www.baylor.edu/bearquest

Helpful numbers:

• BearQuest questions
  Stephanie Kilgore  254-710-8462

• Human Resource/Compensation and Benefits questions
  Human Resources  254-710-2000

• Budget questions
  Budget Office  254-710-2663

What is BearQuest?
BearQuest is a request management tool that helps Baylor by streamlining certain processes such as construction requests, personnel requests, requests for funding allocations, or changes to course curriculum.

What does BearQuest mean to me?
As an end user in BearQuest, you will be asked to complete certain tasks, such as submitting a request for a new position in your department or perhaps requesting to remodel your department’s conference room. The BearQuest system automates and streamlines this process for you, giving you complete visibility from your original submission, to your manager’s approval, to the acknowledgement that your request has been reviewed by departments such as Human Resources or Budget. There are essentially two roles in BearQuest: (1) individuals that enter requests and (2) individuals that review requests.
**Review schedule**

This schedule can be found online at the chair resource center website: www.baylor.edu/crc/review_schedule

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<td><strong>Budget Review</strong> – 1&lt;sup&gt;st&lt;/sup&gt; week of April</td>
<td>Before spring break</td>
<td>Any non-personnel increases to budget lines. Works in conjunction with budget prep.</td>
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<td><strong>Spring Review</strong> – end of January</td>
<td>Before Christmas break</td>
<td>Any request for a university allocation other than faculty positions.</td>
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<td><strong>June Review</strong> – 2&lt;sup&gt;nd&lt;/sup&gt; week of June</td>
<td>April 30&lt;sup&gt;th&lt;/sup&gt;</td>
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<td>April 30&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Any request for a university allocation other than faculty positions and staff reclassifications.</td>
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<td><strong>Fall Review</strong> – end of September</td>
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<td>Any request for a university allocation other than faculty positions.</td>
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Go to URL: www.baylor.edu/bearquest

Start a request:
- Choose a request type
- Enter a name

Complete request overview

Complete request justification (if needed)

Complete EMS (if needed)

Complete budget form (if needed)

Release for review

Check Status
Navigating in BearQuest

Home

When you log in to BearQuest (www.baylor.edu/bearquest), you will come to this Home page.

The home page, or portal environment has two major areas:

Navigation

Workspace

Navigation Pane

1. Start A Request – Click here to start a new request.
2. My Requests – This takes you to the list of requests you have submitted. Use this to check the status of your various requests, add or review comments and/or attachments, review information you entered into the various BearQuest forms or into EMS.
3. My Tasks – This takes you to either a list of tasks that are waiting for you to complete OR that you have already completed.
Workspace

The Workspace pane in the portal is dynamic. As you select items within the navigation pane, the workspace will display new tabs for you to interact with.

When you log in to BearQuest, you will see a tab in the workspace area labeled Baylor Portal. There are 3 sections on this tab:

1. **System Messages** – Displays the latest announcements/helpful information.

2. **My Latest Open Tasks** – Displays the five most recent tasks that are open for you to work on. Click on the icon to open and complete a task.

3. **My Submitted Requests** – Displays the five most recent requests that you personally have submitted for review. Click on the View icon to open the request and see more detail.
Workspace

The Workspace pane in the portal is dynamic. As you select items within the navigation pane, the workspace will display new tabs for you to interact with. To select an item, click on either the **Open** or the **View** icon.

1. **ID-number and name** – The unique number assigned to your request and the name you give your request at the beginning of a process.

2. **Status** – This shows you the current status of the request. (For a summary of the approval path for each type of request see the appendix.). Once you have released your request for your review, this is the place for you to check to see where it is in the process. You won’t get an e-mail until it is approved or otherwise decided upon.

3. **Process** – Displays the type of process of that particular request.
Requests

What is a request? A request in BearQuest is simply a process that you have initiated. There are currently two different request categories that we use at Baylor: Personnel and Resource Allocations and Course Action.

Click on My Requests in the Navigation pane to see a new tab within your workspace that contains a listing of all the requests that you have initiated within BearQuest.

1. View Icon – Click on this to open your request and see more details about your request, such as the Request Detail tab, Flow View, and Comments.

2. All My Requests/In Progress/Completed – These options allow you to further refine your requests. All My Requests shows you a list of all the requests you personally have initiated. In Progress will show you a list of requests that have NOT received all of the necessary approvals and are still pending within the BearQuest system. This means that somewhere within BearQuest there are remaining open tasks. Completed will show you a list of all of the requests you have submitted that are no longer pending within BearQuest.

3. Status – Again, this shows you the current status of the request. (For a summary of the approval path for each type of request see the appendix).
Requests (continued)

Once you start a new request in the system, depending on how that process has been defined you will most likely be required to complete forms, detailing your request.

After you complete your task or request, BearQuest allows you to view the details of your request (or any other request you have started) at any time.

The detail for any request you have initiated will contain information such as when the request was started or completed, dates and times of each task starting and completing, the individuals assigned to a task, etc. Additionally, it contains a graphical Flow View of the entire process and an area to add additional comments, send emails, upload attachments, etc.
Tasks

A task represents a unit of activity or work within your process where an action is required of you. The task is associated with a request that has been started. A task can be completing a form, an approval, an email notification to a user or group of users, a milestone, or any other action that looks for your input.

Often, you will receive an email notification for a task that you need to complete. The email will contain a link to your task. Otherwise, you can always find your tasks from within BearQuest. The navigation pane will contain a link to My Tasks. To further refine your tasks, click on Viewing.

1. My Tasks – Shows you a list of all of your tasks.

2. My Open Tasks – Click here to see all of the tasks that are open for you to work on.

3. Completed Tasks – Click on Completed to see a list of all of the tasks you have completed in the past.

4. Open Icon – Click here to open and complete your task.

Note: We are NOT currently using the “My Past Due Tasks” option so you may disregard this option.
Searching for a Request/Filters
To search for a particular request, you can optionally select columns and sort them just by clicking on the column heading. You can also use the Search option within each menu. The following is an example of using the Search option within the My Tasks menu. Here, you can search by Task, Task Type, Request ID, or Requester. Other options are available in the My Requests menu.

After you enter your criteria, hit enter or click search and only the request that you searched for will be displayed.
Request Detail

Get to this page by clicking the View icon of a request. The **Request Detail** tab displays all of the information concerning a given request of a process such as the name of the person who initiated the request (the Requester), the person who a request was submitted on behalf of (the Client), the date a request was started, the current status of a request, etc.

Additionally, for each task that has been started or completed in a request, an entry will be made in the **Task History** section of the **Request Detail** tab. The **task history** provides a detailed overview of every aspect of the request as it is executing such as who is assigned to a task, who completes a task, dates/times tasks are completed, even the data associated with a task as it is completed such as answers on a form.

Click on **View Form** or **Formatted View** to see the form that was completed.

1. **Requester** – the person who initiated the request.
2. **Client** – the name of the person who a request was submitted on behalf of.
3. **Formatted View/View Form** - Click here to see the information that was entered into the form. Very useful for reviewing information from requests that are no longer open tasks for you.
Adding/viewing comments and attachments

At almost any point during the BearQuest process you can add comments or attachments to your request, even after you have released it for review. You can also share those comments or attachments with other users.

The Discussion area lets any individual that is associated with the request (assigned a task to complete, received an email notification, etc.) add additional comments, attachments, and even send email. Any comments that are added will be associated with this one particular request in BearQuest.

To begin, click on the “Discussion” tab.

Type important information into the first box you see in this area (where “Additional Justification” is shown above). Before typing in this area, the box will show “Say Something”).

- Click the “Attach A File” icon to browse for documents on your machine to attach in BearQuest.

- Click this icon to send email notifications to a user or limit users who can view your post.

- Click the “Post” icon to post your comment in BearQuest.
Notes on Using the *Share With Others* Option…

You have two options within this menu: You can either use BearQuest to send an email to a user OR you can limit your comments to be viewed by a certain person or group of individuals.

Once you send an e-mail through BearQuest by using the “Notify These Users” checkbox, you will not have a record of to whom it was sent.

When you send an e-mail to someone through the BearQuest system, it will create a task on his/her task history related to this request. This will give him/her access to the full request summary of the request with which the e-mail is associated. Be aware that you may be sharing confidential data. If you do not want to give your recipient access to this data, send your e-mail via Outlook or some other system outside of BearQuest.

When selecting recipients for your email, enter the name of the person you wish to search for in the *Search Text* field and click the magnifying glass. Enter as much of the name as you know. Once you see your recipient, click on their name. Repeat, if necessary for multiple recipients. Once complete, click “Save”.

There may be times when you would like to add a comment to a request, but you do not want to share it with everyone who has access to the request. In that case, mark the “Share Only With These Users” checkbox and select the appropriate recipients.
Making a Proposal in BearQuest

Example: Personnel and Resource Allocation - Staff Supplemental Pay

Log in to BearQuest by going to www.baylor.edu/bearquest

On the Home/Baylor Portal screen click on Go To dropdown menu on the top right side of your screen or use the short cut at the top of your navigation pane on the left side of your screen.

Choose your Process category (Personnel and Resource Allocation or Course Action). In our example, we are submitting a request for Supplemental Pay, so we would choose Personnel and Resource Allocation, followed by Medium Personnel Request.
Tips:
• Select your request type carefully – if you pick the wrong one, you may have to start over.
• You can do simpler personnel requests within more complex request types, but not the other way around.
• If you are planning to do several different personnel actions at once, choose the most complex request type (not generally recommended).
• If you are not sure what type of request to pick please call Human Resources (x2000). It is much easier to do it right the first time than to try to correct it later.
• Handle separations promptly – Whatever other personnel actions you are doing – always handle separations promptly. Do not “hold” them while waiting to submit other, related requests.
After you have chosen your request type, the New Request tab will open in your Workspace. The new tab contains key information concerning your request such as: the ID number, the name of the process you are starting a request for (Medium), the category of the request type (Personnel and Resource Allocation), a description of the request type, the name you will enter for easier tracking, and the option to submit the request on someone else’s behalf.

Enter an appropriate name for your request according to the naming convention.

Tips:
• Use the appropriate naming convention for your request. This makes it much easier for the reviewers to keep all the requests straight. The naming convention typically used is School-dept-project (A&S-Rel-New testament professor). Or department – project (POD- office renovation). (See the appendix for more detail on naming convention.)
You have the option to submit your request on someone else's behalf. You can use the magnifying glass to search for another individual. For example, you supervisor would like for you to submit this request for supplemental pay on his/her behalf. You can select his/her name here and it will be tracked within BearQuest that the request is submitted on his/her behalf by yourself. Both of you will have access to the request. You do not have to submit a request on someone's behalf if they are already part of the review chain. This is an optional feature typically used when a person might not have access to a request, but needs to be able to view it for one reason or another.

When you have finished entering the necessary information on this screen, click the Start Request button to begin.

**Tip:**
- As long as you have NOT clicked the Start Request button, your request has not started. If you change your mind about something, just close the New Request tab in your workspace and nothing will be recorded in BearQuest.
Complete the information requested in the “request overview” screen. Select the appropriate academic chair or department manager from the list. Then select the appropriate school or division from the list. When you have completed all the information – click on "submit."

Tips:
- You can change the name of your request at this point if you would like. A unique name is helpful.
- If you are academic chair or department manager you do not need to select yourself from the list. Leave this choice blank, and your requests will be forwarded directly to your Dean or VP as appropriate.
- If you want to save your work and come back later, click “save a draft.” When you are ready to resume work, find the request in your “open task” list.
- Submit saves the data you have entered and moves the request to the next task. **There is no going back and changing something once you have clicked “submit.”**
- Don’t click submit twice.
- Be aware of times when “submit” means your request will be released for review. This is usually at the completion of the budget form, but for simple requests it is at the completion of the EMS link.
- “?” = help
This screen is your link to the Employment Management System (EMS). Click “Go to EMS.”

Tips:
• When you click “Go to EMS” you will be opening a new browser window.
• Be careful – if you click “submit” before going to EMS, you will by-pass EMS.
You have now opened a new window and you are in EMS.

Select your department name from the drop down list. Enter your TRAX Departmental ID (no hyphens or spaces).

**Tip:** If you type in the first letter of your department name it will shorten your scrolling time.
Select “faculty” or “staff” as appropriate – in this case “staff.” Select the appropriate personnel action – in this case “Supplemental pay – staff.”

**Note:** You will only see the personnel actions that are available to you based on the request type you selected in BearQuest. If you don’t see the action you need, you may have selected the wrong request type. You will need to start over with a new request.

Enter the Baylor ID number for the person who is to receive the supplemental pay. Then click “next.”

**Tip:** Be sure to put the ID number if you can – there are sometimes several people with the same name or people don’t “go by” their legal names. Make the effort to get the ID number. If you can’t get it, or if the person doesn’t have a Baylor ID yet, enter the person’s legal name.
Enter the appropriate compensation information including the reason for the supplemental pay. Be sure to click the appropriate box to indicate whether any of the money for the supplemental pay comes from a grant or not. Then click “next.”

**Remember:** Supplemental pay is only appropriate for salaried Baylor employees. Hourly employees should fill out a time card for extra hours so that overtime may be calculated appropriately. Non-Baylor employees should be paid either as vendors through a voucher (if it is a one-time event) or as temporary employees.

If you are a new department click “yes” on this screen. If not (most cases), click “next.”
Select the account from which the supplement will be paid – in this case 915010. Then click “Save” and then click “next.”

If you want to split the payment between two accounts select “yes” and complete the appropriate information. If not (most cases) click “next.”

Enter the information about where the money is coming from to pay the supplement. If you know a position number – enter it – otherwise enter “unknown” or “na.” If you are requesting an allocation for the supplemental pay or if you plan to pay the supplement from a non-personnel account (9300), enter “0” in the amount field.

Once you have completed the fields click “update” and then click “next.”
Tip: If you plan to pay the supplement with something other than money from a personnel account – enter “NA” in Position number and “0” in the other fields. Then enter the funding source on the BearQuest budget form. Make a note of this in the “comments” box that follows.

Check the fields to make sure they are correct. Then click “next.”

Add any clarifying comments; then click “finish.”
You have finished your action in EMS. You may either add another action by selecting your department and your desired action, then clicking “continue.” Or you may close the EMS browser (most cases) by clicking “close browser.”
When you have closed the EMS browser window return to this screen in BearQuest. Click “submit” on this screen to proceed to the next task in BearQuest.”

**Tip:** “Submit” at this point will take you to the budget form – since this is a “medium personnel request” – but be aware if it were a simple request – you would be releasing your project for review. **Always read red notes on the screen.**
This is the budget information form.

Notice some fields are marked “(from EMS).” These are fields for which information has been copied from EMS for you. To make changes to these fields you will have to return to EMS. You may not make changes to those fields directly in this form. (For more information on how to return to EMS to make changes see the XXX section in this reference guide.)

You may enter information in the other fields as appropriate. When you have completed this form make sure you have selected “release for review” from the drop down menu. Then click "submit."

Tip: If you discover you have made mistakes in EMS, you can still correct them at this point by going back to EMS. To do so click on “review EMS requests.” Then read the instructions in red regarding how to proceed.

Note: Clicking submit at this point will release your request to the next reviewer. If you are not ready to do that, click “save draft” instead.

Tip: “Save Draft” at this point will allow you to save what you have completed up until this point. Any unfinished work (a request that has not been released for review) will now appear as an open task(s) for you.
When you have submitted a request for review, you will see this screen. It shows you the request number and the status of your request (pending departmental review). You can choose to view the forms or add comments or return perhaps return to the home screen to make a new request.
General tips for using BearQuest

• If you print things from BearQuest – you may need to experiment with your margins to find the right page size.
• Check your requests after you have released them – otherwise, you may not know if changes have been made by the various reviewers. (They should send you an e-mail, but it may be easy for them to forget.)
• Get in the habit of checking your Discussion tab.
• To delete a request (for example if you made a mistake and what to start over) send an e-mail with the ID number of the request you want to delete to stephanie_kilgore@baylor.edu.
• To find the ID number for a particular request quickly, look under All My Requests, or on any of the lists on the navigation pane.
• If you release a request for review and then realize you need to change something, you will need to contact the next reviewer and have them send the request back to you for revisions.
What if your request gets sent back for revisions?

Sometimes when you submit a request one of the reviewers/approvers will want you to change something and will send it back to you for revision. When this happens you will receive an e-mail something like the following.

---

You are being asked to revise the following request:

REQUEST SUMMARY

Request #: 653
Request Name: POD - New Training Specialist Position
Request Type: Complex Personnel Request
Requested by: Ashley Thornton
Current Status: Revise request to owners - 2/8/2008 8:31:31 AM

The reviewer who made this request should have entered revision notes at the time of his/her review. These revision notes will appear at the top of your Request Overview form for this request. This form will now appear again in the "My Open Tasks" section of your "My Dashboard" tab in BearQuest. Please go here to complete your revisions and submit the request again.

To view the details of this request including the task history and last reviewer who sent this request back for revision click the following link:

https://bearquest.baylor.edu/lurequest/dashboard/summary.aspx?instance_id=5d68a177-af57-4c78-b7e9-3e09423bcaef

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If you click on the link in the e-mail it will open BearQuest and take you to the task summary for the request in question. To make the change you will need to click on “My open tasks” and find the request in your open task list.

If you see a status of “Revise request to owners”, this means you have a revision to make.

Click on the Open icon to complete your task.
The comments from the reviewer will appear at the top of the request overview screen. To make revisions, click “submit” until you reach the form where you need to make your revisions. In this case the budget form.
Make the needed revisions, then click submit. The revised request will be re-routed through the appropriate reviewers.
Reviewing information you have already released for review

Once you have completed a form in BearQuest and clicked “submit” that task is no longer open to you to make changes – but you can view the information you have entered by going to the Request Detail tab.

You can get to the Request Detail tab by going to All My Requests and clicking the view icon for the request you would like to view.

For example, if you would like to see what you entered into EMS for this project go to “EMS link” and click “View Form”
This will take you to the EMS link form, where you can click “go to Ems.”

Which will take you back to the EMS browser where you can click on “show summary” to view – but not change – the information you entered in EMS.

You can use this method to view (but not change) any form that you have completed in your request even after it has been released.
Information for Reviewers

Receiving a review task

When a request is ready for your review, you will receive an e-mail similar to the one below. You can click on the link to go directly to the form to complete your task.

Tip: If you would rather handle several of your reviews at once instead of responding to individual e-mails. You can go to “my open tasks” at any time to see a list of all the requests that are waiting for your review.
When you click the link in your e-mail, you will go directly to the form which you need to review.

When you get to the end of the form, you will see your choices regarding the request. If you reject or send back for changes, be sure to include a note to the requestor explaining your reasons, or what changes are needed.

Complete Your Review for Release

***NOTE*** If you have made EIS Revisions and wish to see the changes before releasing, select Data Refresh as your review choice and click the Submit button at the bottom of this form.

Select review choice *

If you select "Back to Requestor" or "Reject":

Describe revision needed from requestor or reason for rejection.

An asterisk (*) indicates a required field.
General comments for reviewers

• Make sure your BearQuest e-mail is not going to junk.
• If you find you are getting an overwhelming number of BearQuest e-mails, you might want to set a rule to file them in a folder separate from your inbox.
• If you make a change to someone else’s request, please add a comment and send an e-mail to the requestor through BearQuest. Otherwise, they may not know of the change. This will also help keep a record of changes made.
• To see what the proposer entered into the Request Justification, go to “Request Summary.” In the completed forms section, click on the “View in Window” button next to “Request Justification.”

If you are a member of a reviewer group (such as a Dean reviewer group+), here are a few things you may want to keep in mind:

• Everyone in the group will get the e-mail notification that there is an open task.
• Once one person in the group takes action on the task it is closed to everyone else.
• If the request is “re-looped” at a later point in the review process, only the person who took action will get the notice of the “re-looped” request.
• To see which of the assigned people actually completed the task, go to the request summary for the task, then scroll down past the completed forms to the task history. Click on the “+” next to the applicable review step.
Appendices

• Naming convention
• Approval summaries
• Accessing BearQuest off campus
Naming

Naming convention – academic departments:
The naming convention for academic departments is “college-department-position”. For example, if the business law department in the business school were requesting a new ethics professor it would be “HSB-BL-Ethics Professor.” If the religion department were requesting a new Old Testament professor it would be “AS-REL-OT professor.” This naming convention will make it much easier to organize and manage the long list of proposals.

Preferred abbreviations for the schools:
• College of Arts and Sciences (AS)
• Hankamer School of Business (HSB)
• Honors College (HC)
• Louise Herrington School of Nursing (LHSON)
• School of Engineering and Computer Sciences (ECS)
• School of Education (SOE)
• School of Music (MS)
• School of Social Work (SWO)
• Truett Seminary (TRUETT)

Naming convention – administrative departments:
The naming convention for administrative departments is “department-position.” For example, if an area in ITS were requesting a programmer it would be “ITS-Programmer.”
Approval Path Summaries for Request Types

**Complex Personnel Request:** New faculty/staff, replacement faculty/staff, faculty/staff salary or classification change:
- Proposer releases for review
- Academic chair/Department Manager
- Dean/AVP review
- Comp and benefits
- HR
- EC
- Budget review
- VP for finance and admin review

**Construction Request:** Request for construction only
- Proposer releases for review
- Academic Chair/Department Manager
- Dean/AVP review
- Facilities Management
- D&C Services and/or Building Services for design and estimate
- Facilities Management
- Budget
- VP for Finance & Admin

If approved:
- Building Services for detailed estimate
- Facilities Management
- Financial Services
- Budget Office
- Building Services to prepare requisition

**Grant funded position request:** Personnel request for a position or positions funded by grants. *(Do you want to mention anything about C&B reviewing if no profile chosen?)*
- Proposer releases for review
- Academic chair/Department Manager
- EC
- OSP
- HR approval
Medium Personnel Request: Faculty/staff supplemental pay, staff transfer, faculty/staff title change, Staff hire temporary:
   • Proposer releases for review
   • Academic chair/Department Manager
   • Dean/AVP review
   • Comp and benefits
   • HR
   • EC
   • Budget review

Non-personnel/ non-construction request: Requests that contain neither personnel nor construction components.
   • Proposer Releases for Review
   • Academic Chair/Department Manager
   • Dean/AVP review
   • EC
   • Budget
   • VP for Finance & Admin

Simple Personnel request Faculty/staff separation, faculty/staff abolishment, faculty transfer:
   • Proposer releases for review
   • Academic chair/Department Manager
   • Dean/AVP review
   • EC
   • HR

Faculty Hire Request: Personnel request to hire an individual into an approved, existing faculty position:
   • Proposer releases for review
   • Academic Chair
   • Dean
   • EC
   • HR
Accessing BearQuest off-Campus

• To access BearQuest from an off-campus location – Use VPN. For instructions for installing VPN go to www.baylor.edu/its/VPN or call the Helpdesk (4357)