

Grad NOA Contract Generation

MANAGER SELF SERVICE QUICK REFERENCE GUIDE



the university of arizona Human Resources QUESTIONS? WORKFORCE SYSTEMS 520.621.3664

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1.0 GENERATING GRAD NOA LIST

1.1 Administer Grad NOAs

Navigation Path: Manager Self Service > Utilities > NOA Grads > Administer NOAs

Click Generate Grad NOA List radio button



1.2 Select Dept/College or Employee List Option

• Click HR Dept or College radio button



1.3 Department/College Search

- 1. Set Contract Length
 - The drop down lists Fiscal, Academic and blank contract lengths as selection options. If left blank, all contract lengths appear in the results
- 2. The Include Pending Contracts is unchecked by default.
 - Contracts "*pending*" with HR Department/College Approvers and the Employee will be displayed if the "Include Pending Contracts" box is checked.
- 3. A new NOA cannot be submitted if one is already pending with the same department generating the list—only one Grad NOA can be pending for an employee/department combination at a time. If an employee has multiple jobs, Grad NOAs can be submitted/pending for the two departments at a time.

Select	t Employee	S
College ID		
Contract Length	Fiscal 😜	
Employee Status	\$	Include Pending Contracts

- 4. Enter Department number
 - Multiple departments can be selected by clicking on the "+" sign
- 5. Click the **Search** button

Department	
	_
1 0001 Q Test Dept	+ -

1.4 Select Employees

1. Click the Select check box next to employee(s) name

Employees can be selected individually or the entire list can be picked by clicking on the **Select All** option.

2. Click the Continue button

The "Termination Pending" column will display a date if a MSS Termination request is pending and a Grad NOA generation will not be allowed.

	<u>Select</u>	Emplid	Last Name	First Name	UA Title	Payroll Status	Deptid	Expected Job End Date	Last Action Date	Last Acceptance Date	Termination Pending
1	Ø	23145714	Bella	Stella	Graduate Assistant, Teaching	Active	0429	07/31/2013	01/30/2013		No
2	Ø	23060010	Carter	Jake	Graduate Associate, Teaching	Active	0429	05/15/2013	01/30/2013	06/05/2013	No
3		02194562	East	Buddy	Graduate Associate, Teaching	Active	0429	09/19/2013	06/05/2013		No

1.5 Generate Grad NOAs

- 1. Click Generate Grad NOA button
 - A list of the individual(s) selected in the previous page is displayed to allow the user to confirm the results.

60000 8100 8100 8100 8100 8100 8100 8100	Co	nfirm Empl	oyees Selected		
	Emplid	Last Name	First Name	UA Title	Payroll Status
1	23145714	Bella	Stella	Graduate Assistant, Teaching	Active
2	23060010	Carter	Jake	Graduate Associate, Teaching	Active
3	02194562	East	Buddy	Graduate Associate, Teaching	Active
	Return to Se	arch	Ca	Generate Grad N	A

1.6 Grad NOA Contract View/Submit

- 1. Click View Contract link to view each contract generated individually.
 - Click on the View All Contracts link to display all contracts generated in the same file.

Grac	d NOA Vie	ew/Su t Status Withdr	Not Submit aw List	tted	Contracts		
View Contract Po	osition Xref	Send	Withdraw	<u>Trans Nbr</u>	Empl ID	First Name	Last Name
1 View Contract Po	osition Xref			427738	23145714	Stella	Bella
2 View Contract Po	osition Xref			427739	23060010	Jake	Carter
3 View Contract Po	osition Xref			427740	02194562	Buddy	East
Save for Late	r Exit]			1		

- 2. Select Send or Withdraw check boxes for each employee listed.
 - The "Submit" button is invisible until All rows have a "Send" or "Withdraw" box checked ("Withdraw All" button appears when all Withdraw boxes are checked)
 - The difference between the "Withdraw List" check box and "Withdraw All" button is that the "Withdraw All" button allows the user to mark all records and deselect a few in order to send partial list to a limited number of individuals from a long list—the "Withdraw List" cancels all contracts generated.
 - You may select "Save for Later". The saved list can be accessed using the "Return to Work in Progress" radio button in the Administer Grad NOA page. The System time out will act as a "Save for Later" transaction—this feature is only available after the Grad NOAs are generated.
- 3. Click Submit
 - The "Email Sent to Grad" values will only populate upon "Submit" if the last approver generated the list. Otherwise, the transaction routes for approval.
 - An email will be sent to the Grad automatically upon final approval step—by either HR Dept or College depending on roles provisioned.

2.0 GENERATE INDIVIDUAL GRAD NOAs

2.1 Administer Grad NOAs

Navigation Path: Manager Self Service > Utilities > NOA Grads > Administer NOAs

- 1. Click Generate Grad NOA List radio button
- 2. Select **Employee** radio button
- 3. Enter EmplID
 - The initiator may select one or more employees by using the "+" sign
 - Emplid The magnifying glass next to the Emplid allows the user to search for an employee by First Name, Last Name and Name (last name, first name)
- 4. Click the **Search** button
- 5. Click the **Select** check box next to desired employee(s)
 - The individual(s) selected in the previous page is displayed to allow the user to confirm the results of the search, and to select the appropriate row if the individual is employed for more than one department.
 - Employees can be selected individually or the entire list can be picked by clicking on the "Select All" option.
- 6. Click the **Continue** button
 - The "Termination Pending" column will display a date if MSS Termination request is pending and Grad NOA generation will not be allowed.
- 7. Click Generate Grad NOA button
 - A list of the individual(s) selected in the previous page is displayed to allow the user to confirm the results.
- 8. Click View Contract link to view each contract (or use "View All Contracts")
- 9. Select Send or Withdraw check boxes for each employee listed
 - The "Submit" button is visible until All rows have a "Send" or "Withdraw" box checked ("Withdraw All" button appears when all Withdraw boxes are checked)
- 10. Click Submit
 - The "Email Sent to Grad" and "Send Date/Time" values will only populate upon "Submit" if the last approver generated the list. Otherwise, the transaction routes for approval.
 - An email will be sent to the Grad automatically upon final approval step—by either HR dept or College depending on roles provisioned.

3.0 MSS APPROVAL PAGELET

Approvals can be managed through the MSS approval pagelet or by navigating directly to the Manage Grad NOA page. (Manager Self Service > Utilities > NOA Grads > Manage NOAs)

UAccess EN	IPLOYEE
Favorites Main Menu	
MSS Approval Summary	¢ -
MSS Approval Summary Transaction Type	Count

Pending G	rad NOA Ap	proval		
Trans Nbr	Created By	Created Date	Created Time	Run Type
10144	ZAVALA	06/06/2013	09:28 am	HR Dept Or College
10145	ZAVALA	06/06/2013	09:32 am	Employee

4.0 MANAGE GRAD HOLDS

HR Department/ College Division Approvers will be able to place an administrative hold on either individual Grad NOAs or NOAs for entire departments. Once on hold, this will exclude grads from ALL NOA Generation Processes.

Navigation: Manager Self Service > Utilities > NOA Grads > Administer NOAs

1. Select the Manage Grad NOA Holds radio button



- 2. Enter Department number (or GA EmplID)
 - Users can only search for employees within departments for which they are provisioned; therefore, the list returned using the magnifying glass will be limited to those departments.
- 3. Click **Display Holds Only** check box to manage records previously placed on hold or leave the box unchecked to display the entire department list.
- 4. Click Search button

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OR										
Ema	Persona	alize Find	🖻 📔 🕌 First	I of 1 D Las	3					
Emp	Name									
· !	A									
Searc	clear									
Selec	ct All 🗆 Remove All									
							Persona	lize I Fi	nd 🕮 🏪 First 🖾	1-2 of 2 🗈
Apply Hold	UA Title	Remove Hold	Emplid	Last Name	First Name	HR Dept	Expected Job End Date	Hold Status	<u>Held By</u>	Hold Date
	Graduate Assistant, Teaching	0	23091056	Reacher	Jack	0429	05/19/2013	Yes	COLLAPPROVER	06/06/201
0	Graduate Associate, Teaching		23100390	Wayne	Bruce	0429	05/19/2013	Yes	COLLAPPROVER	06/06/201

5. Click the Apply Hold or Remove Hold check box next to desired employee(s)

6. Click the **Continue** button

• The "Continue" button is not visible unless at least one employee row is marked as "Apply Hold" or "Remove Hold."

		_					
Apply Hold	UA Title	Remove Hold	Emplid	Last Name	First Name		
	Graduate Assistant, Teaching	ø	23091056	Reacher	Jack		
2	Graduate Associate, Teaching		23100390	Wayne	Bruce		

7. Click the **Submit** button

- Applying a hold flag will update following values:
 - Change "Hold Status" to Yes.
 - Update "Held by" with name of the user who placed the hold.
 - "Hold Date" will be updated in table. Removing a hold flag will update following values:
 - Change "Hold Status" to No
 - "Held By" field will be blank
 - "Hold Date" field will be blank.

5.0 MANAGE GRAD NOAs

The "Manage Grad NOAs" page allows users with a College Division or HR Department Approver role to view Grad NOA lists or individual transactions that have been submitted. (NOAs that have been generated but not submitted cannot be viewed through this path.

Navigation Path: Manager Self Service > Utilities > NOA Grads > Manage NOAs

- The Manage Grad NOA search allows the initiator to open and withdraw a transaction list or a Grad NOA from an Employee Self Service page.
- Anyone with the Position Cross Reference role can access the "Manage Grad NOAs" page
- "Search by List" or "Search by Employee" are the available options

5.1 Manage Grad NOA List

Approvers can navigate to the "Manage Grad NOA List" to approve or deny an individual GA or Grad NOA List

- The approver will either "Approve All," "Deny All," "Mark for Approval" or "Mark for Denial"
- Approvers have the ability to approve or deny partial lists—the remaining records that were not selected will remain on this list until one of the actions is taken.
- Only the approver will have the ability to approve the transactions for which they are provisioned.
- Note: Set the Grad NOA Status to "Submitted For Approval"

Favorites Main Menu > Manager Self Service > Utilities > NOA Grads > Manage NOAs Manage Grad NOA List Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value	Employee HR Dept Or College
Search Criteria Contract Group Transaction Nbr: Run Data/Time: User ID: Begins with © Grad NOA Status: Search By: Search Clear Basic Search r=# Save Search Criteria	Cancelled Completed Emails Sent to Grads Emails in Progress Not Submitted Save for Later Submitted For Approval Withdrawn

5.2 Manage Individual Grad NOA Transactions

Approvers can approve or deny single Grad NOA transactions using the "Manage Grad NOA Page"

6.0 SELF SERVICE

- The Grad Asst/Assoc (GA) will receive an email when the NOA is ready for their acceptance.
- The GA must click on the **View Contract** link in order to select the "Accept" or "Decline" button.

¥.	ites Main Menu	> Self Ser	vice > Contracts >	Notice	of Appoint/Reap	pointGRD		
0	Revie	w Contr	racts					
Ja	ake Carter							
ou	r University of Ar	rizona Notice	of Appointment/Reap	pointme	nt (NOA/NOR) is	available to view a	and accept t	below.
16	ase carefully revi	ew the inform	nation on your Notice of	of Appoir	ntment/Reappoil	ntment.		
yo	ou have any ques	stions about	your NOA/NOR, or if the	e terms o	of the appointme	ent are not consiste	nt with your	
na	ierstanding, conti	act your nom	e departments busine	ss omce	before acceptin	g the appointment.		
v	checking the "acc	cent" hox hel	ow Lacknowledge that	I have r	ead my Notice o	f Appointment/Rea	nnointment	and I
y onte	checking the "acc nt to apply my sig	cept" box bel gnature indic	ow. I acknowledge that ating acceptance of the	t I have r e terms s	ead my Notice c set forth therein.	of Appointment/Rea	ppointment	and I
y o ite	checking the "acc nt to apply my sig	cept" box bei gnature indic	ow. I acknowledge that ating acceptance of the	t I have r e terms s	ead my Notice o set forth therein.	of Appointment/Rea	ppointment	and I
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y o nte	checking the "acc nt to apply my sig <u>View Contract</u>	cept" box bel gnature indic Trans Nbr	ow. I acknowledge that ating acceptance of the UA Title	t I have r e terms s <u>Dept</u>	ead my Notice of set forth therein. <u>Personalize</u> <u>Status</u>	f Appointment/Rea	ppointment	and I of 3 I L Declin
y c ite	checking the "acc nt to apply my sig <u>View Contract</u> <u>View Contract</u>	pept" box bel gnature indic Trans Nbr 427729	ow. I acknowledge that ating acceptance of the UA Title Graduate Associate, Teaching	Dept 0429	ead my Notice of set forth therein.	of Appointment/Rea 2 End End	ppointment	and I of 3 D L Declin
1 2	view Contract View Contract	Trans Nbr 427729	ow. I acknowledge that ating acceptance of the UA Title Graduate Associate, Teaching Graduate Associate, Teaching	Dept 0429	ead my Notice o set forth therein. Personalize Status Approved Approved	f Appointment/Rea Eind [ppointment	and I

7.0 REVISION HISTORY

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Change Control Log

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