# PeopleAdmin 7

Level 2 Users' Guide:

Reviewing/Approving Position Requests,

Postings, Applicant Pools, and Hiring Proposals



This guide was written for use by Managers and Deans when reviewing and approving position requests and other items in the People Admin 7 system.

## **Introduction & Index**

Welcome to Eastern's online position and application system, **PeopleAdmin 7** ("PA7"). Just as with PA 5.8, we will use the PA7 system to create and submit position descriptions through approved channels, create postings, view applicants, and create hiring proposals. Note two key terminology changes:

Workflow: This term refers to how Job Descriptions, Postings, Applicants, and Hiring

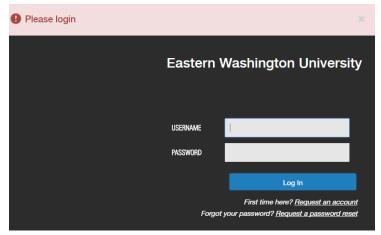
Proposals ("components") move through the system for review and approval.

State: Replacing the term "queue," this term refers to a specific workflow position that a

component is at; also referred to as workflow state.

## Logging In

New PA7 User URL: https://jobs.hr.ewu.edu/hr; after entering the URL, the login screen will appear:



Enter your username (same as your Eastern SSO username). Tab to the password field and enter your password. Your password upon initial login will also be the same as your Eastern SSO password.

If you forget your password, you no longer have to contact HR for a reset; instead, click the link shown in the screenshot, and the PA7 system will automatically reset your password to your username.

Press your keyboard **ENTER** key or click the **Log In** button. You will be taken to the home page.

NOTE: if you need to access the old PeopleAdmin 5.8 system, please do so at this url: <a href="https://pa565.peopleadmin.com/hr">https://pa565.peopleadmin.com/hr</a>

## Index

Once you've logged in, skip ahead to the page indicated below for step-by-step guidelines for reviewing and approving job descriptions, postings, applicant pools, or hiring proposals:

- ▶ Page 3 Quick Guide to reviewing/approving job description requests within PA7.
- Page 4 Job description requests how to find, review, approve.
- ▶ Page 6 Postings and applicant pools.
- ➤ Page 8 Hiring proposals.
- Page 9 Detailed overview of the Home Page
- ▶ Page 10 Detailed instructions on creating a Watch List provides a list of actions on your PA7 Home Page allowing you to easily find and track items as they move through the system.
- Page 11 Detailed instructions on searching within the system
- Page 14 Detailed description of Position Descriptions within PA7.

#### **Quick Guide for PA7 Level 2 Users**

This Quick Guide is intended to serve as an overview of the steps to follow when creating a new position description. As such, it does not contain detailed instruction. If you need more information about any particular step, refer to the more detailed pages in this Level 2 User's Guide (see below).

## Steps to Review and Approve a Position Description Request

Go to <a href="https://jobs.hr.ewu.edu/hr">https://jobs.hr.ewu.edu/hr</a> and sign in to PA7 using your Eastern SSO username and password.
Click on the title link in your Inbox on the Home Page; if the position isn't there, that means it hasn't been routed to you for approval.
Scroll down to review the position request; if you need to edit or add information, click the <b>Edit</b> link (towards the top of the Position Description header).
To approve and move the position forward, hover over the Take Action on Position Request button, and click the link for Send to HR Initial Review.
A Take Action box will appear. Click Submit to send the action to HR for further processing.

## **Postings and Applicant Pools**

Please note: as a Level 2 user, there are <u>no</u> system actions to take in PA7 for postings and applicants. If you wish to view a posting and/or applicants, refer to page 5 in this manual.

## Steps to Review and Approve a Hiring Proposal

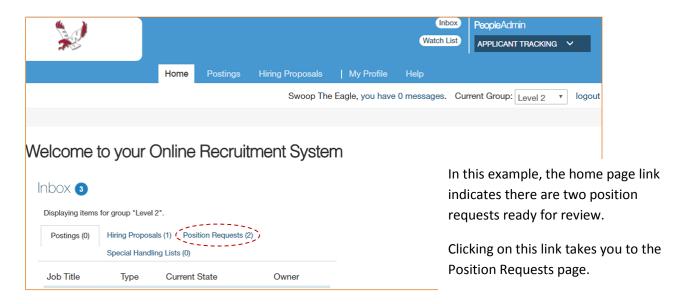
Go to <a href="https://jobs.ewu.edu/hr">https://jobs.ewu.edu/hr</a> and sign in to PA7 using your Eastern SSO username and password.
Click on the Hiring Proposal tab in your Inbox. If the hiring proposal isn't listed, that means it hasn't been routed to you for approval.
Click on the job title link to open the hiring proposal.
Scroll down to review; if you need to edit or add information, click the <b>Edit</b> link, edit or add information as needed, and click the <b>Save</b> button.
Click Hiring Proposal Documents (left panel navigation), or click the <b>Next</b> button.
Attach any needed documents relevant to the Hiring Proposal (budget plan, approval emails, etc.).
Click the <b>Save</b> button, and then click the <b>Next</b> button (or click Hiring Proposal Summary in left panel navigation).
Hover over the Take Action on Hiring Proposal button, and select Send to Vice President Review.

## Want More Detailed Information? Here's where to go within this Level 2 Users' Manual:

- ➤ Page 4 Job description requests how to find, review, approve.
- ➤ Page 6 Postings and applicant pools.
- ➤ Page 8 Hiring proposals.
- Page 9 Detailed overview of the Home Page
- ➤ Page 10 Detailed instructions on creating a *Watch List*
- ➤ Page 11 Detailed instructions on searching within the system
- ➤ Page 14 Detailed description of Position Descriptions within PA7.

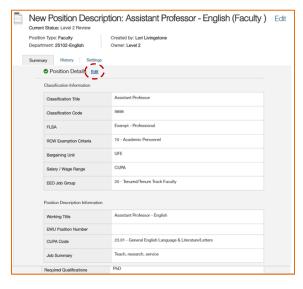
## Job Descriptions – How to Find, Review and Approve

After logging in, the Home Page provides easy access to all parts of the system. Although the default is to take you to the Applicant side of the system (blue banner at top), you can access the position requests by clicking on the link shown below:





Click on the Title link for the first position you wish to review.



Scroll down to review the position description. If you wish to add information, or to correct something, click the **Edit** link first, and then scroll to find the section you wish to edit.

When you're ready to move the position to the next level for approval, look for the Take Action on Position Request button in the upper right corner (click on it). You'll see three options as shown:



To move the position forward for additional approvals, click **Send to HR Initial Review**, and a **Take Action** box will appear as shown on the next page.

The Take Action box allows you to do three things:



- 1. You can add a comment (optional).
- 2. You can click the checkbox to add the position to your Watch list, so the position will appear on your Home Page under Watch List when you first login. This allows you to track the position from the Home Page without having to search for it.

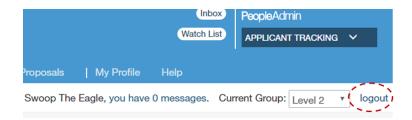


3. To move the position forward to the next level for approval, click the **Submit** button.



A banner will appear at the top of your screen confirming the position was successfully moved to the next level.

You may log out of the system now (look for the **logout** link in the upper right corner), or you can go on to the next action you need to take (if any).

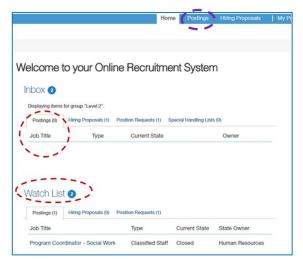


# **Postings and Applicant Pools**

## Please note: as a Level 2 user, there are no system actions to take in PA7 for postings and applicants.

When it is time for Level 2 users to review and approve an interview list, your HR Associate will contact you through email, and provide a spreadsheet list of applicants customized for easy viewing (just as we do today in PA 5.8). The spreadsheet will provide the information you need to ascertain the status of each applicant and reasons for why applicants are not selected for interview. You approve interviews by responding to the email.

However, you may view and/or download postings and applications within PA7. To perform these functions, start by logging in to the PA7 Home Page.



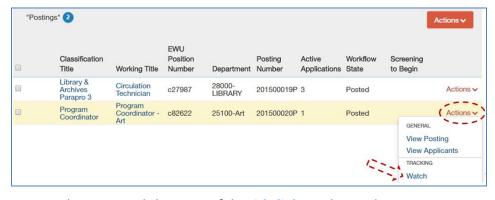
Since there are no defined system actions for a Level 2 user to take on postings and applicant pools, your Inbox for Postings will always be empty.

However, you may search for postings, and then add them to your **Watch List** to provide easy access to postings you are interested in.

See page 10 for detailed instructions on Watch List.

If you've already put a posting on your Watch List, then simply click on the posting link in the Watch List to open it.

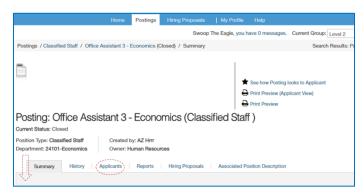
To search for the posting, hover over the <u>Postings tab at the top</u>, then select the type of position you're seeking (classified, exempt or faculty). Postings in your area will populate the screen as shown below.



To add a posting to your Watch List, hover over the Actions link for a specific posting, then select Watch.

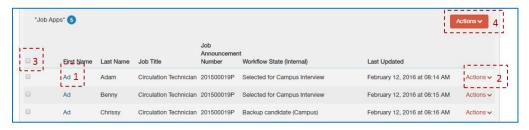
A banner will appear at the top of the screen, confirming the position was added to your Watch List.

To open the posting, click on one of the **title links** as shown above.



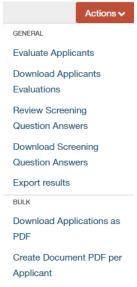
The posting will display a **Summary** page; scroll down to review the posting. Note there are no links for editing or taking action, since Level 2 users have no defined roles in PA7.

To view applicants, click on the **Applicants** tab.



Here are the things you can do when looking at a list of applicants as a Level 2 user in PA7:

- 1. Click on the link for an applicant's first name to open and view the application.
- 2. You may also open an application by hovering over the applicant's Action link, and select View Application.
- 3. You may download applications by first selecting one or more applications by clicking the checkboxes at the left of each applicant, or select the entire list of applicants by clicking the top box in the upper left corner of the banner, then hover over the Actions button (4), then select **Download Applications as a PDF.**
- 4. The Actions button displays several options. **However, please note:** there are no defined roles for a Level 2 user to take any of these Actions; they are system defaults. Explanations are provided for the menu options as a courtesy and for informational purposes only.

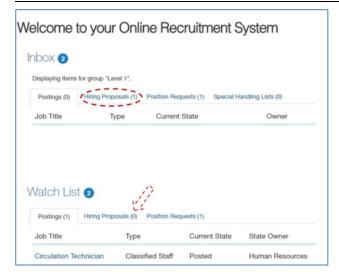


- ➤ Evaluate Applicants this activity is handled by the Search Committee; the evaluation process is not available to Level 2 users.
- Download Applicants Evaluations Level 2 users may use this option; it produces a spreadsheet showing how the various committee members evaluated the candidates at different stages in the search. Note: the resulting spreadsheet is cumbersome and not formatted for easy viewing; your HR Associate will send you the needed information at the time your approval is requested for interview pools.
- ➤ Review Screening Question Answers Allows Level 2 users to view how the individual applicants responded to application screening questions created as part of the posting; for example, verifying whether or not they have the required degree.
- ➤ Download Screening Question Answers Allows Level 2 users to download applicants' screening question answers.
- Export Results Allows Level 2 users to export a list showing what "state" the applicants are in; example: are they selected for interview, are they backup candidates, etc.
- Download Applications as PDF Allows Level 2 users to download the basic online applications, and/or any documents the applicant attached. The pdf will open automatically.
- Create Document PDF per Applicant Similar to the above action, but creates individual PDF documents per Applicant. Note that the pdfs do \*not\* open automatically; contact your HR Associate if you would like to learn more about this feature.

Contact your HR Associate if you have questions about postings or applicants within a posting.

As stated at the beginning of this section, when it is time for you to review and approve an interview list, your HR Associate will contact you through email, and provide a spreadsheet list of applicants customized for easy viewing. You approve interviews by responding to the email.

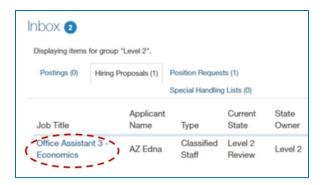
# **Hiring Proposals**



To review and approve a hiring proposal, login to your Home Page.

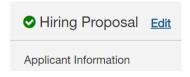
If a hiring proposal is ready for your review, it will be accessible from your Inbox on the Home page. Click the link for Hiring Proposals to view the item.

If a hiring proposal is in the system, but isn't in your queue, you can search for it, and then add it to your Watch List (in this example, there are no hiring proposals added to the Watch List).



When a hiring proposal has been routed to you, you will see it listed in your Inbox; click on the tab for Hiring Proposals; then click on the link under Job Title to open the Hiring Proposal; scroll down to review the terms.

If you need to edit any information, or add a comment to the Hiring Proposal, click the <u>Edit</u> link (appears once you open the Hiring Proposal):



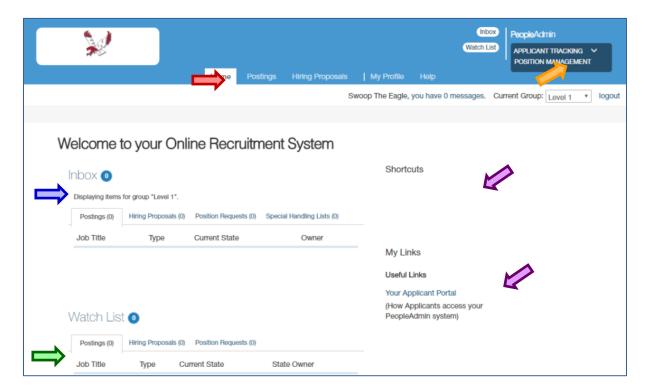
Save any changes you make (look for the **Save** button). While in Edit mode, you can scroll down and edit/add text in any open field. Additionally, you will see several options accessible through *left-panel navigation*:



- Notice you are in the "Hiring Proposal" as shown in the screenshot at left.
- ➤ The second line, Hiring Proposal Documents, includes multiple links to attach documents relevant to the hire, including:
  - Budget plan (how is the position being paid for)
  - Approvals (such as emails or memos)
  - Employment Terms and Conditions
  - o Form for Pre-Placement Physical if required for the position
  - Faculty Hiring Template (submitted in advance of the hire for tenure track searches)
- ➤ Hiring Proposal Summary takes you to an overview page.

Most important, if you edit the Hiring Proposal and/or attach documents, make sure you save while on the page, before navigating to the Hiring Proposal Summary page!! On the Summary page, hover over the **Take Action on Hiring Proposal** button, and you'll see two options: (1) Keep working on this Hiring Proposal, or (2) Send to Vice President Review. Select Send to Vice President Review when it's ready for the Level 2's review.

## **Home Page Overview**



This is the page you will see when you log in. It presents a dashboard that provides access to:

- → **Module selector,** drop-down box in the upper left corner, which allows you to switch between the two main system modules:
  - ➤ Applicant Tracking this is where you gain access to job postings, applicants and hiring proposals. This is the default module that comes up when you login; notice that the dashboard background color is blue as shown in the screenshot above.
  - Position Management this is where you review and approve job descriptions; when you're in this module, the dashboard background color is orange:



- Navigation bar, at the top, which has tabs to provide access to the main areas of the system. Since the system default is the Applicant Tracking section, you can access Postings and Hiring Proposals by clicking on those tabs as shown in the screenshot.
- → Inbox lists items that need your attention, such as items requiring your review and/or approval.
- → Shortcuts and links which you get to define.
- → Watch list, these are items you have specifically tagged to "watch" so you don't have to search for them when you login to the system.

## **Inbox and Watch List**



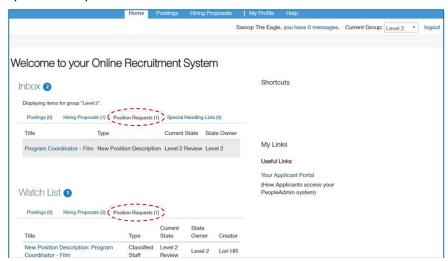
Every page in the system will present links for your Inbox and Watch List in the upper right corner

The **Inbox** includes tasks that you are authorized to act on. Your inbox will not include items that are currently assigned to other people - for example, items that

have not yet reached you through the appropriate workflow, and items that you have already acted on.

The Watch List allows you to follow the progress of items that matter to you. By default, your Watch List includes all items that you create. You can also add items to watch. Items are automatically removed from your Watch List when they are completed or canceled. As with the Inbox, the home page presents a limited view of your Watch List.

If you own an item in its current state – if you are responsible for the next task, or able to carry it out – you can open it from your Inbox or Watch List.



When you first login to your Home Page, your Inbox and Watch List will be displayed.

Notice that both Inbox and Watch List have *tabs* to click to see specific items.

In this screenshot, the Position Requests tab has been clicked for both the Inbox and Watch List.

If there are only a few items in your Inbox and/or Watch List for the tab you have selected, then the entire list will be displayed on the Home Page. However, if you have many items you are tracking, you will only see a partial list. Access your entire Inbox or Watch List by clicking the title (i.e., click either Inbox or Watch List).

To work with items from your inbox or watch list from the Home Page, simply select an item to open it. If you own the item, the **Take Action** button is available. This control is customized to show the name of the item - for example, **Take Action on Position Request**. From the Take Action menu, select the appropriate action.



To start watching an item, locate the item of interest (i.e., search for it), hover over the Actions link, and select **Watch**.

To stop watching an item, locate it in a search, hover over the Actions link, and select **Stop Watching**.

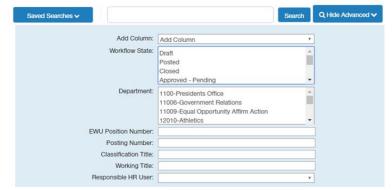
## **Searching in PA7**

### **Basic Search Tips and Search Filters**

When using the search feature, PA7 will search all text fields that you have access to.

For example, if you search for John Smith in the Applicant Tracking module, it will return results found in fields for applicant name, supervisor, reference or other fields associated with Applicant.

## **Classified Staff Job Postings**



You can narrow search results through the use of *filters*. Filters make it easier to find the specific PA7 record you are seeking. Dedicated filters reside on specific system pages within both the position management and the applicant tracking modules.

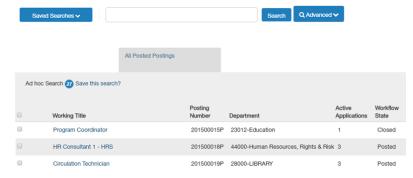
This example shows the filters that reside on posting pages; you can hide these filters by clicking on the **Hide Advanced**  $\nabla$  tab.

Some filters contain a menu of options to scroll through and select for filtering, whereas other filters are open text fields. If the available filters are insufficient for narrowing your search, you can also use the **Search** field at the top of the filters list.

#### Types of Searches (Global, Group, Personal)

Filters only function as a screening mechanism to help you find the specific record you are seeking, but they do not generate the columns of data that will appear on your screen once you click the **Search** button. To display the desired columns of data when you search, you may select from dedicated Global Searches or Group Searches (which HR creates), or Personal Searches that you create and save. Or, you can select a saved search and then modify it to display the columns of data you wish to see (and then either save the modified search as a new personal search, or discard the search when you are through using it).

Global standardized searches have been established for each system page. These may be found by clicking on the **Saved Searches** tab. For postings, the column headings shown below are the result of the search called, **All Posted Positions**, which has been saved as a global search for postings:



As you can see at right, this global search displays Working Title, Posting Number, Department, number of Active Applications, and Workflow State for each posting.

For this example, the results were also *filtered* to only show Posted and Closed positions.

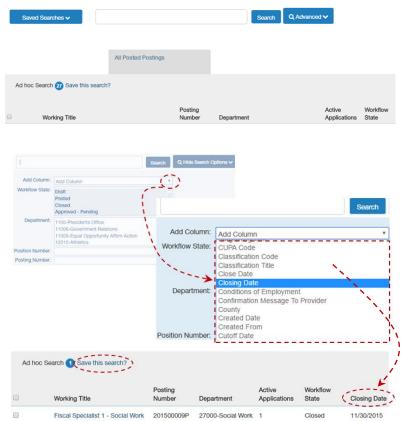
## **Modifying Existing Searches**



Let's suppose you want to modify what is displayed on your screen after running a search. By hovering over the column header, controls show up which allow you to:

- Move the column left or right in the display,
- o Sort column data in alpha-numeric or reverse order, or
- Delete the column.

These changes to a search are temporary, unless you save the search as a new *personal* search.



Let's suppose you want to add another column to a search, for example, you want to know the closing date for postings.

First, if you hid the filters, un-hide them by clicking the tab for Advanced 

and then you'll see all of the pre-defined filters.

Click the arrow to display the drop down menu of columns available for the page you are located on, then scroll and click any column(s) you wish to add to the search.

The system will automatically add the column to the display.

See the next image for the display results after adding a column for closing date.

Remember, you can save modified searches by clicking on the link for *Save this search?* and then name your search and save it as a personal search.

If you want to make a search your *default search* so that it populates your screen whenever you visit that page within the system (i.e., the posting page, or job descriptions page, etc.), click on **Save this Search** button, enter a name for the search, select Personal Search, then click the radio button for **Make it the default search?** The customized search has now been saved. You can create multiple saved searches, and to access them, just click on the tab for **Saved Searches**  $\triangledown$ , then scroll and select the search name to view that particular search.

## Additional Helpful Search Tips

- Text search is not case sensitive.
- Searches start from the start of a field towards the end of a field; it does \*not\* allow you to search for a word or fragment in the middle of a field. For example, if you're searching for the position *Office Assistant 3 Economics*, and you enter "econo" in the search box, the system will \*not\* find this position. You would need to enter text starting at the beginning of the field; i.e., *Office Assistant*.

- Enter whole words or use the \* character as a "wild card". For example, if you are looking for Janice MacCullough's profile but you are not sure how to spell her name, you might enter jan\* (which will return all names that start with the letters Jan) or \*ccull\* (which will return all names that contain that string of letters). You must supply at least three letters in a row for any search that uses the wildcard character. Note the wild card function does not work in the sandbox environment.
- To search for a phrase that contains a dash or a space, enclose the entire phrase in quotation marks: "director mba"
- Searches normally return items that contain all your search terms. For example, if you enter facilities manager, the search returns items that contain both these words.
- To exclude search results, use the ! or character. For example, to search for postings that contain the word "director" but not "coordinator", enter director !coordinator or director -coordinator.
- To search for one or more out of a set of search terms, use the | (vertical bar) character. For example, to search for postings that contain either of the words director or coordinator, enter director | coordinator.
- You can't do a search that only specifies what not to return, such as !coordinator.
- You can't do a search for a word or phrase that was selected from a drop-down list, such as the name of a state, but you can use *filtering* to find the information.

Comment to Level 1 persons, who are conducting system testing as a Level 2 user: the search functionality described above doesn't always return the expected results. We are working with PeopleAdmin to correct issues with searching.

#### **Resources – Who to Contact**

Your primary contact for PeopleAdmin 7 questions is your designated Human Resources Associate:

- → Lori Livingstone: Academic Affairs Colleges and the Library; llivingstone@ewu.edu; x6931
- → Kim Davis: Business & Finance, University Advancement, President's Office; kdavis2@ewu.edu; x6904
- → Saundra Godin: Student Affairs, IT, and academic units not associated with a College, such as Grants; sgodin@ewu.edu; x4681

## **Position Descriptions**

#### Introduction

Just as in PA 5.8, the position description is used to describe the key responsibilities of the position and its qualifications. Without a good, up-to-date position description, it is unlikely that the best candidate will be hired for the job; and/or employee performance will meet your expectations. A complete and approved position description is required whenever any of these personnel activities are needed:

- → Prior to recruitment (posting jobs to Eastern's site and subsequent external advertising)
- → Prior to hiring persons on a waived recruitment basis
- → Prior to reassignment of current employees into new positions
- → Following completion of an employee initiated job audit
- → Following completion and approval of a management initiated position reclassification

## Workflow (How Positions are Routed for Review and Approval)

Once a new position is created at the Department level, or an existing position is updated, the position will be routed through successive workflow states allowing required approvers to review and approve the positions. Positions are approved by moving them "down" the list to the next workflow state.



#### Workflow Notes:

Level 1 is shown as the position which initiates position descriptions, simply because this is the type of system user who most commonly handles this activity.

However, Level 2 and HR users may also initiate position descriptions.

If a workflow state doesn't apply to a position, it may be skipped.

You may see where in the workflow a position or hiring proposal is at, by clicking on the History tab within the item you are tracking.

### **Overview of the Position Description Page**



After logging into to PA7, switch to the Position Management module in the top right hand corner.

Then move to the top middle of the page, and click on the tab for Position Descriptions to display the available options.

In the drop-down menu, you will see separate links for position descriptions and for <u>position requests</u> for each type of university employee. Select the <u>position request</u> option corresponding to the position you need to review and approve (Classified, Faculty or Exempt).

The other options allow you to review position descriptions that have already been fully approved. Note that we are \*not\* using PA7 for temporary (NSH) positions at this time; these menu options are placeholders for future functionality.

#### **Your Web Browser**

This system is designed to run in a web browser over the internet. The system supports browser versions of Internet Explorer 7 and later, Mozilla Firefox version 5 and later, Apple Safari version 4 and later, and Google Chrome. However some of the older browser versions are less powerful than the newer versions, so the appearance of certain screens and printed documents may be slightly askew. Please contact your designated IT professional (or place a Help ticket) if you experience significant issues in accessing and viewing within the system.

The site also requires you to have Adobe Acrobat Reader or other .pdf software installed. Acrobat Reader is a free download available at http://www.adobe.com.

## **Security of Applicant Data; Automatic Timeout**

To ensure the security of the data provided by the applicants, the system will automatically log you out after 60 minutes if it detects no activity. However, anytime you leave your computer we strongly recommend that you save any work in progress and logout of the system by clicking on the logout link located in the upper right-hand side of your screen.