

PeopleAdmin 7

VP Users' Guide:

Reviewing/Approving Position Requests,
Postings, Applicant Pools, and Hiring Proposals



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

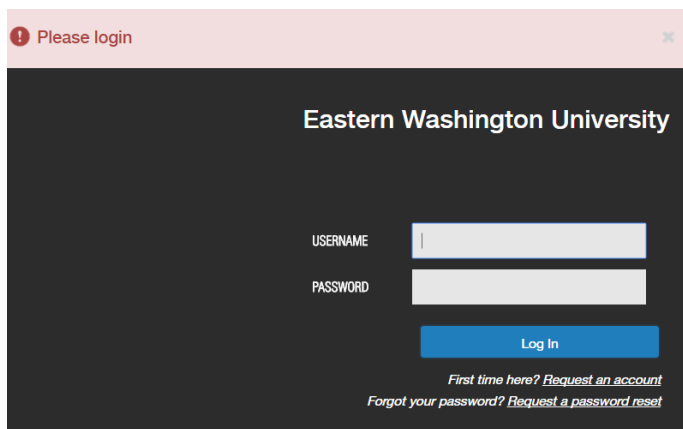
Introduction & Index

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

PeopleAdmin 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. You’ll be prompted to change the password when you first login.

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, within the **Position Management** side of the system (orange banner across the top of the screen).

An **Index** to this user’s guide is provided on the next page. A quick guide to reviewing/approving job descriptions is provided on page 4.

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 4 – Quick Guide to reviewing/approving job description requests within PA7.**
- Page 5 – Job description requests – how to find, review, approve.
- Page 7 – Postings and applicant pools.
- Page 9 – Hiring proposals.
- Page 10 – Detailed overview of the Home Page
- Page 11 – 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 12 – Detailed instructions on searching within the system
- Page 15 – Detailed description of Position Descriptions within PA7.

Quick Guide for PA7 VP Users

This Quick Guide is intended to serve as a reminder 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 VP User's Guide (see below).

Steps to Review and Approve a Position Description Request

- Go to <https://jobs.hr.ewu.edu/hr> and sign in to PA7 using your Eastern SSO username and password.
- Click on the link for **Position Requests** in your Inbox on the Home Page; if the Position Requests inbox is empty, that means there aren't any positions waiting for your review and approval.
- If you see a position listed, then click on the title link to open the position request.
- Scroll down to review the position request; if you need to edit or add information, click the **Edit** 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 VP user, there are no system actions to take in PA7 for postings and applicants.

If you wish to review a posting and/or applicants, refer to page 5 in the detailed VP Users' Guide.

Steps to Review and Approve a Hiring Proposal

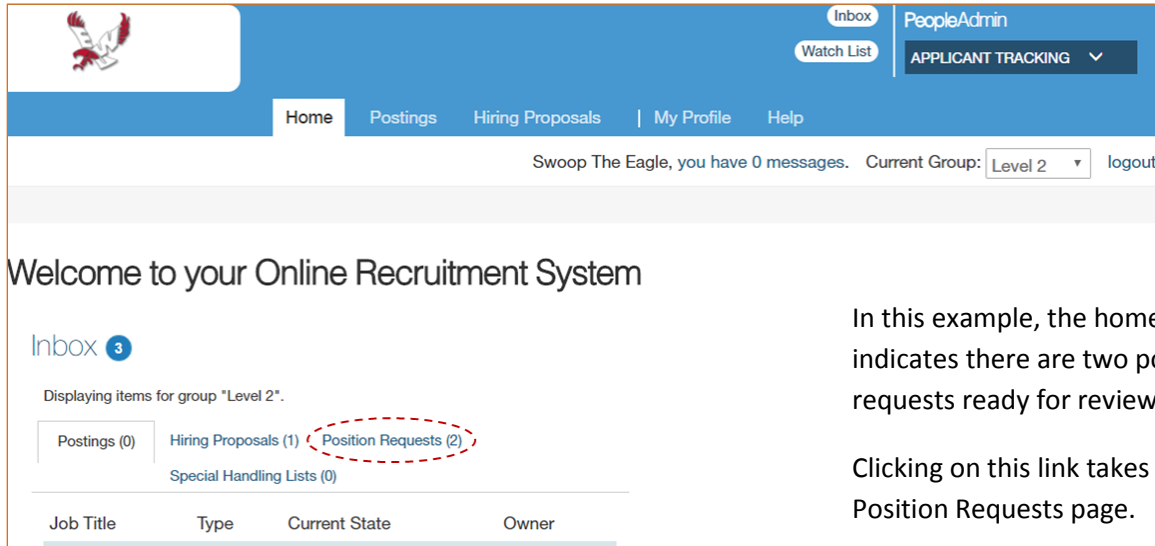
- Go to <https://jobs.ewu.edu/hr> and sign in to PA7 using your Eastern SSO username and password.
- Click on the Hiring Proposal tab in your **Inbox**, then click on the job title link to open the proposal.
- Scroll down to review; if you need to edit or add information, click the **Edit** link, edit or add information as needed, and click the **Save** button.
- Click Hiring Proposal Documents (left panel navigation), or click the **Next** button.
- Attach any needed documents relevant to the Hiring Proposal (budget plan, approval emails, etc.).
- Click the **Save** button, and then click the **Next** button (or click Hiring Proposal Summary in left panel navigation).
- Hover over the **Take Action on Hiring Proposal** button, and select one of these options: **Send to President Review** (required when hiring direct reports to a VP), or **Send to Budget**.

Want More Detailed Information? Here's where to go within this VP 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.

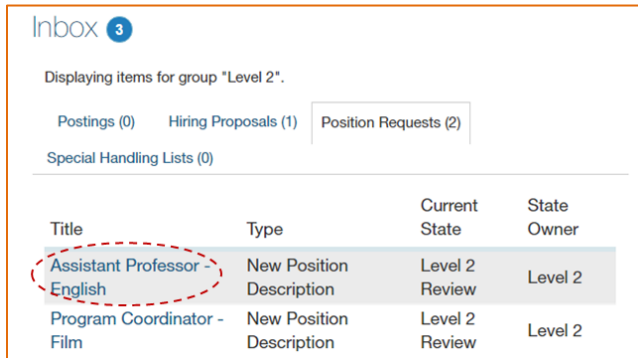
Job Descriptions – How to Find, Review and Approve

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:

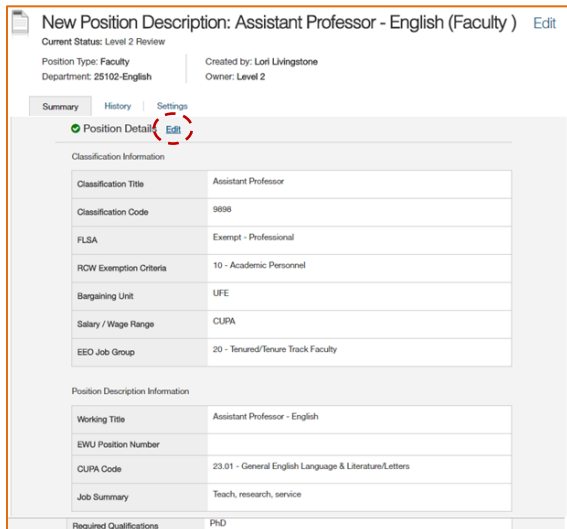


In this example, the home page link indicates there are two position requests ready for review.

Clicking on this link takes you to the Position Requests page.



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



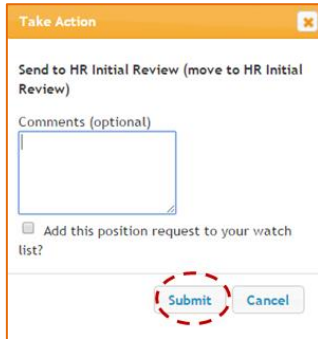
Scroll down to review the position description. If you wish to add information, or to correct something, click the **Edit** link first, and then scroll to find the section you wish to edit.

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. You'll see three options as shown here:



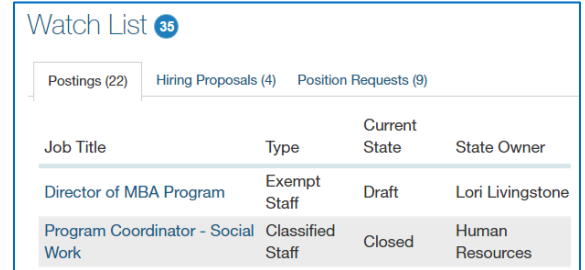
To move the position forward for additional approvals, click **Send to HR Initial Review**, and a **Take Action** box will appear as shown on the next page.

The **Take Action** box allows you to do three things:



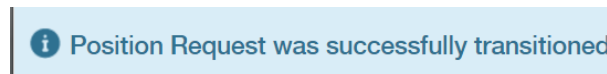
1. You can add a comment (optional).

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.



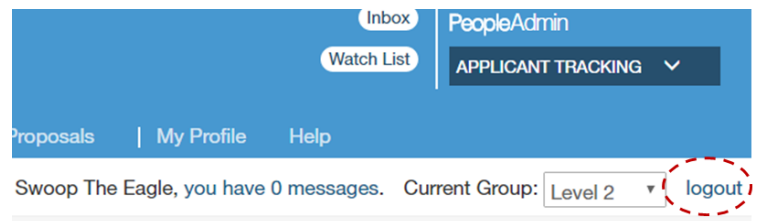
Job Title	Type	Current State	State Owner
Director of MBA Program	Exempt Staff	Draft	Lori Livingstone
Program Coordinator - Social Work	Classified Staff	Closed	Human Resources

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).

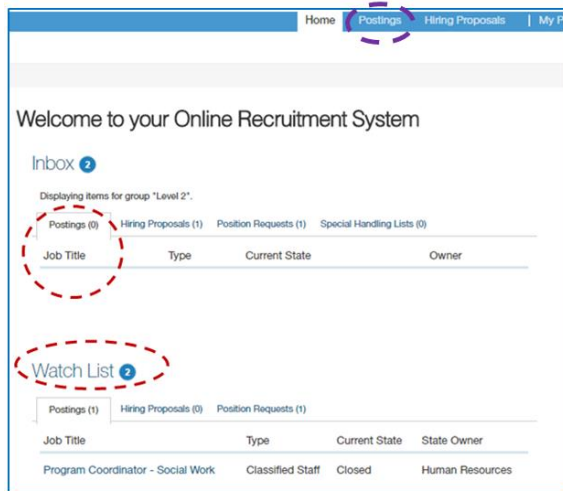


Postings and Applicant Pools

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

When it is time for VP 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.



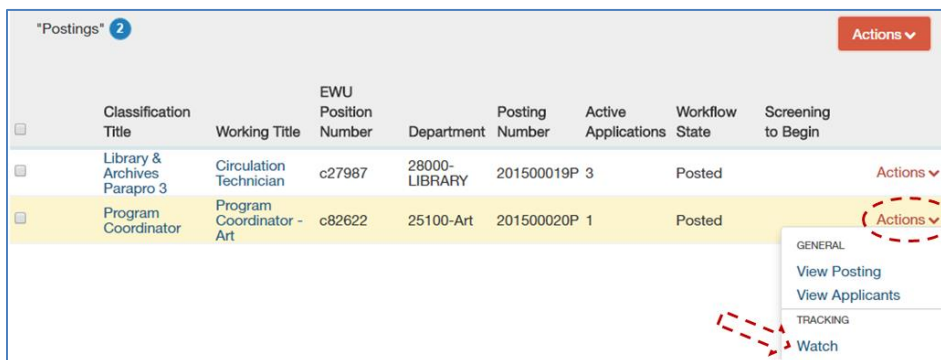
Since there are no system actions for a VP user to take on postings and applicant pools, your **Inbox** for Postings will always be empty.

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.

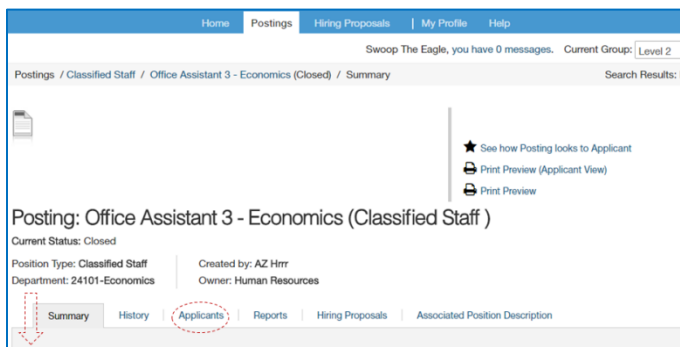
To search for the posting, hover over the Postings tab at the top, then select the type of position you're seeking (classified, exempt or faculty). Postings in your area will populate the screen as shown below.



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 wording, qualifications, screening questions (if any), and dates for screening and closing of the pool.

Reminder: you may not act on postings; therefore, there will be no links for editing or taking action.

	First Name	Last Name	Job Title	Job Announcement Number	Workflow State (Internal)	Last Updated	
<input type="checkbox"/>	Ad 1	Adam	Circulation Technician	201500019P	Selected for Campus Interview	February 12, 2016 at 08:14 AM	Actions
<input type="checkbox"/>	Ad	Benny	Circulation Technician	201500019P	Selected for Campus Interview	February 12, 2016 at 08:15 AM	Actions
<input type="checkbox"/>	Ad	Chrissy	Circulation Technician	201500019P	Backup candidate (Campus)	February 12, 2016 at 08:16 AM	Actions

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

Here are the things you can do when looking at a list of applicants as a VP 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, 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 VP 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.

	Actions
GENERAL	
Evaluate Applicants	
Download Applicants Evaluations	
Review Screening Question Answers	
Download Screening Question Answers	
Export results	
BULK	
Download Applications as PDF	
Create Document PDF per Applicant	

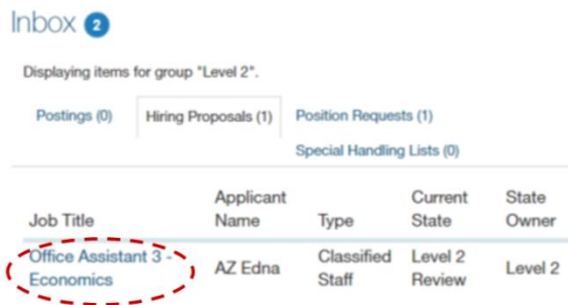
- Evaluate Applicants – this activity is handled by the Search Committee; the evaluation process is not available to VP users.
- Download Applicants Evaluations – VP users may use this option; it produces a spreadsheet showing how the various committee members evaluated the candidates at different stages in the search. The resulting spreadsheet is cumbersome.
- Review Screening Question Answers – Allows VP users to view how the individual applicants responded to screening questions created as part of the posting (if any).
- Download Screening Question Answers – Allows VP users to download applicants' screening question answers.
- Export Results – Allows VP users to export xxxxxxxxxxxxxxxxx
- Download Applications as PDF – Allows VP users to download xxxxxx
- Create Document PDF per Applicant – Similar to the above action, but creates individual PDF documents per Applicant.

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

Welcome to your Online Recruitment System



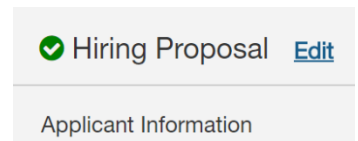
To review and approve a hiring proposal, login to your Home Page.

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.

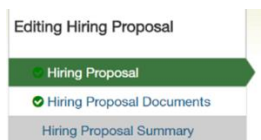
If a hiring proposal is in the system, but isn't in your queue, you can search for it, and then add it to your Watch List (in this example, there are no hiring proposals added to the Watch List).

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 [Edit](#) link (appears once you open the Hiring Proposal):



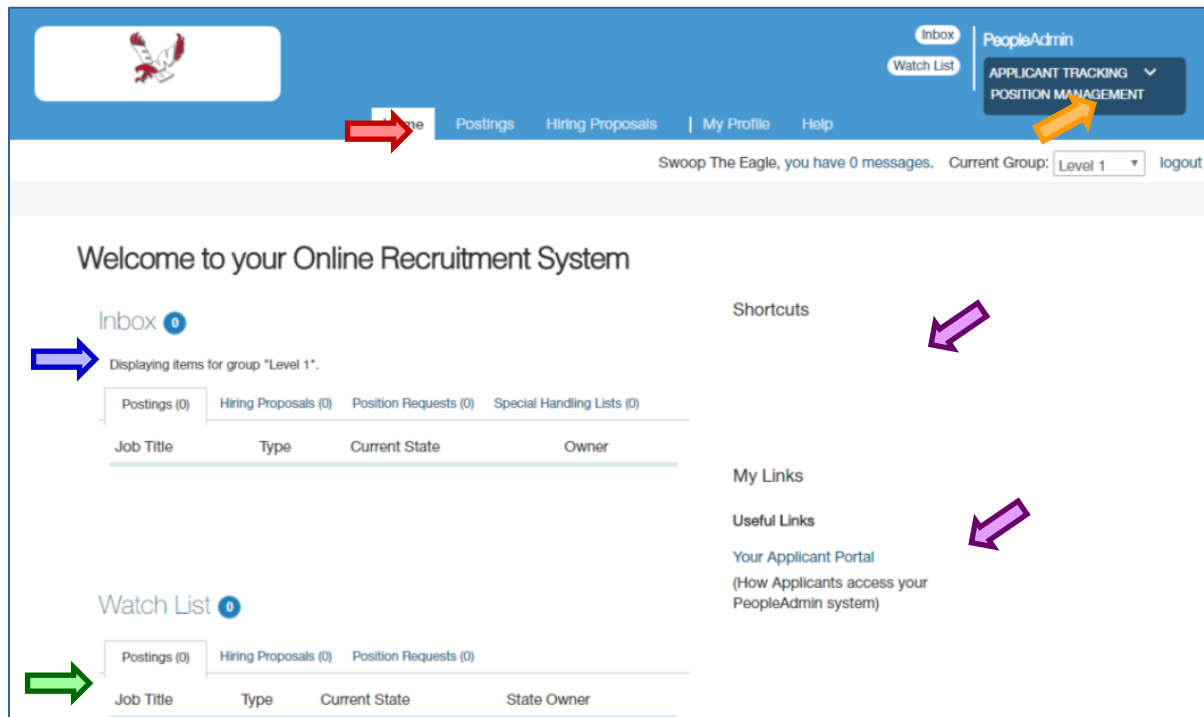
Save any changes you make (look for the [Save](#) button). While in Edit mode, you can scroll down and edit/add text in any open field. Additionally, you will see several options accessible through left-panel navigation:



- 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
 - 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.

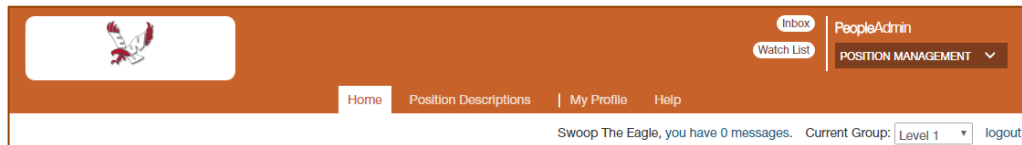
Most important, if you edit the Hiring Proposal and/or attach documents, make sure you save while on the page, before navigating to the Hiring Proposal Summary page!! On the Summary page, hover over the **Take Action on Hiring Proposal** button, and you'll see several options: (1) Keep working on this Hiring Proposal, or (2) Send to President Review (only required if the person being hired is a direct report to a VP), or (3) Send to Budget. Note – all hiring proposals will be routed to Budget for confirmation of the availability of funding!

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



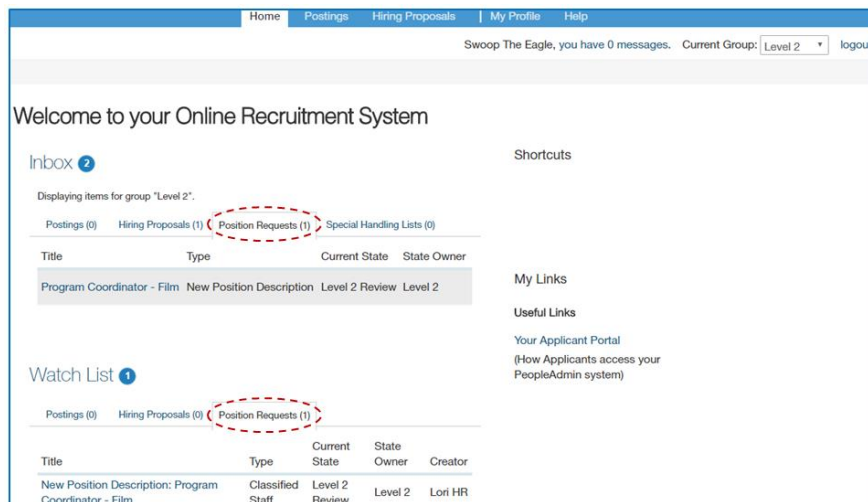
Every page in the system will present links for your Inbox and Watch List in the upper right corner

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 **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** ▾ 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:

Working Title	Posting Number	Department	Active Applications	Workflow State
Program Coordinator	201500015P	23012-Education	1	Closed
HR Consultant 1 - HRS	201500018P	44000-Human Resources, Rights & Risk	3	Posted
Circulation Technician	201500019P	28000-LIBRARY	3	Posted

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.

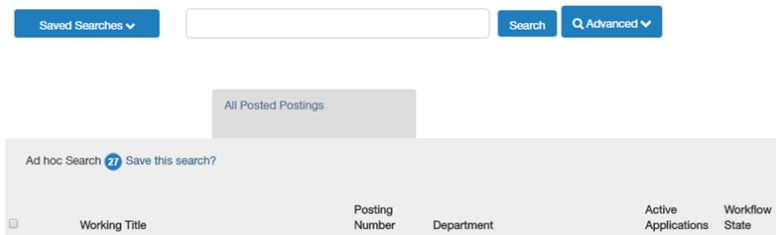
Modifying Existing Searches

Working Title	Posting Number	Department
Classified Staff PA Test - 05/06	2012001P	21000-ACAL

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:

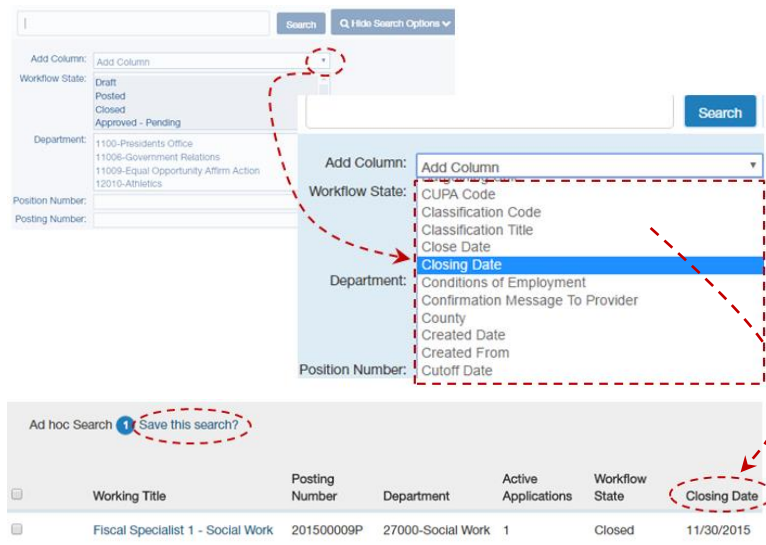
- Move the column left or right in the display,
- Sort column data in alpha-numeric or reverse order, or
- Delete the column.

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**, then scroll and select the search name to view that particular search.

Additional Helpful Search Tips

- Text search is not case sensitive.
- Enter whole words or fragments, except note that the fragment you enter to search on must either be part of the first word in the field being searched, or preceded by a space in the field. Example:

Working Title	You may search on any of the following:	These fragments will *not* work:
Office Assistant 3 - Economics	Office (whole word) Offi (part of the first word) Econ (part of a word preceded by a space)	fice ant 3 nomics

- Searches normally return items that contain all your search terms. For example, if you enter assistant 3 in the example above, the search returns items that contain both these words, including “Office Assistant 3 – Economics” and “Administrative Assistant 3 – Controller’s Office.”
- To exclude search results, use the minus (-) character. For example, to search for positions that include “Office Assistant” but not “Administrative Assistant,” enter *assistant –administrative*.
- You can’t do a search that only specifies what not to return, such as *-economics*.
- 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.

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
- ➔ Sandra Godin: Student Affairs, IT, and academic units not associated with a College, such as Grants; sgodin@ewu.edu; x4681

Position Descriptions

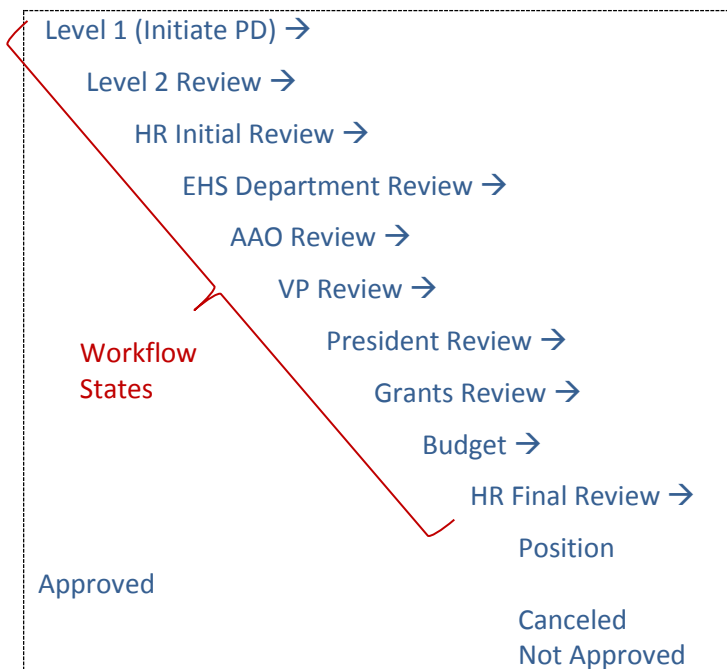
Introduction

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:

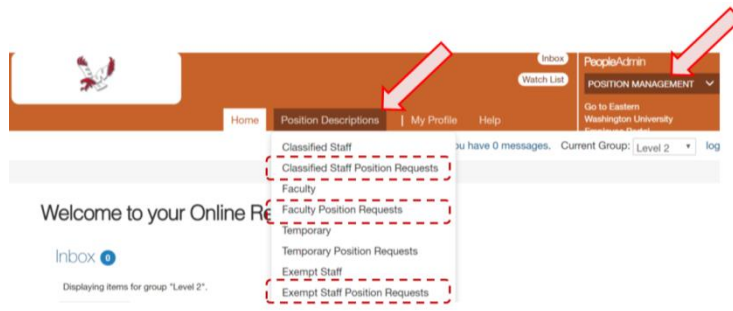
Level 1 is shown as the position which initiates position descriptions, simply because this is the type of system user who most commonly handles this activity.

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 position requests for each type of university employee. Select the position request 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.