# Human Resources Information Systems

## PageUp Originator User Guide

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## **Getting Started**

#### Accessing PageUp

1. Log in to PageUp using your Drexel domain user ID and password (same as for email)

#### System Navigation

The Home Screen / Welcome Screen contains three main sections:

- 1. My Dashboard
- 2. Main Menu (Hamburger Menu)
- 3. Quick Access Menu

■ PageUp.			edot <b>E</b>	People Recent items v Quick search Q	Robert 🗸 🥐 👻
2	My Dashboard Welcome Robert, this is your Dashboard where y	ou will see all your tasks organized in various st	ages.		
	Job description My position description - Under review Manage position descriptions and _	New job 22 Jobs open 27 Team jobs open	Approvals O Jobs awaiting your approval 2 Approved	Advertisements 6 Advertisements	
	Applications 3 Jobs have applicants for review	Search committee review 0 Jobs requiring panel review	Cifers Offers O Offers awaiting your approval 2 New hires O New hire tasks		

#### My Dashboard

Most of the navigation within the system will occur from My Dashboard. The dashboard shows pending actions and provides access to system processes on the tiles. Manage Position Descriptions, Jobs open, Approvals, Advertisements, Applications, and New Hires are also available via the Main Menu (hamburger menu). Select the hyperlink on the tile to open that page.

Job description My position description - Under review Manage position descriptions and	New job 22 Jobs open 27 Team jobs open	Approvals O Jobs awaiting your approval 2 Approved	Advertisements 6 Advertisements
Applications 3 Jobs have applicants for review	Search committee review O Jobs requiring panel review	Offers Offers O Offers awaiting your approval 2 New hires O New hire tasks	

- Job Descriptions: create, modify, and/or view position descriptions for the teams (departments) you have access to
- Jobs: View requisitions you have originated, or you have access to within a team
- **Approvals**: Job cards and position descriptions awaiting your approval or jobs you have approved
- Advertisements: Ads for jobs that are still open
- **Applications**: Applicants for open jobs that you are assigned to that are in a shortlisted status.
- Search Committee Review: Review applicants that have been allocated to a search committee you are a member of
- Offers: Offers for job cards that you manage and onboarding tasks for new hires that you manage

#### Main Menu

Select the **Main Menu** icon icon to expand the main menu. Many of the options available on My Dashboard are listed here. You can select the screen you would like to navigate to instead of returning to your dashboard when navigating between sections in the system.



Select the **Close** icon to collapse the main menu.

#### Quick Access Menu

The Quick Access Menu provides access to Jobs List, People Search, Recent Items, Quick Search, and Logout.



- Jobs: Selecting the Jobs quick link will bring you to open jobs that you have access to as an originator, additional reviewer, or supervisor
- **People**: Selecting the People quick link will redirect to the list of applicants for the open job you most recently accessed.
- **Recent Items**: Selecting the dropdown will display the most recently accessed items.
- Quick Search: Search for applicants and/or jobs you have access to
- Logout: Select the dropdown next to your user name to logout of the system.

## **Recruitment Process Overview**

#### Standard Hiring Process Steps

- 1. Establish a position description with a classification and salary grade (requires approvals)
- 2. Create a requisition from the position description (requires approvals)

- 3. Requisition is posted to careers.drexel.edu
- 4. Applicants apply to the open requisition
- 5. Requisition closes according to date specified when creating requisition
- 6. Applicants are screened and interviewed
- 7. Finalist is selected
- 8. Reference checks are completed
- 9. Offer card is created (requires approvals)
- 10. Online offer is made to applicant
- 11. Applicant accepts online offer
- 12. Applicant is requested to complete additional personal information
- 13. Background check, MVR (if applicable) are completed
- 14. Hire is completed

## **Position Descriptions**

All requisitions must be created from an existing, approved, position description. To access position descriptions, select "Manage Position Descriptions" from the Job Description tile on the Dashboard or from the Main Menu.

From the Position Description page users can:

- Create New Position Descriptions
- Edit Existing Position Descriptions
- View Existing Position Descriptions

#### **Position Descriptions Page**

The **Position Descriptions** page will display all job descriptions you have access to.

From the Position Description page users can:

- Create New Position Descriptions
- Edit Existing Position Descriptions
- View Existing Position Descriptions

New position description									
Job description									
Classification Title	Position Number	Employee	Name	Supervisor Name	Approval status	Status			A second second
					All	~ Active	*		Clear Search
Classification Title 🗢		osition Number	Employee Name	Supervisor Name	Date modified	Approval status			
Sworn Brother of the Night's W	Vatchi				22 Mar 2019	Approved		Edit View	Recruit for position Archiv
Sworn Brother of the Night's W	Vatch				22 Mar 2019	Draft		Edit View	Recruit for position Archiv

#### Create a New Position Description

1. Select "Manage Position Descriptions" from the Job Description tile or from the Main Menu

2. Select "New Position Description" at the top left of the Job Description page

New position description									
Job description									
Classification Title	Position Number	Employee	Name	Supervisor Name	Approval status	Status			
					All	- Active	9	Cle	ar Search
Classification Title 🛩	Ρα	sition Number	Employee Name	Supervisor Name	Date modified	Approval status			
Sworn Brother of the Night's Wat	ch				22 Mar 2019	Approved		Edit View Recruit for	position Archiv
Sworn Brother of the Night's Wat	ch				22 Mar 2019	Draft		Edit View Recruit fo	position Archiv

#### Complete the Position Description Information

Required fields are marked with an asterisk (\*) and must be completed in order to submit the position description for approval.

Selecting **Save** or **Save & Exit** at the bottom of the page will initiate the approval process. Please make sure you <u>add any notes or upload documents</u> prior to saving the entire position description.

#### **Position Information**

POS	ITION DESCRIPTION INFORMATI	ION
To edit an existing position description scroll appears select OK to reset the approval proc	to the bottom of the form and select UP ess.	DATE PD. In the pop-up window that
Items marked with an asterisk (*) are manda	itory	
	POSITION INFORMATION	
Type of action requested:	Select	v
Position Number:	Q Ø	,
	No position selected.	
Position Title:*		
	Enter the requested title above. Please note meet the HR standards and will be the offici below will be used for recruitment purposes	- the title may be updated by Compensation to al title in the HR system. The recruitment title
Recruitment Title:		
Position Type:*	Select ~	
Work Type:*	Select 🗸	
Hours Per Pay:*		
Supervisor:*	Q /	,
	No user selected.	
Employer (COA):*	Q /	,
	No Site name selected.	
Division:*	Select ~	
College:*	No College found	
Department:*	No Department found	

- 1. Select **Type of Action Requested**. Note: this field is for informational purposes only and does not define approval process or workflows. The definitions are listed below.
  - a. Adding Position Description to Recruit: Enter the position description for review to expedite the recruitment process.
  - b. **Update Position Description**: Modifying existing position description or entering existing position description into the system for the first time
  - c. **Create New Position (New FTE no existing position number):** Creating a new position. A budget transfer must be attached in the documents tab to create the new position.
  - d. Reclassification: Updating a position to be reclassified
- 2. **Position Number:** 
  - a. If existing:

i. Enter your Web\*Salary position number in the Position Number field

	1	Q 🖉	
D	No position selected		

ii. Press tab on your keyboard. The current position title will populate in the field, with the position number and additional information will display in the blue box.

Knight of the Kingsguard	Q 🥭
Position No: 1	~

- iii. Select 💙 to view additional information about the position.
- b. If New:

Position Number:

- i. Leave the position number field blank if this is a new position.
- ii. A budget transfer **must** be attached in the Documents tab to create the position number.
- 3. Enter the desired **Position Title**. Note: this title may be changed by Compensation to meet system requirements and align with Compensation standards for position titles. This will be the official title in the HR system.
- Enter the Recruitment Title for the position. This is optional. If the Position Title needs to be changed to meet character constraints or Compensation standards, the Recruitment Title field will be updated by Compensation.
- 5. Select the **Position Type**
- 6. Select the Work Type
- 7. Enter Hours Per Pay
- 8. Select  $\mathbf{Q}$  to search for the **Supervisor** for the position
  - a. Enter Employee First and Last Name
  - b. Select
  - c. Select the record for the supervisor
    - The users' name, poisition title, department will display under the User Information section. Please review this information to ensure you have selected the correct person

First name:	Robert		Last name:	Baratheon
E-mail:			Search	
First name 🔻	Last name	E-ma	il	_
Robert	Baratheon			
Page 1 of 1 User information:				
Name: Robert Barath Title: King of the Seve Department: Westero Email Address:	eon n Kingdoms Is			

- d. Select to populate the field
- 9. Enter the **Employer** or select  $\mathbf{Q}$  to review the available records
  - a. Drexel University: all positions under the Drexel University chart of accounts (COA: D)
  - b. Drexel University Online: all positions under the DUO chart of accounts (COA: O)
  - c. Academy of Natural Sciences of Drexel University: all positions under the ANS chart of accounts (COA: S)
- 10. Select the Division from the dropdown list
- 11. Select the College from the dropdown list
- 12. Select the **Department** from the dropdown list

#### Job Overview

	JOB OVERVIEW
In a few sentences briefly describe the primary function and purpose of position:*	
Below list up to ten (10) major tasks starting with th essential or non-essential and include an estimated answer the following questions. If you answer 'Yes'	he most important for which the position is responsible. Identify if the responsibilities/duties a d percentage of effort for the item. To determine if Duties / Responsibilities are ESSENTIAL plea ' to any of these questions the duty is deemed as ESSENTIAL.
<ul> <li>Does this position exist to perform this functi</li> <li>Can the function be performed by other emp</li> <li>Would taking this function from the job fund.</li> <li>Would there be significant consequences if th</li> <li>Did the previous incumbent of the position p</li> <li>Is special expertise or judgement required?</li> </ul>	ion? loyees in the department? amentally change the job? his function is not performed? erform this function?
JOB DUTIES	
% of time Duties / Responsibilities	Essential / Marginal
	There are no items to show
New	
Is this a Supervisory position?:*	○ Yes ○ No
If Yes - Please list the number of faculty and/or professional staff this position supervises:	

#### 1. Enter the Position Summary

# 2. Select void Job Duties (repeat for each additional job duty) JOB DUTIES % of time Duties / Responsibilities % of tim Duties / Responsibilities % of tim Lites / Responsibilities Add

a. Enter % of Time estimated for the job duty

- b. Enter the description of the job duty in the Duties/Responsibilities field
- c. Select Essential or Non-Essential from the dropdown
- d. Select dt add the job duty
- 3. Select if this is a Supervisory Position
- 4. If the position supervises others, **Enter the Number of faculty and/or professional staff** that report to this position.

#### Qualifications

QUALIFICATIONS		
Required Education:*	Select	Ŧ
	Only complete the field below if a specific major (e.g. Business Business with a concentration in Human Resources) is required	) and/or concentration (e.g. d.
Required Major / Concentration:		
Required Years of Experience:*		
Other Requirements (eg: Licenses / Certifications / Systems Knowledge):		
Preferred Qualifications:		

- 1. Select the minimum **Required Education**
- 2. Enter the Required Major/Concentration, if applicable
- 3. Enter Required Years of Experience
- 4. Enter **Other Requirements**, if applicable
- 5. Enter Preferred Qualifications, if applicable

#### Additional Information

ADDITIONAL INFORMATION		
	Physical demands of position (check all that are required on a regular/consistent basis.	apply) - Include only those physical demands that
Physical Demands:	Typically sitting at a desk/table     Typically standing, walking     Lifting demands ≤ 25lbs     Lifting demands > 50lbs	Typically bending, crouching, stooping     Typically running, climbing     Lifting demands ≤ 50lbs
Interaction with Minors required?:*	○ Yes ○ No	
If Yes Please Explain (enter N/A if No):*		
Does this Position Require a Motor Vehicle Check?:*	O Yes O No	

- 1. Select the **Physical Demands** that apply to the position
- 2. Select if Interaction with Minors is required

3. Enter an **Explanation** of the contact with minors, or enter "N/A" if not applicable

#### Position Classification

This section is displayed to the user but is only editable by Compensation. Once Compensation reviews the position and updates accordingly, the values will be displayed.

POSITION CLASSIFICATION - Compensation Us	e Only
Position Classification & Grade:	No position classification & grade selected.
FLSA Classification:	
ESOC Code:	
EEO:	

- 1. **Position Classification & Grade** will display the position classification (PCLS) selected by compensation, with the min, mid, max of the grade in the blue box
- 2. FLSA Classification will display Exempt or Non-Exempt as classified by Compensation
- 3. ESOC Code
- 4. **EEO**

#### Users and Approvals

		USERS and APPROVA	LS	
feam:		Westeros		•
Originator:*		Robert Baratheon	Q.8	
		Name: Robert Baratheon	*	
Approval process:*		Westeros 🗸		
1. Test 1:	Robert Baratheon	Q 8		
	<u>.</u>	~		
2. Test 2:		Q.C		
		Ÿ		
A Specialist:*			8	
			· · · · ·	

- 1. Select the **Team** (department) associated with the position. Users with access to the same team will have access to this position description
- 2. The **Originator** will default to the signed in user
- 3. Select the Approval Process related to your College/Administrative area
  - a. The Approval Process will default based on the Personnel Approval Authorization Policy
  - b. Complete the necessary approver information for any blank approval level. If no additional approval is needed, enter your own name to the field.

- 4. The Talent Acquisition representative will also default based on the Team selected
- 5. To submit the position description through the approval process, select **Save** or **Save and Close**.

#### Adding Notes & Uploading Related Documents Notes:

		Position inf	o No	tes	Docum	ients
		Add: Se	elect	~		
1. 2. 3. 4. 5.	Select the <b>No</b> Select <b>Note</b> f Enter the not Select <b>Save</b> to Once saved, t	<b>Ites</b> link a the top of rom the <b>Add</b> menu te in the popup to add the note the note will displa	of the page J by on the Not	tes page		
	Add: Select 22 May 2019, 10:46am This is a note about the	e position description			Robert	Baratheon
l Do	cument	Position info	Notes	<u>Docu</u>	<u>ments</u>	
		Select				

1. Select **Documents** link at the top of the page

Add Document

2. Select **Document from a file** from the select menu

#### 3. Upload a new document dialogue window

Upload a new document		₽
File:*	Upload file	
Document category:*	Budget Transfer Form	
Title:		
Save and add a	another Save and close Close	

- a. Select **Upload File** to upload a file
- b. Select the Document Category
- c. Enter Title for the document
- d. To save, select **Save and Close** to save the document and return to the documents tab. If you need to upload additional documents, select **Save and Add Another.** If you wish to close the dialogue **without saving** select **Close.**
- 4. Once saved, the document will display on the Documents page

#### Saving/Submitting the Position Description



- To save the position description without submitting through the approval process, select Save a Draft. The position description will be saved to your position description page with a status of Draft and you can edit at a later date.
- To save the position description and submit through the approval process, select Save to return to the position description you were working on or select Save & Exit to submit through the approval process and return to the list of Positions Descriptions you have access to
- 3. Select **Cancel** to close the position description without saving. You will lose all work.

#### Edit an Existing Position Description

- 1. Select **Edit** next to the position description you wish to modify from the Position Description page
- 2. Scroll to the bottom of the page and select "Update PD"
- 3. You will be prompted to confirm the action. Once the position description is in an update status, it can no longer be utilized for recruitment until the PD is approved again.
- 4. Edit the necessary fields, as definied in the <u>Complete the Position Description Information</u> section above
- 5. Select the Approval Process related to your college/administrative area

#### View Existing Position Descriptions

1. Select View next to the position description you wish to view

2. Additional options are available by selecting it the top right of the page

•••
Print
History
Revision history
Copy position description

Select **Print** to print the position description

- 4. Select **History** to review the dates revisions were made
- 5. Select Revision History to review the actual fields that were changed and compare versions
- 6. Select **Copy Position Description** to copy the information to a new position description

#### Position Descriptions FAQs

#### How can I view the status of a submitted position description?

The status is displayed in the **Status** column on the Position Description Page

#### The "Recruit for Position" options is not available, why?

The **Recruit for Position** option is only available once a position description is in an **approved** status.

How do I view where the Position Description is pending approvals?

- 1. Select View to open the position description
- 2. Scroll to the Approvals section
- 3. **1 You are here** will display next to the pending approver

#### Does the "resend email to approver" work?

Yes, however, please be mindful that the system will send automated reminders to approvers who have not acted. Reminder emails are sent to approvers outside of HR after 3 days of inaction. Reminders are sent to HR level approvals after 2 days of inaction.

## **Recruit for a Position**

All job requisitions must be generated from an approved position description.

#### Creating a Requisition

1. Select **Recruit for Position** link from the Position Description Page to open a **Job Card** from the approved position description

Job description								
Classification Title	Position Number	Employee	lame	Supervisor Name	Approval status	Status Active	~	Clear Search
Classification Title 🗢	Posi	tion Number	Employee Name	Supervisor Name	Date modified	Approval status		
Sworn Brother of the Night's We	atch				22 Mar 2019	Approved		Edit Vev Recruit for position rehive
Sworn Brother of the Night's We	atch				22 Mar 2019	Draft		Edit View Recruit for position Archive

#### Complete the Job Card

Selecting Recruit for position creates a new Job Card. The Job Card has 4 tabs:

- 1. Position Info
- 2. Notes
- 3. Sourcing
- 4. Documents

(492461) N	lew job	)			
Position info	Notes	Sourcing	Documents		

#### Position Information Tab

#### **Requisition Information**

		REQUISITION INFORMATIC	DN			
Requis	sition Number:	Leave blank to automatically create	a reference No.			
Officia	I HR Title:*	Knight of the Kingsguard				
Recruit	tment Title:	Knight of the Kingsguard				
Positio	ons:*					
P	osition no	Type:*	Ap	plicant	Application status	
1	Knight of the Kingsguard Q 🍠	Select	~ -		-	Cance
	Position No: 1	¥				
		Above, select the amount of positio	ns required: New (	additiona	al headcount) or Rep	add mor
Recruit Is this	tment Process:* position either partially or fully funded from	Above, select the amount of positio (backfilling an existing employee) Select	ns required: New (	additiona	al headcount) or Rep	lacement
Recruit Is this extern Employ	tment Process:* position either partially or fully funded from al sources?:* yer (COA):*	Above, select the amount of positio (backfilling an existing employee) Select O Yes O No Drevel University	ns required: New (	additiona	al headcount) or Rep	Add mor
Recruit Is this extern Employ	tment Process:* position either partially or fully funded from al sources?:* yer (COA):*	Above, select the amount of positio (backfilling an existing employee) Select Yes O No Drexel University Name: Drexel University	ns required: New (	additiona	al headcount) or Rep	Add mor
Recruit Is this   extern Employ Divisio	tment Process:* position either partially or fully funded from al sources?:* yer (COA):*	Above, select the amount of positio (backfilling an existing employee) Select Ves O No Drexel University Name: Drexel University	ns required: New (	additiona	al headcount) or Rep	Add mor
Recruit Is this extern Employ Divisio College	tment Process:* position either partially or fully funded from al sources?:* yer (COA):* n:* e:*	Above, select the amount of positio (backfilling an existing employee) Select O Yes O No Drexel University Name: Drexel University	ns required: New (	additiona	al headcount) or Rep	Add mon

- 1. Requisition Number will automatically generate after the Job Card is submitted
- 2. Official HR Title is displayed for reference purposes and is the official title of record
- 3. Enter desired **Recruitment Title** (if blank, the Official HR Title will be used in all advertisements)
- 4. Select **Type** of position that you are recruiting for
  - a. **New:** New position, no previous incumbent
  - b. **Replacement:** Replacement position, had previous incumbent or current incumbent is terminating
- 5. If you are recruiting for multiple vacancies of the same position (e.g. four Knights of the Kingsguard), you can utilize the same requisition to recruit for multiple vacancies. \*\*Discuss this option with Talent Acquisition prior to entering.\*\*
  - a. Enter the Web\*Salary Position Number

- b. All positions must have an approved **position description** with the same classification and title
- 6. Select Recruitment Process
  - a. Faculty
  - b. Professional Staff
- 7. Select External Funding response
- 8. Select Visa Sponsorship response
- 9. Employer (COA) is for reference only
- 10. **Division** display only
- 11. College/Administrative Area display only
- 12. Update Department if needed

#### **Position Details**

Most of the information under **Position Details** is displayed for reference only and cannot be modified. The information is displayed to assist with the creating of the **Job Advertisement**.

The only field that can be updated in this section is **Hours Per Pay**.

	POSITION DETAILS		
Position Type:	Professional Staff		
Work Type:	Full-Time		
Hours Per Pay:*	80		
Position Classification & Grade:	×		
FLSA Classification:	Non-Exempt		
EEO:	Other Professionals		
ESOC Code:	Protective Service Occupations		
Job Overview:	The Knight of the Kingsguard is responsible for	or the protection of the royal family.	
JOB DUTIES			
% of time Duties / Responsibilities		Essential / Marginal	
100% Protect the royal family		Essential	
Required Education:	HS Diploma or GED		
Required Major / Discipline:			
Required Experience:	1		
Other Requirements (eg: Licenses, Certifications, Systems Knowledge, etc.):			
Preferred Qualifications:			
Physical demands:	<ul> <li>✓ Typically sitting at a desk/table</li> <li>✓ Typically standing, walking</li> <li>✓ Lifting demands ≤ 25lbs</li> <li>✓ Lifting demands &gt; 50lbs</li> </ul>	<ul> <li>✓ Typically bending, crouching, stooping</li> <li>✓ Typically running, climbing</li> <li>✓ Lifting demands ≤ 50lbs</li> </ul>	
Interaction with Minors required?:*			
If yes, please explain (enter N/A if no)::*	Royal children		
Valid Driver's License Required?:*	○ Yes ④ No		

#### Posting / Advertising Details

The **Posting/Adverting Details** relates to the information that will be displayed in the advertisements, including the Application Form.

Job Location (e.g. University City):*	Select ~	
Requisition Open Date::*	22 May 2019	
Enter fund and org for advertising (note - grant funds cannot be used for advertising):*		
If you plan to advertise externally indicate the advertising sources:	□ HigherEd Jobs (30 day posting, \$150.00) □ Chronicle of Higher Ed (60 day posting, \$300.00)	Careerbuilder (30 day posting, \$300.00)
List additional external advertising sites (note all jobs are posted on diversity websites through Local Jobs Network):		
Advertising summary:		
Advertisement text:		
B I 및 S ■ · ∷ · ⊡ · ■ Formats ·	<u>A - A -</u> & <u>M</u> R <u>H</u> - <u>I</u> + •	(?
Form:	Select	Preview Customize for job
Form:	Select Select "Customize for Job" to add disqualifyii documentation. If you do not take any action Acquisition as disqualifying questions in the	Preview Customize for job ng questions and/or request additional n, the position requirements will be listed by Tale application.

- 1. Select the Job Location for the position (where the individual will be located)
- 2. The **Requisition Open Date** will default to today's date. If you wish for this to be posted in the future, please update to the date you would like it to open.
- 3. Enter **Fund and Org** for advertising. Grant funds cannot be used.
  - a. All jobs will be posted on the Drexel Careers site as well as Local Jobs Network at no cost
- 4. Indicate External Advertising sources
- 5. Enter any Additional External Advertising sites you would like to utilize
  - a. Please include a URL
- 6. Enter the Advertising Summary
  - a. The **Advertising Summary** should be one line, stating the position title, the work type, and department.

E.g.: Human Resources is actively recruiting for a full-time Human Resources Assistant.

- b. If left blank, Talent Acquisition will add the appropriate information
- 7. Enter the Advertising Text
  - a. The **Advertising Text** must contain the following:
    - i. About (information about Drexel, your College or Department)
    - ii. Job Summary
    - iii. Essential Functions
    - iv. Required Qualifications
    - v. Preferred Qualifications (if applicable)
    - vi. Physical Demands
    - vii. Location
    - viii. Additional Information / Instructions to the Applicant
  - b. If the Advertising Text is not completed, it will be added by Talent Acquisition
- 8. Select the appropriate application type from the Forms menu

- a. **Faculty Application** for all faculty positions. Base application requires applicant information (name, address, biographical information, etc.), CV, education, and references
- b. **Professional Staff**: Base application for all professional staff positions requires applicant information (name, address, biographical information, etc.), CV/resume, education, work history, and references
- 9. Select **Customize for Job** to add additional questions to the application. If the application is not customized by the originator, Talent Acquisition will add the base qualifications as additional questions.
  - a. Select the type of question from the **Item Library** 
    - i. Select List: creates a question with a dropdown list of answers
    - ii. **Text Field:** creates a question with a freeform text field for the applicant to answer
    - iii. **Text Area:** creates a question with a large freeform text area for the applicant to answer
    - iv. **Text Field Grouping:** creates a question with multiple text fields for the applicant to answer
    - v. Label: this is a text field to display on the question page. Do not use.
    - vi. Check Boxes: creates a question with check boxes for the applicant to select
    - vii. Date: creates a question where the applicant must select a date
    - viii. **File Upload:** creates the ability to attached additional documents (e.g. work sample, research statement, etc.)
    - ix. Radio Buttons: creates a question with radio buttons for the applicant to selectx. Question Library: list of standard questions to select from
  - b. Enter the question and responses (if applicable)
  - c. Save

#### Users and Approvers

- 1. If utilizing a Search Committee, enter the Search Committee Chair and Search Committee Members in the appropriate sections
- 2. Add Additional Applicant Viewers by selecting Add Additional Viewers
  - a. Select the checkbox if you would like the additional viewer to have the access to update the Applicant's status
- 3. Add Additional Reviewer if another employee will be assisting in the review of applications
- 4. Update **Supervisor** if needed (Note: the supervisor will have access to the job and the ability to review applications.)
- 5. Select Approval Process related to your college/administrative area
  - a. Complete the necessary approver information for any blank approval level. If you do not need to route the approval to another user, add your name to the field.

Add Notes & Upload Documents Add Notes

Position info	Notes	Documents
Add: Selec	t 🗠	

- 1. Select the **Notes** link a the top of the page
- 2. Select Note from the Add menu
- 3. Enter the note in the popup
- 4. Select **Save** to add the note
- 5. Once saved, the note will display on the Notes page

Add: Select Y	
22 May 2019, 10:46am	Robert Barati
This is a note about the position description	

#### Add Document

#### Add Documents

Please note, a business case form must be attached to all Professional Staff Positions.



- 1. Select **Documents** link at the top of the page
- 2. Select **Document from a file** from the select menu

3. Upload a new document dialogue window

Upload a new document					₽
File:*	🔓 Uploa	d file	S Dropb	хc	
Document category:*	Budget	Transfer	Form	,	
Title:	Dudget	Transfer			
Save and add a	another	Save a	nd close	Close	

- a. Select **Upload File** to upload a file
- b. Select the Document Category
- c. Enter Title for the document
- d. To save, select **Save and Close** to save the document and return to the documents tab. If you need to upload additional documents, select **Save and Add Another.** If you wish to close the dialogue **without saving** select **Close.**
- 4. Once saved, the document will display on the **Documents** page

#### Sourcing

Sourcing will be edited by Talent Acquisition.

#### Save & Submit the Job Card

Save a draft Save Save & exit Cancel
--------------------------------------

- 1. To Save the Job Card without submitting through the approval process, select **Save a Draft**. The position description will be saved to your Jobs page with a status of **Draft** and you can edit at a later date.
- 2. To Save the Job and Submit through the approval process, select **Save** to return to the Job Card you were working on or select **Save & Exit** to submit through the approval process and return to the list of Jobs you have access to
- 3. Select **Cancel** to close the Job Card without saving. You will lose all work.

#### Reviewing the Status of a Requisition

The status of a requisition can be viewed in multiple ways.

#### Jobs List

The Jobs List provides a list of all jobs you have access to within your teams or jobs for which you were added as an Additional Reviewer. The **Jobs List** provides a snapshot of the job and quick links to directly review applicants. Most originators will find this view the most useful.

1. Select Jobs from the Quick Access Menu

2. All jobs you have access to will be displayed based on the filters at the top of the page

Reg No.	Date created Title	Department	Status	Applicat	tion: COA	Open Date Close Date Originator Posted	
492452	22 May 2019 6 Knight of the Kingsguard	Wasteros	Approved	2	Drevel University	22 May 2019 - 31 May 2019. Robert Baratheon 🖋	II 🖬 🖬 🕹
492453	22 May 2019 O Knight of the Kingsguard	Westeros	Fending approval	0	Drexel University	Robert Baratheon 🗶	1 = C. &

- 3. If a job is posted, a green checkmark will appear in the **Posted** column
- 4. If a job has a status of **Pending Approval**, select the title of the job to open the Job Card to view the approvers and the approval status.

#### Jobs Tile

The **Jobs Tile** provides a quick overview of the number of open jobs you have originated and the number of open jobs within the teams you have access to.

1. Select **Jobs Open** to view the jobs you have originated or **Team jobs open** to view all jobs within the teams you have access to.

Visibility			Status							
All jobs	My jobs	Team jobs	All	Cu	rrent	Non-cu	ament			
2 search results										© Settings
Job number	Classification title	Recruitment Title	Department	Date added	4Ŧ	Status	Originator	Reporting to Manager	Team	
492462	Knight of the Kingsguard	Knight of the Kingsguard	Kingslanding	22 May 2019		Approved	Robert Baratheon	Barristan Selmy	Kingslanding	View
492463	Knight of the Kingsguard	Knight of the Kingsguard	Kingslanding	22 May 2019		Pending approval	Robert Baratheon		Kingslanding	View .

- 2. Select the different filters under **Visibility** and **Status** to change the views.
  - a. Visibility
    - i. All Jobs: all job requisitions you have access to, regardless of team or originator
    - ii. **My Jobs:** Job requisitions where you are the originator or supervisor
    - iii. **Team Jobs:** Job requisitions within teams you have access to
  - b. Status
    - i. All: Job requisitions in either a current recruitment or non-recruitment status
    - ii. Current: Job requisitions in a current recruitment status (all but filled or canceled)
    - iii. Non-Current: Job requisitions in a status of filled or canceled
- 3. To view additional information, such as applicants, posting status, select the **View** link to open the job.

#### **Reviewing Applicants**

#### Accessing Applicants

Originators can access applicants in multiple ways.

#### Jobs List

The **Jobs List** provides a list of all jobs you have access to within your teams or jobs for which you were added as an Additional Reviewer. The **Jobs List** provides a snapshot of the job and quick links to directly review applicants. Most originators will find this view the most useful.

- 1. Select Jobs from the Quick Access Menu
- 2. All jobs you have access to will be displayed based on the filters at the top of the page

Reg No.	Date created Title	Department	Status	Applica	niore COA	Open Date	Close Date	Originator	Posted	
492452	22 May 2019 @ Knight of the Kingsguard	Westeros	Approved	2	Drevel University	22 May 2019	31 May 201	Probert Baratheon	1 4	er 🛶 🗈 🕹
492453	22 May 2019 @ Knight of the Kingsguard	Westeros	Fending approval	02	Drivel University			Robert Baratheon	1 <b>X</b>	w 🛶 🖻 象

3. Select the number under the **Applications** column to display the list of applicants for the position

Knight of the	Kingsguard (492462)													
earch Results														
au Submitted	Status	Pret Name	First name	Last name	Phone	Mobile	Lmail	Dup	Employee	Source	Sub-source	n <sub>op</sub> •		
00023 May 2019	New	Aryo	@ Arya	Stark	1114114111		forensicfiles7:			Internet.	Website		909	view opplicatio
C10207123 May 2019	New	101	@jon	Snow .	11111111	111111	wetwork.not		•	Internet	Website	9	0.00	view applicatio

4. Select the applicants First Name or Last Name to open their Applicant Card.

#### Applications Tile

The **Applications Tile** provides a quick overview of the number of jobs with applications for review in a Short List status (New, Hiring Manager Review, Phone Screen, Interview).

- 1. Select Jobs have applicants for review
- 2. Select View Shortlisted Applicants

Requisition Number	Classification title	Date added 🔺	Status	Owner
492462	Knight of the Kingsguard	22 May 2019	Approved	

3. Select the Applicant Name or View to open the Applicant Card

#### Applicant Card

The Applicant Card displays the relevant details related to the applicant.

Address:		101 Castle Drive Winterfell, New Jersey 08038-0011, United States		Phone:	+1 111-111-1111	
E-mail:				Number:	1038	
Original s	source:	Invite to apply		Flags:		
View refer	rences					
Profile						
Applica	itions					
Applica	itions lght of the Kingsgu 2 dk Submitted: 23	<b>ard</b> May 2019 via Careers website		<b>New</b> Status changed 23 May 2019	No offer	(Actons  ▼ Flags Form Resur
Applica Magnetica #492462 History	itions ight of the Kingsgu 2 dk Submitted: 23	ard May 2019 via Careers website		New Status changed 23 May 2019	No offer	(Attions) = Plags Form Resur
Applica MP Knl #492462 History tem:	itions light of the Kingsgu 2 dk Submitted: 23 r All	ard May 2019 via Careers website		New Status changed 23 May 2019	No offer	(Adow ) Plags Form Resur
Applica W Knij #492462 History tem:	itions light of the Kingsgu 2 dk Submitted: 23 7 All ate & time	ard May 2019 via Careers website	×	New Status changed 23 May 2019	No offer	(Active ( Plags Form Resur
Applica History tem: Dav Tox	itions light of the Kingsgu 2 dk Submitted: 23 7 All ite & time day, 10:05am	ard May 2019 via Careers website Job: All Rem E-mail: Application received, To: Arya	v stark	New Status changed 23 May 2019	No offer	Actions (m Flags Form Resum

- 1. Select **Resume** to open the applicants CV/Resume
- 2. Select **Form** to open the application submitted for the position

#### Updating Applicant Status

Available applicant statuses are defined by the recruitment process selected. Many of the statuses send communications to the applicant. Please be mindful when moving applicants between statuses as they may be receiving emails associated with the change.

#### From the Applicant Card:

1. Select the Actions menu in the applications sections of the job card

App	lications					
1	Knight of the Kingsgu	Jard		New	No offer	Actors •
#49 Hist	2462 dk Submitted: 23	9 May 2019 via Careers website		Status changed 23 May 2019		Add document Add document from file Change status Change Ranking Communicate Complie and send
Item:	All	job: All	Ŷ			New form Offer details Send application
	Date & time Today, 10:05am	Item E-mail: Application received, To: A	rya Stark			Send application and change status View references Undisclose application

- 2. Select Change Status
- 3. Select the status to move the applicant to from the list. (Your list of options may vary from the list below)

hange application status		
New		
Initial Review Unsuccessful		
Hiring Manager review		
Hiring Manager review unsuccessf	ul	
Hiring Manager review successful		
Phone screen		
Phone screen unsuccessful		
Search committee review		
Interview		
Interviewed, Not Selected		
Reference Check		
Verbal offer		
Offer accepted		
Offer accepted, form completed		
Background/Peference check upsi	rcessful	
Background Check Completed	locessiui	
Offer declined		
oner deenned		
	Course Manuta Coursel	

- 4. Select Next
- 5. You will be prompted to confirm the move. If the status has an associated email communication to the applicant, the communication template will display. \*\*Do not modify the communication\*\*

		To	status	e Hiring	Manage	r revie	w				
mmunication te	mplate:	- No ter	mplate	-				2			
mail: Applicant:	• Yes	No No	(	3							
From:*			-	-		-	2	•			
Subject:* Ap	plication	update	13				10				
Message:										Me	ge fields
RIUS		10.00		Family -		-	-	12	-		6
Dear Arya, Sincere thank University. I'm pleased to recruitment p	s for you inform rocess a	you that	t in the your a ler revi	pplication i ew by the	A - of Knigh has pase hiring m	it of the sed the same set of the	d <sup>er</sup> he Kir he inst st.	illi - ngsqu ial sta	and a	wth <u>Dre</u> f the	xd
Dear Arya. Sincere thank University. I'm pleased to recruitment p Kind Regards, Human Resou Drexel Univer	s for you o inform rocess a rces <b>rsity</b>	ur interes you that nd is und	t in the your a ler revi	e position of pplication lew by the	<u>A</u> - of Knigh has pas hiring m	nt of ti sed th	d <sup>e</sup> he Kin he inst	mgsgu ial sta	and a	with Dre	xel
Dear Arya. Sincere thank University. I'm pleased to recruitment p Kind Regards, Human Resou Drexel Unive	s for you e inform rocess a rces rsity	you that	t in the your a ier revi	e position (	A -	nt of ti sed th	d <sup>e</sup> he Kir he inst	illi - ngsgu səl stə	L. ard •	with Dre	xel
Dear Arys, Sincere thank University. I'm pleased to recruitment p Kind Regards, Human Resou Drexed Univer	s for you inform rocess a rces rsity	ur interes you that nd is und	t in the your a ler revi	e position (	A -	it of ti sed th	d <sup>ar</sup> he Kir se init	illi -	ard =	with Dre	xel
Dear Arxa. Sincere thank University. I'm pleased to recruitment p Kind Regards, Human Resou Decxed Univer	s for you b inform rocess a rces rsity	you that	t in the your a ler revi	e position o pplication i ew by the	A -	通 - it of ti sed th sanage	d <sup>e</sup> he Kur re init	III -	ard +	with Dre	xel
Dear Args. Sincere thank University. I'm pleased to recruitment p Kind Regards. Human Resou Decised Univer	s for you inform rocess a rces rsity	ur interes you that nd is und	t in thi	e position (	<u>A</u> -	A -	d <sup>e</sup> he Kir he init	III -	L. ard •	with Dre	***

6. Select Move Now to confirm the move

#### **Bulk Actions**

You have the option to make an action for multiple applicants from the **Applicants List.** The most common use for this feature is to bulk compile multiple applicants to send to another individual.

1. Check the box next to the applicants you want to include (note, they must be the same color checkboxes)



2. Select the Bulk Action from the dropdown

### Offer and Onboarding

#### Offer Card

#### Create the Offer Card

1. From the Applicant Card, select the Actions Menu under the applications section

(I) Knight of the Kings	guard		New	No offer	Actions •
#492462 dk Submitted: 29 May 2019 via Careers website		Status changed 23 May 2019		Add document Add document from file Change status Change Ranking Communicate Communicate Compile and send	
item: All	y job: All	4			Offer details Send application
Date & time	Item				Send application and change status
🖾 Today, 10:05am	E-mail: Application received, To: A	rya Stari			Undisclose application

- 2. Select Change Status
- 3. Select Faculty Offer for faculty positions or Verbal Offer for professional staff positions.
- 4. Select **Move Now** to confirm the status change
- 5. You will be redirected to the Offer Card

#### Complete the Offer Card

The **Offer Card** will display applicant and job details. These sections can be minimized and are only included for reference. The **Offer Details** section must be completed.

Please fill in all m	andatory fields marked with an asterisl	k (*).	
Ms Arya St	ark (Arya)		
Personal deta	ails		
Job details			
= Offer details			
Approval status Recruiter: Date entered: Application	23 May 2019, 1:17 pm		
source:			
Position	ino	Type:	Applicant Application status
Knight	of the Kingsguard on No: 1	Replaceme	int
Start date:*	<b></b>		
End Date (if applicable):			
FLSA Classification:	Exempt		
Hours Per Pay:*	173.33		
Rate (Non-			
Exempt) or Salary(Exempt):	•		

- 1. Select the desired **Start Date**
- 2. Select the End Date, if applicable
- 3. Update the Hours Per Pay, if applicable
- 4. Enter the Hourly Rate for non-exempt positions or the Annual Salary for exempt positions
- 5. Confirm the Supervisor and update if needed
- 6. Enter the **Department Name for Offer**
- 7. Enter the Timesheet Org
- 8. Select the **Badge ID** from the dropdown
- 9. Enter the **Cost Center** for the background check
- 10. Select if the new hire Will be Working Remotely
- 11. Enter the Campus Mailing Address
- 12. Enter the Work Location Address if different from above
- 13. Enter any additional comments about the offer, including if new hire should charge a different labor distribution compare to the budget distribution

#### 14. Offer Documents:

a. For Faculty Offers, upload the signed contract under the Offer Documents section

Offer documents							
Ocuments attached to t	Occuments attached to the offer appear in the section below.						
Add document							
Document	Date	Size	Category				

- b. **Professional Staff** offer letters will be displayed in this section after the verbal offer is by Talent Acquisition and accepted by the candidate.
- 6. Select the Approval Process related to your College/Administrative Area from the list
- 7. Select **Save and Close** to submit the offer for approval

#### Offer Card Approved – TA Generates Online Offer

#### Professional Staff

Once the **Offer Card** has obtained all approvals, Talent Acquisition will reach out to the candidate to make the Verbal Offer. If the candidate accepts, Talent Acquisition will move the candidate to a status to generate the offer letter and online offer.

#### Faculty

Once the **Offer Card** has obtained all approvals, Talent Acquisition will move the candidate to a status that will generate the online offer. The online offer will include the contract uploaded in the documents section of the Offer Card.

#### Online Offer

When Talent Acquisition moves the candidate to a status of **Online Offer Made** the candidate will receive an email inviting them to view their offer via the **Applicant Portal**.

Welcome Arya				Home	Update profile	Update resumé	Account
You have been made an employment offer for your Knig	ht of the Kingsguard ap	plication.					
Just so we can get to know you better, we'd like for you t	o tell us more about yours	eif.					
So that we can understand where you'd really make a di	fference, every little bit of i	information you ad	counts! And of course -	you can always	s provide us your res	ume.	
Incomplete applications							
You have no incomplete applications.							
Cubmitted applications							
Submitted applications							
Knight of the Kingsguard (492462)					View application	Update references	Withde
Knight of the Kingsguard (492462)     Go7					View application	Update references	Withd
Current status: Offer Extended  DEREXEL UNIVERSITY  DEREXEL UNIVE					View application	Update references	Withd
biointieur appreadons biointieur appreadons biointieur (482462) GoT Appleaton submitted 23 May 2019 at 10 05am EST. Current status: Offer Extended biointieur status: Offer Ext					View application	Update references	Withd
bioinflated applications bioinflated applications bioinflated applications Got Application submitted 23 May 2019 at 10 05am EST. Current status: Offer Extended bicent status: Offer B					View application	Update references	Withd
Kinght of the Kingsguard (462452) GoT Appreation submitted 23 May 2019 at 10.05am EST. Current status: Offer Extended     DExect. UNIVERSITY Department off Human Resources Employment offer     You must read and agree to the terms of the offer before you	i can accept or decline the of	ffer.			View application	Update references	Withd
Knight of the kingsguard (462452) GoT Application submitted 23 May 2019 at 10:05am EST. Current status: Offer Extended     Department of Department of Human Resources     Employment offer     You must read and agree to the terms of the offer before you Congratulations, you have been made an employment offer for you	can accept or decline the of	fler.			View application	Update references	Withd
building of the Kingsguard (402462) GoT Appleation submitted 23 May 2019 at 10 05am EST. Current status: Offer Extended  DEXECT: UNIVERSITY Department of Human Resources  Employment offer You must read and agree to the terms of the offer before you Congratulations, you have been made an employment offer for Pease review the following documents before accepting or decid	i can accept or decline the of your Knight of the Kingsgu	fler.			View application	Update references	Withd
bioinflated applications bioinflated applications bioinflated applications bioinflated 23 May 2019 at 10.05am EST. Current status: Offer Extended bioinflated 23 May 2019 at 10.05am EST. Current status: Offer Extended bioinflated 23 May 2019 at 10.05am EST. Current status: Offer Extended bioinflated 23 May 2019 at 10.05am EST. Current status: Offer Extended bioinflated 23 May 2019 at 10.05am EST. Current status: Offer Extended bioinflated 23 May 2019 at 10.05am EST. Current status: Offer Extended bioinflated 23 May 2019 at 10.05am EST. Current status: Offer Extended bioinflated 23 May 2019 at 10.05am EST. Current status: Offer Extended bioinflated 23 May 2019 at 10.05am EST. Current status: Offer Extended bioinflated 23 May 2019 at 10.05am EST. Current status: Offer Extended bioinflated 23 May 2019 at 10.05am EST. Current status: Offer Extended bioinflated 23 May 2019 at 10.05am EST. Current status: Offer Extended bioinflated 23 May 2019 at 10.05am EST. Current status: Offer Extended bioinflated 23 May 2019 at 10.05am EST. Current status: Offer Extended bioinflated 23 May 2019 at 10.05am EST. Current status: Offer Extended bioinflated 23 May 2019 at 10.05am EST. Current Status: Offer Extended 24 May 2019 at 10.05am EST. Current Status: Offer Extended 24 May 2019 May 2019 May 2019 bioinflated 25 May 2019 M	i can accept or decline the of your Knight of the Kingsgu ining your offec. an within the "view application	tter. .aard apprication. n° link of the job.			View application	Update references	Withd
Kingin of the Kinginguard (462442) GoT Appleation submitted 23 May 2019 at 10.05am EST. Current status: Offer Extended      Department of Human Resources      Employment offer      You must read and agree to the terms of the offer before you      Congratulations, you have been made an enginyment offer for Pease rever the following documents before accepting or decil Once you have accepted your offer. It can be retrieved again for Dreave Exempt	can accept or decline the of your Knight of the Kingsgu ning your offer. an within the "view applicator	fler: aard application. n° linik of the jop.			View application	Update references	Withd
Knight of the kingsguard (462462) GoT Application submitted 23 May 2019 at 10 05am EST. Current status: Offer Extended      PREXEL UNIVERSITY Department of Human Resources      Employment offer      Vou must read and agree to the terms of the offer before you      Congatilations, you have been made an employment offer for Prease review the following documents before accepting or decil Once you have accepted your offer, it can be retrieved again for Dresse Exempt      By cicking "I accept", I confirm:	can accept or decline the of your Knight of the Kingsgu ming your offec. on within the "view application	tter. ward application.			View application	Update references	Withd
building of the kingsguard (482482) GoT Appleation submitted 23 May 2019 at 10 05am EST. Current status: Offer Extended  DREXEL: UNIVERSITY Department of Employment offer  Congratulations, you have been made an employment offer for Congratulations, you have been made an employment offer for Dease review the totolong documents before accepting or decid Once you have accepted your offer, it can be retrieved again for Drexet Example By cicking "I accept", it confirm:  I have read and agreed to the terms of the offer.	ican accept or decline the of your Knight of the Kingsgu ning your offer. an within the "view application	tter. ward application. " link of the job.			View application	Update references	Withd

#### New Hire Onboarding

After viewing and accepting the offer, new hires will be immediately redirected to complete new hire forms electronically through the applicant portal.



## Approvals

Approvers will receive emails notifying them that an item is pending their approval.

Job description My position description - Under review Manage position descriptions and	New job 2 Jobs open 2 Team Jobs open	Approvals 1 Jobs awaiting your approval O Approved	Advertisements 1 Advertisements
Applications 1 Jobs have applicants for review	Search committee review O Jobs requiring panel review	Offers Offers 1 Offers awaiting your approval O New hires O New hire tasks	

#### Approving Position Descriptions and Job Requisitions

- 1. Select **Jobs awaiting your approval** to review position descriptions or requisitions that are pending your approval.
- 2. Select View from the Manage Approvals Page

		• • •	•				
Manage approvals							
Approval status						These Sec	and a
Pending	>					Citon 360	aui
Date raised	job No.	Job ritle 🕳	Originator	New	Replacement		
22 May 2019	492463	Knight of the kingsguard	Robert Baratheon	1	0		view

- 3. After reviewing the information, select Approve or Decline
  - a. If you select Decline you will be prompted to enter a reason

#### Approving Offers

- 1. Select Offers awaiting your approval to review offers that are pending your approval
- Select View
   othe following offers have been assigned to you for approve. Click view to review the offer details, and then effer approve or decline the offer.
   Offer created \* Applicant name
   Zi Mary 2019 Any Stark
   Andrea Admin Alimmutars
- 3. Review the offer information
- 4. Select Approve or Decline
  - a. If you select **Decline** you will be prompted to enter a reason