listing

**Jane Smith**  
Applied on October 29, 2013 Next applicant >

[View the Application Form](#)

**Position Manager Decision**  
Under consideration

**Committee Consensus So Far**  
Split evenly  
(by 0 to 0, with 3 undecided) [View individual votes](#)  
[E-mail the committee](#)

Do You Think This Candidate Is Worth Interviewing?

☒ Yes, I approve ☐ No, I don't approve

Discussion about this application

[Add a comment](#) [Add a file](#)

- 10 If you have any comments about your approval or denial, enter them here

**Vote Cast Successfully**

☒ You have **voted in favor** of bringing Jane Smith in for an interview. Would you like to leave a comment to the rest of the committee explaining your decision?

Jane is a good candidate for the position.

[Save comment](#) [No, thanks](#)

You can also leave comments at any time in the discussion area at the bottom of this screen.



Any comments entered can be read by other members of the Hiring Committee or the HR Position Administrator.

### HR Position Administrator Approval

- 1 When the HR Position Administrator or the HR Administrator signs into the **Employment Position Management** portal, they will see the status of applicants for a position

HDINT4 #29

☒ Approved by HR on 10/28/2013  
☒ Approved by Approval Committee on 10/28/2013  
**Hiring now**



## 2 Locate the position request

The screenshot shows the 'Employment Position Management' interface. At the top, it says 'HDINT4 #29' and 'Back to job listing'. Below this, the applicant's name 'Jane Smith' is displayed with the date 'Applied on October 29, 2013'. There is a button 'View the Application Form' and a link 'Next applicant'. The 'Position Manager Decision' section shows a status of 'Under consideration' with a checkmark icon. A red box highlights the text: 'As hiring manager, your decision is final and will be communicated to Jane via HR.' Below this, there are two buttons: 'Yes, offer Jane an interview' (with a green checkmark icon) and 'No, I don't want to interview Jane' (with a red X icon). The 'Committee Consensus So Far' section shows 'In favor of an interview with Jane Smith (by 1 to 0, with 2 undecided)' and a link 'View individual votes'. At the bottom, there is a button 'E-mail the committee'.



*Be aware, that the hiring manager, can override the committee's decision and deny this person or go ahead and offer the interview without full committee approval.*

## 3 Approve an individual that you want to continue on to the interview process

The first part of the screenshot shows a dialog box titled 'Approve Jane for an interview'. It contains a green checkmark icon and the text: 'Are you sure you want to **approve Jane Smith for an interview**? If you confirm, HR will initiate the process of coordinating an interview, so this decision is final.' At the bottom of the dialog box, there are two buttons: 'Approve Jane' and 'Not now -- return to the application'. The second part of the screenshot shows the 'Employment Position Management' interface with a green banner at the top saying 'HDINT4 #29'. Below this, a green box contains a green checkmark icon and the text: 'You have successfully approved Jane for an interview for this position. HR will coordinate with you and Jane to schedule an interview.'

- 4 Return to the **Applicant Master** window in EX, and change the Application Status to **Interview**
- 5 At this point in the applicant tracking process, you will start to interview and evaluate the approved applicants



## STEP 7: HIRE AN APPLICANT

Once the interviewing process is complete, and you have selected an applicant for the position, you will need to make an offer to the chosen applicant.



There is no automatic method for making an offer, so you will need to call or write the applicant.

In EX, you will go back to the **Applicant Master** window and access the applicant's record. Change the Application Status to **Offered**.

Applicant Master

ID Number: 100645 Jane A Smith

Name: Smith Jane A

E-Mail Address: Mobile Phone #: 00000 (000) 000 0000

Expand All Collapse All

Applicant Information

Address Information

Biographical Information

Positions Applied

HDINT4

Requisition #: 29 Position: HDINT4 Position Title: HDINT4

Application Date: 10/29/2013 Application Status: Offered Status Change Date: 10/29/2013

Available Date: 00/00/0000 Applicant Rating Code: Scale: Salary Requested: .00

Offer Date: 00/00/0000 Where Heard From: Recruiting Expenses: .00

Employment History

Competencies

References

When the Application Status is changed to **Offered**, the Hiring Committee will see that an offer has been made.

HDINT4 #29  
In the Technology department  
Offer made

If the employee accepts, update the Applicant Status to **Accepted**, then the Hiring Committee will see that the individual has been hired.

HDINT4 #29  
In the Technology department  
Hired Jane A Smith



## Transfer New Hire to Employee

When an applicant is hired, they will need to have a record in the Employee Master record. Instead of creating an entirely new record for the individual, you can use the **Transfer New Hire to Employee** window to bring over the details from the Applicant Master table.

This option allows the user to selectively transfer hired applicant information over to the employee master and position table. You will need to specify an HR Group/Subgroup for any selected applicant in order for them to be processed.

After the process has completed, be sure to review the new Employee data and enter any other applicable information such as salary, benefits, and taxes.

ID Number	Name	Position Title	Group Code	SubGroup Code	Group Description
	Not Found!				
100645	Jane A Smith	HDINT4			

Process Cancel

Assign the new employee a group/subgroup code



When an Application Status is changed to **Accepted** on an applicant's record, their name will automatically appear on the Transfer New-Hire to Employee window.

- 1 Highlight the new employees you want to transfer and click **Process**
- 2 The Process button creates as much information as it can on the **Employee Master** window



*This process will move your new employees to the Employee Master table.*

When the new employees appear in the Employee Master, a record will automatically appear in the table without you needing to manually enter the basics of the employee's information.

- 3 Enter a start date, and finish adding any details needed

HR Employee Master via Payroll

ID # 100645 Jane A Smith User Defined

Name Addresses Header Details Benefits Positions Biograph Taxes Payroll Achievements Personnel Miscellaneous

Active Positions

HDINT4

Position Code: HDINT4 Position Title: HDINT4 Show On Web?

Position Description: Help Desk Intern

Department: Technology Status: Active Shift:

Classification: X Other Pay-Temp Type: Hourly Termination Reason:

Category 1: Start Date: 07/31/2018 FTE: 1.00

Category 2: End Date: 00/00/0000

Supervisor: Not Found!

Inactive Positions



## Chapter 7. RUNNING REPORTS

This chapter will review some of the reports available in the Payroll and Personnel modules.



On many of the report windows, you will see a Customize button. If you have InfoMaker, you can click the Customize button to determine what information appears in the report and design the report to format the page layout and content.

### OBJECTIVES

At the end of this chapter, you will be able to:

- Identify and Run Payroll and Personnel Reports
- Work with Regulatory Reporting
- Run Applicant Tracking Reports

### PAYROLL REPORTS

There are several reports available to you in the Payroll module; some may be required for the Payroll process, while others will be helpful for your own records.

#### Employee Profile

This payroll report will provide you with all available information for the employee(s) selected.

From this report, you will be able to see all information from all tabs on the **HR Employee Master via Payroll** window.

This is a good way to view all of a specific employee's benefits and positions.

ID Number	Name
323	Chaing S. Eric
324	Chaing James Francis
325	Chaing Lynn Kimberly
326	Chaing Edna
342	Smead Bob
356	Chaing Lynne Beth
498	Caruso Henrietta
499	Caruso Nathan
500	Steadman Ann Sarah

Report Title: Employee Profile - S. Steadman

Reports: <Original>

☐ Immediate ☒ Preview

OK Cancel Customize



Employee Profile(Print Preview)

ID Num: 500	Jenzabar EX Customer	KLHARMON	Page1of2
Sarah Ann Steadman	Employee Profile		03/24/2014 3:25:23 PM
Westgate Apts 502 Georgetown Rd Apt A Charlottesville, VA 22901-2432			
Group Code : 1	Subgroup : *	SSN : 200-54-1995	Birth Date : 03/11/1958
Ethnic Group: W	Gender Code: F	M/S: S	Citizenship: US
Active/Inactive : A			
Hire Date : 12/31/2003	Terminate Date : 00/00/0000	Reason Cde/Desc:	
Fulltime Date : 12/31/2003	Rehire Date : 00/00/0000	Rehire Reason :	

## Other Payroll Reports

<b>Federal Wage/ Tax Reports</b>	This report will allow you to print the Federal Earnings Proof Report or the Federal Unemployment Tax Proof Report for a month, quarter, or year period.
<b>State Wage/ Tax Reports</b>	From this report, you can print either the State Earnings Proof Report or the State Unemployment Tax Proof Report for a month, quarter, or year period.
<b>State Reporting Media</b>	This report allows you to generate a reporting file and save it to a Magnetic Media file that you can send to your state or local tax authority.
<b>Local Wage/ Tax Reports</b>	Use this report to print either the default Local Wage/Tax Report or the PA Municipality Report for a month, quarter, or year period.
<b>W-2 Controls</b>	Use this window to enter your school's W-2 information. There are three sections on this window: <ul style="list-style-type: none"><li>Transmitter: contains the name and location of the organization transmitting the information</li><li>File Return: contains the name and location where the file was created</li><li>W2 Form Name Address: contains the employer's name, address and ZIP code as it is printed on the W-2s</li></ul>
<b>Generate W-2s</b>	From this window, you will print W-2 forms or create media formats to send to the Federal Government.





## PERSONNEL REPORTS

There are several reports available to you in the Personnel module; these reports will be helpful as you maintain your employee records.

### Regulatory Reporting

In Personnel, the regulatory reporting feature will allow you to generate the following federally mandated reports for submission to the Department of Education:

- Integrated Postsecondary Education Data System (IPEDS) Report
- Equal Employment Opportunity Commission (EEOC) Report
- Colleges & University Personnel Association (CUPA) Faculty Salary Report
- Colleges & University Personnel Association (CUPA) Administrative Report
- Colleges & University Personnel Association (CUPA) Mid-Level Report

Prior to generating these reports, you can create employee snapshots to evaluate employee information and determine if any information is missing or inaccurate. An employee snapshot will allow you to capture and view employee information at a specific point in time for reporting purposes. The snapshots contain basic employee information such as name, address, position information (including current salary) and can be used to:

- Evaluate employee information for accuracy
- Simplify the reporting process by collecting data for a specified historic period
- Filter employee records by IPEDS reporting requirements

There are some general snapshot criteria that you will need to include for all employee snapshots:

- Purpose Type: describes the purpose and is used to create the Purpose Code (e.g., HR IPEDS)
- Purpose Code: defines why the information is being collected for the snapshot (e.g., 2013 IPEDS)
- Employee with the following:
  - Biographical master data (i.e., valid ethnicity and gender)
  - A primary or active position with defined salary information
  - Position start and salary review dates

If you are generating a snapshot with a specific regulatory reporting focus, you will need additional criteria beyond the general snapshot criteria:

#### IPEDS

- IPEDS occupational activity, staff type, and academic rank must be assigned to the employee's position on the Organization Positions window

#### CUPA

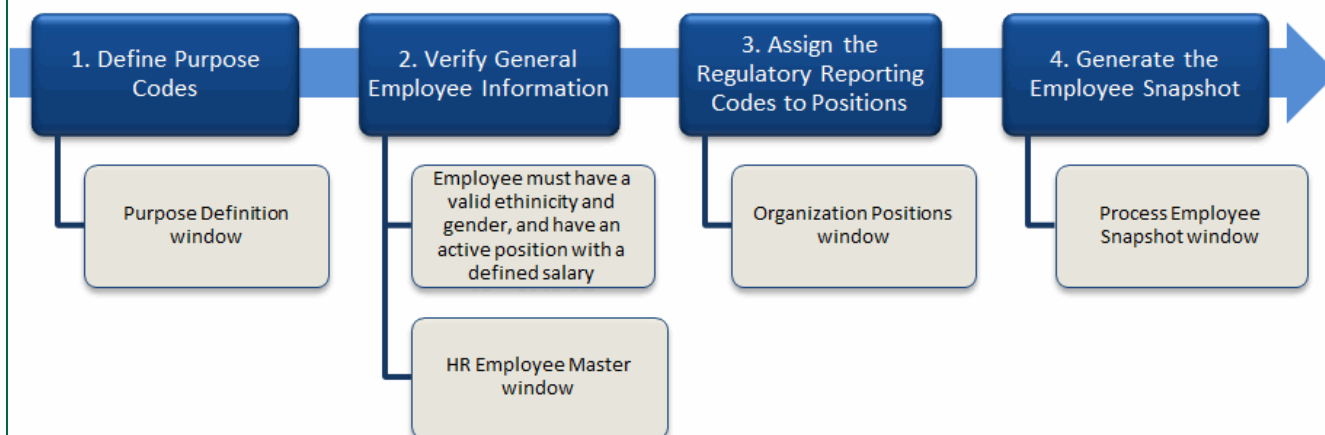
- CUPA, CIP codes and FLSA type must be assigned to the employee's position on the Organization Positions window

#### EEOC

- EEOC category must be assigned to the employee's position on the Organization Positions window



To generate an employee snapshot, you will need to follow four steps:



### Process Employee Snapshot

From this window, you can create, recreate, maintain, and delete snapshots. At the top of the window you can retrieve existing snapshots by selecting the year and purpose, then view your results in the bottom half of the window.

Process Employee Snapshot

Filter By

Year:

Purpose:

Retrieved Snapshots for Year: ALL and Purpose: ALL

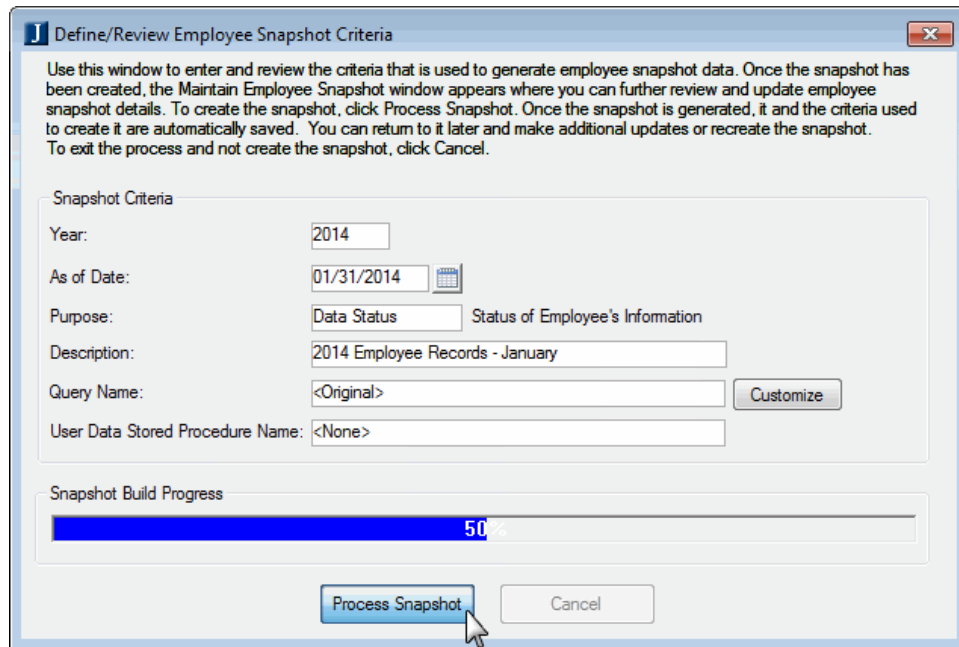
Year	As of Date	Purpose	Description	Locked
	00/00/0000			<input type="checkbox"/>
2013	12/31/2013	HR IPEDS - IPEDS for Personnel	2013 IPEDS	<input type="checkbox"/>
2013	09/30/2013	HR EEOC - EEOC for Personnel	HR EEOC for Personnel	<input type="checkbox"/>
2013	03/29/2013	HR CUPA - CUPA for Personnel	1st Quarter CUPA 2013	<input type="checkbox"/>
2012	12/31/2012	Data Status - Status of Employee's Information	Year End Employee Records 2012	<input checked="" type="checkbox"/>
2012	11/02/2012	HR IPEDS - IPEDS for Personnel	2012 IPEDS - November	<input type="checkbox"/>
2011	08/15/2011	HR IPEDS - IPEDS for Personnel	IPEDS 2011	<input type="checkbox"/>
2011	01/12/2011	HR EEOC - EEOC for Personnel	HR EEOC - EEOC for Personnel	<input type="checkbox"/>
2010	12/31/2010	HR CUPA - CUPA for Personnel	HR CUPA Data for Reports	<input type="checkbox"/>
2010	09/01/2010	RDS Purpose - RDS IPEDS	RDS 2010	<input type="checkbox"/>



*You can lock the snapshots to prevent anyone else from editing or deleting the snapshot by selecting the Locked checkbox.*



When you create a new snapshot, the **Define/Review Employee Snapshot Criteria** window will appear. You will enter the criteria details that will be used to generate the snapshot.



**Define/Review Employee Snapshot Criteria**

Use this window to enter and review the criteria that is used to generate employee snapshot data. Once the snapshot has been created, the Maintain Employee Snapshot window appears where you can further review and update employee snapshot details. To create the snapshot, click Process Snapshot. Once the snapshot is generated, it and the criteria used to create it are automatically saved. You can return to it later and make additional updates or recreate the snapshot. To exit the process and not create the snapshot, click Cancel.

Snapshot Criteria

Year: 2014

As of Date: 01/31/2014

Purpose: Data Status Status of Employee's Information

Description: 2014 Employee Records - January

Query Name: <Original> Customize

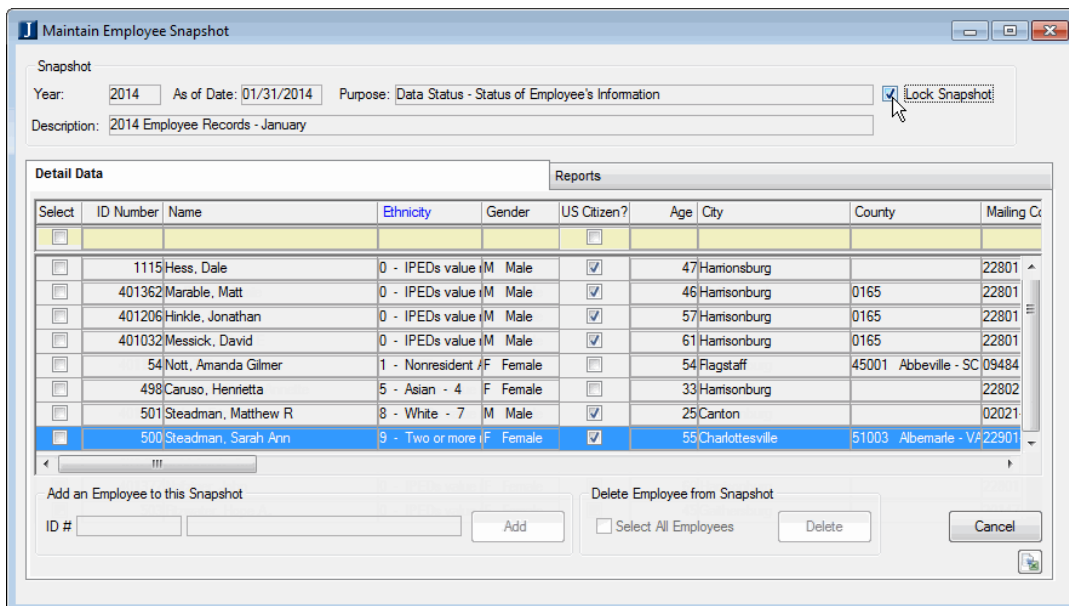
User Data Stored Procedure Name: <None>

Snapshot Build Progress

50%

Process Snapshot Cancel

Once the snapshot is processed, the **Maintain Employee Snapshot** window will appear. From this window, you can further review and update employee snapshot details and view/print reports.



**Maintain Employee Snapshot**

Snapshot

Year: 2014 As of Date: 01/31/2014 Purpose: Data Status - Status of Employee's Information Lock Snapshot

Description: 2014 Employee Records - January

**Detail Data**

Select	ID Number	Name	Ethnicity	Gender	US Citizen?	Age	City	County	Mailing C
<input type="checkbox"/>					<input type="checkbox"/>				
<input type="checkbox"/>	1115	Hess, Dale	0 - IPEDs value (M	Male	<input checked="" type="checkbox"/>	47	Harrisonburg		22801
<input type="checkbox"/>	401362	Marable, Matt	0 - IPEDs value (M	Male	<input checked="" type="checkbox"/>	46	Harrisonburg	0165	22801
<input type="checkbox"/>	401206	Hinkle, Jonathan	0 - IPEDs value (M	Male	<input checked="" type="checkbox"/>	57	Harrisonburg	0165	22801
<input type="checkbox"/>	401032	Messick, David	0 - IPEDs value (M	Male	<input checked="" type="checkbox"/>	61	Harrisonburg	0165	22801
<input type="checkbox"/>	54	Nott, Amanda Gilmer	1 - Nonresident (F	Female	<input type="checkbox"/>	54	Flagstaff	45001 Abbeville - SC	09484
<input type="checkbox"/>	498	Caruso, Henrietta	5 - Asian - 4	F Female	<input type="checkbox"/>	33	Harrisonburg		22802
<input type="checkbox"/>	501	Steadman, Matthew R	8 - White - 7	M Male	<input checked="" type="checkbox"/>	25	Canton		02021
<input checked="" type="checkbox"/>	500	Steadman, Sarah Ann	9 - Two or more (F	Female	<input checked="" type="checkbox"/>	55	Charlottesville	51003 Albemarle - VA	22901

**Reports**

Add an Employee to this Snapshot

ID # Add

Delete Employee from Snapshot

☐ Select All Employees Delete Cancel



**When you update employee snapshot information, only the snapshot is modified. For example, if you update an employee's Ethnicity, the ethnicity is not updated in the employee's biographical data in the Employee Master/Data tables.**



From the **Maintain Employee Snapshot** window, you can select the **Reports** tab to view more information about the snapshot. These six reports will take the data from your snapshot and present the information in a more user friendly way. You can customize these reports.

Snapshot  
Year: 2014 As of Date: 01/31/2014 Purpose: Data Status - Status of Employee's Information  
Description: 2014 Employee Records - January

Detail Data Reports

Select  
Report Type: Employee Snapshot Positions Regulatory Data Report: <Original> Customize... Retrieve

r\_ir\_empl  
Employee Regulatory and Biographical Data  
Employee Snapshot Positions Regulatory Data  
Organization Positions Regulatory Data  
Employees with Multiple Primary Positions  
Employees with No Primary Positions  
Employees with no Biographical or Position Data

Jenzabar EX Customer  
Employee Snapshot Positions Regulatory Data  
KLHARMON

Employee ID	Name	Code	Position Title	Position Status	Position Start Date	Position End Date	Staff Type Code	FLSA Type Code	Contract Length
498	Caruso, Henrietta	ACCNT	acct	A	00/00/0000	00/00/0000	Full-Time non-medical	Non-Exempt	12
Occupational Activity: Other professional (support/service) CUPA Description: Accountant, Senior - DO NOT USE									
Academic Rank: No Academic Rank CIP Description: Agricultural Business and Management, Generals									
EEOC Category: Professionals									
The Employee Snapshot Position has not been defined as a Primary Active position									
This Employee Snapshot Position is set to an inactive CUPA Code									
499	Caruso, Nathan	ACCNT	acct	A	00/00/0000	00/00/0000	Full-Time non-medical	Non-Exempt	0
Occupational Activity: Other professional (support/service) CUPA Description: Accountant, Senior - DO NOT USE									
Academic Rank: No Academic Rank CIP Description: Agricultural Business and Management, Generals									
EEOC Category: Professionals									
The Employee Snapshot Position has not been defined as a Primary Active position									
This Employee Snapshot Position is set to an inactive CUPA Code									
401198	Cox, Tiffany	CLPAY	Pay/Accting	P	00/00/0000	00/00/0000		Non-Exempt	120
Occupational Activity: 02/05/2014 CUPA Description: Page 1 of 26									

Cancel

## Regulatory Reporting

From the **Regulatory Reporting** window, you will choose one of the Regulatory Forms (IPEDS, EEOC, or CUPA) and then select one of your snapshots. The report will pull information and breakdown the content to types of employees and various important details.

Regulatory Reporting

Regulatory Forms  
EEOC - HR EEOC

Reporting Date / Snapshot Date  
Snapshot: 2013 - 09/30/2013 12:00:00 AM - EEOC for Personnel (ID 88) - H

Report  
Part: EEOC1 Report: <Original> Customize... Print

Employment Data  
As of Reporting Period: 09/30/2013


EEOC Job Categories	Race/Ethnicity														Total	
	Hispanic or Latino		Male								Female					
	Male	Female	White	Black or African American	Native Hawaiian or Other Pacific Islander	Asian	American Indian or Alaska Native	Two or more races	White	Black or African American	Native Hawaiian or Other Pacific Islander	Asian	American Indian or Alaska Native	Two or more races		
Professionals	0	0	1	0	0	0	0	0	0	0	0	0	1	0	1	3
498 Caruso, Henrietta						Asian							Female			
501 Steadman, Matthew R						White							Male			
500 Steadman, Mrs Sarah Ann						Two or more races							Female			
Total	0	0	1	0	0	0	0	0	0	0	0	0	1	0	1	3



Prior to generating these reports, you will need to create employee snapshots to evaluate employee information and determine if any information is missing or inaccurate.



## Other Personnel Reports

<b>Performance\Salary Reviews</b>	This reporting option will print a listing of upcoming employee reviews (salary or performance).
<b>Staff Directory</b>	<div>This window will allow you to generate a list of all staff, and can be run to show a specific employee, all employees, or employees belonging to a group/subgroup.</div> <div><i>In order for employees to appear in the Staff Directory report, the Include Staff Directory checkbox must be selected on the Miscellaneous tab of the HR Employee Master window.</i></div>
<b>Exit Interview</b>	This option will generate and print an exit interview form for employees who have been inactivated due to termination or resignation.
<b>Employee List by Job</b>	This report will list all the positions and employees who are in a select job position. You can select a specific job code to search, or you can generate a list of all positions and employees by not selecting search criteria.
<b>Salary Statistics</b>	Use this report to generate information on pay amounts and the number of employees in a specific job code.

## APPLICANT TRACKING REPORTS

When working with CRM Staff, there are several reports you can run to help you through the Applicant Tracking process.

### Applicant Diversity Report

You can generate reports that indicate classifications such as gender and ethnicity for all applicants for a particular position.



*If you do not specify an Organization Position you will get results for all active positions.*

**Applicant Diversity Report**  
This window allows the user to generate reports that will indicate the classification, such as gender and ethnicity, for all applicants for a particular position.

Type of Report  
☒ Summary  
☐ Detail

Report Grouping  
☒ By Position ☐ By Application Status  
☐ By EEOC ☐ All Applicants

Report Type:

Organization Position:

Application Begin Date:

Application End Date:

Report Title:

Print  
☐ Immediate  
☒ Preview

Reports:

