eGA Training/Testing

including supersedes

Training Documentation

ITS Imaging Team
Logging In

1. To login to PRODUCTION, go to https://ega.uncc.edu
2. To login to TEST purpose, go to https://test-ega.uncc.edu

3. Login using your NinerNet credentials (e.g. username and password)

Navigating through the eGA system

NOTE: You will see a screen similar to the one pictured above.
Navigating through the eGA System

| Navigational Pane: | Lists Assistantship Navigation, Report, eGA Administration, and Workflow Administration options based off of your access |
| Welcome Link: | Offers Logout function |
| Assistantships Initiated By Me Dialog Box: | Lists all assistantships regardless of their status that was initially generated by the person currently logged in (i.e. yourself). |

Creating An Assistantship

1. Click on the **Create An Assistantship** link from the left navigation pane.

2. Enter the applicant’s **UNC Charlotte ID** and click **Search By ID** button.

3. Or Enter the applicant’s **Last and First Name** and click **Search by Name** button.

4. Select radial button next to name of intended person.

5. Click **Proceed With Selected Person** button.

NOTE: Name Search requires you to enter at least 1 character of last name.

2. Select radial button next to name of intended person.

3. Click **Proceed With Selected Person** button.
5. Enter information for New Assistantship.
NOTE: The grant funded assistantships require an Student Educational Award (SEA) decision to be made.

a. Enter **Start and End Dates** by clicking in field box and selecting date from calendar.
   Note: Number of Hours and contact information will automatically be populated. However, they can be modified.

b. Select College and Department from drop down menu.

c. Select Supervisor by clicking Magnifying glass.
   i. Enter last and first name.
   NOTE: It is required to enter at least one letter for last name.
   ii. Click Search button.
   iii. Select radial button next to name of intended person.
   iv. Click **Proceed With Selected Employee** button.

6. Select the **Assistantship Type**.

7. Enter fund number and payment amount
   NOTE: Addition fund numbers may be added but click the plus sign after the dollar amount.

8. Enter **Duties and Responsibilities** for the assistantship.

9. Enter any necessary notes or justification for the assistantship.

10. Click **Preview Approvers** button to verify information on screen and view approver list (optional).

11. Click **Submit for Approval** button to submit application.
12. Click OK button to create application.
   NOTE: You will receive a success message (or error) at top of screen with open to add additional approvers.

13. Enter additional approvers as necessary.
   a. Click field box or click *magnifying glass* icon at right to access *Search Employees* dialog box.

   b. Enter name or part of it and click the *Search* button.
c. Select ID and Name of appropriate employee.
d. Click **Proceed with Selected Employee** button

e. Click **Continue** button

NOTE: You will receive message that you have added additional approvers and view the list of Assistantship(s) initiated.
Tracking an Existing Assistantship

1. Click on **Track Assistantship** link from left Navigation Pane.

2. Enter the applicant’s **UNC Charlotte ID** and click **Search By ID** button.

3. **Or** Enter the applicant’s **Last and First Name** and click **Search by Name** button.

4. Select radial button next to name of intended person.

5. Click **Proceed With Selected Person** button.

6. Select radial button for the appropriate assistantship.

7. Click **Proceed With Selected eGA** button.

**NOTE:** Click **Cancel** if you do not want to proceed.
8. View tracking information
Approve or Disapprove Assistantships

1. Click on **Approve Assistantships** under **Assistant Navigation** from left navigation pane.
2. Select the applicant awaiting decision by clicking the on green check.

For Graduate School

3. Select status from drop down menu from Graduate School Approval Menu.
   a. To accept, select **Contract Accepted – Send To Human Resources**.
   b. To decline, select **Contract Not Accepted By Student**.
4. Enter **Accept/Decline Note**.
   NOTE: This is a required field for decline and acceptance.

5. Click **Process Status** button.
6. Click *Submit Changes* button.

**HR Approval/Disapproval**

1. Click on green check for applicant awaiting approval (e.g. pending) 

2. Click *Click Here To Process Application To EPAF* button to approve application.
3. Or to disapprove application, expand **Disapproval Menu**.
   a. Enter Disapproval Reason.
   b. Click **Disapprove Application** button.

NOTE: You will receive a message indicating the assistantship has been disapproved.

**Correct Application**

The **Correct Menu** allows you to route the application back to previous approver for corrections without having to re-create the entire application.

1. Expand Correction Menu.
2. Enter Correction Reason.
3. Click **Submit For Correction** button.
Supersedes Approval/Disapproval

1. Select the applicant awaiting decision by clicking the on green check.

2. Select Approve eGA Application or Disapprove eGA Application.
3. Click Approve/Disapprove Application button.
   NOTE: The Approval/Disapprove Note is required for applications being disapproved. You will receive a message indicating the assistantship has been disapproved.
Revise Assistantship

1. Click on **Revise Assistantship** link from left navigation pane.

2. Enter the applicant’s **UNC Charlotte ID** and click **Search By ID** button.

3. Or Enter the applicant’s **Last and First Name** and click **Search by Name** button.

4. Select radial button next to name of intended person.

5. Click **Procced With Selected Person** button.

6. Select Student Assistantship you want to revise.

7. Click **Procced With Selected eGA** button.

8. Make revisions to assistantship application.
9. Click **Preview Approvers** button to verify information on screen and view approver list.

10. Or Click **Revise Assistantship** button to submit revisions.

11. Click OK button.
   NOTE: You will receive a message indicating eGA Application Successfully Revised.
Supersede Assistantship

Supersedes provide an avenue to make revisions after they have been full processed (e.g. already sent to and processed in the Graduate School (GR) and Human Resource Department (HR)). Supersede are able to terminate and create new EPAFs.

1. Click on **Supersede Assistantship** link from the left navigation pane.
2. Enter the applicant’s **UNC Charlotte ID** and click **Search By ID** button.
3. Or Enter the applicant’s **Last and First Name** and click **Search by Name** button.
4. Select radial button next to name of intended person.
5. Click **Proceed With Selected Person** button.
6. Select Student Assistantship you want to supersede.
7. Click *Proceed With Selected eGA* button.
   NOTE: Click *Cancel* if you do not want to proceed.
8. Make changes.
9. Click *Supersede Assistantship* button.

10. Click *OK* button
    NOTE: You will receive the following message: eGA Application Supersede Successfully Created.
Reports

<table>
<thead>
<tr>
<th>REPORT NAME</th>
<th>REPORT DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiator Report</td>
<td>List all assistanships created by you</td>
</tr>
<tr>
<td>Approver Report</td>
<td>List all assistanships approved by you</td>
</tr>
<tr>
<td>HR Queue Report</td>
<td>Lists all the assistanships in the HR Queue</td>
</tr>
<tr>
<td>Student Profile Report</td>
<td>Lists graduate assistantship profile by student</td>
</tr>
</tbody>
</table>

To view all reports, excluding the Student Profile Report, perform the following instructions:

1. Click on Reports from left navigation pane.
2. Click on Open or Save.
3. Click Yes to open doc in excel as trusted source.
4. View report.
To view the Student Profile Report, perform the following instructions:

1. Go to the **Reports** section from left navigation pane.

2. Click on the **Student Profile Report** link.

3. Enter the applicant’s UNC Charlotte ID you want to view the student profile.

4. Click **Generate Report** button.

5. Click **Open** or **Save** button.

Workflow Process

Create Assistantship

Revisions

Dept/Bus Off Approvals

GR Approvals

HR Approvals

Supersedes

Revisions

Corrections

Revisions

Override

Corrections

Revisions

Override