The purpose of this guide is to provide instructions for Approvers of Positions, Postings, and Hiring Proposals for theAppState Careers system. The primary modules ASU will use are Position Management, Applicant Tracking and Performance Management.

This is a high level workflow of the PeopleAdmin Modules:

Go Applicant Tracking Position Management Performance Management Streamlined & Sustainable
# AppState Careers

## User Guide – Approvers

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1.0 INTRODUCTION

1.1 MODULE INTRODUCTION

The primary modules are: **Position Management**, **Applicant Tracking** and **Performance Management**. The system will provide workflows with email notifications and electronic approvals that will allow ASU to be far more efficient and sustainable.

The Search functionality in the modules allows users to create custom searches with desired columns and sorts. It also provides functionality to download the results to Excel.

*** NOTE: Faculty and Adjunct Position Management/Applicant Tracking will be implemented at a later date. ***

**Position Management**

This module allows ASU to maintain Positions for SHRA, EHRA Non Faculty and Temporary employees. The data will vary based on the Position Description.

Data will include: Banner ID, Position #, working title, supervisor, department, classification, EEO data, salary, fund codes, job competencies (core and functional), etc.

**Applicant Tracking**

This module will allow ASU to perform numerous tasks:

- Create Postings
- Post jobs to the Applicant portal including SHRA, EHRA Non Faculty, Faculty, Temporary
- Streamline workflows and electronic approvals for Applicant processing and the Hiring Process

Data will include fields copied from the Positions along with Search Committee specific Ranking Criteria and applicant documents.

**Performance Management**

This module allows ASU to manage the performance appraisal process. It provides for:

- Task Management
  - Includes Task reminders and completion tracking, form acknowledgments and approvals
- Visibility
  - Quick access to the information you need, whether you’re managing the program, evaluating your employees, or just keeping your personal work aligned with your performance goals.
  - Employee portal gives all employees easy, private, anytime access to their evaluation feedback and personal progress notes
  - Personalized dashboards for HR, supervisors, and employee
2.0 BASICS

2.1 WEBSITE: To access AppState Careers PeopleAdmin7, log into the ASU site at:

https://appstate.peopleadmin.com/hr/sessions/new

Note: It is recommended to use Google Chrome or Mozilla Firefox as your web browser.

2.2 LOGIN: Click the link to log in with your AppState ID using Shibboleth Single Sign-On

2.3 HOME PAGE

Header bar:

- **Watch List** – Displays the Postings, Hiring Proposals and Position statuses you have flagged to monitor. What you see will vary based on your Current Group.

In the example below you can take Action to View or Stop Watching a posting:
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User Guide – Approvers

- **Inbox** – Monitors required Actions. Type of Action awaiting depends on your Current Group and the Workflow state.
Module – PeopleAdmin product modules/interface. Select assigned modules from the dropdown list.

- Applicant Tracking displays a blue header bar
- Position Management displays an orange header bar
- Performance Management is opened by clicking the Go to Performance Management Portal link under the dropdown list

Action Tabs – Access Home page, Position Descriptions, Classifications, My Profile, Help. The options available will vary based on your Current Group. An Employee Current Group will not have all the options. These Tabs are explained in detail further in this document.

Messages – You can see your message count next to your name. Messages automatically expire after 1 day.

Current Group – What you can do is managed by grouping permissions into roles and assigning you the groups of permissions that you need. You may need to switch groups to complete some of your tasks. Everyone will be assigned the Employee Current Group. An Employee may also be a member of other groups. Change your Current Group as actions require.

After selecting a different Current Group, you will receive a message indicating that you are now viewing as a member of the group you selected. Click the message box to close it.
**My Profile** – Allows you to establish personal settings, including managing emails, setting your default Product Module and Current Group.

**Profile Actions**
- **Edit Profile**: You can set your Preferred Group (Current Group) and Module.
- **Request Group Change**: See section 2.4 for a detailed explanation
- **Manage Emails**

*Note:* Change Current Group to Employee to update your profile.

- **Edit Profile** – Under the Summary tab, you can set your Preferred Group on Log In and your Default Product Module.

- **Manage system emails**: Opt out of emails being sent based on certain events.
Each employee will be set up with a Current Group = Employee initially.

If you need to have access to another Current Group, you can request it as follows:

You will see Current Groups you have, and you can request access to new Current Groups:

*Note:* if you are eligible to have access to every department in your area, you can click the parent level.

After HR approves your request, the new Group name will appear in your Current Group list.
2.5 SEARCH

Searches are used throughout the modules and can be saved for personal use.

Once HR grants an employee a Current Group that allows searches by position, you can search by type: SHRA or EHRA Non Faculty using the Position Descriptions tab.

The difference between SHRA/EHRA and SHRA/EHRA Position Actions is that SHRA/EHRA Position Actions display positions with a Pending Action whereas SHRA/EHRA shows only those approved.

1. Select \textit{POSITION MANAGEMENT} from the drop down (upper right of screen). Change to the desired Current Group (Data Entry, Supervisor, etc.). You will receive a message indicating that you are now viewing as a member of the group you selected. Click the message box to close it.

2. Select the desired type from the list (SHRA, EHRA Non Faculty, etc.).

\textbf{Note}: SHRA Position Actions or EHRA Position Actions will display all positions with an action whereas SHRA or EHRA shows only those approved.

3. You can open a saved search by hovering over \textit{Saved Searches} and selecting from the drop down list. (Saved searches apply to the type of search you are performing and the Current Group you have selected.)

\textbf{- Or -} Create a new search:

a. Enter your desired keyword and click \textit{Search}. Your results will display at the bottom of the screen.

b. Click \textit{More Search Options} to add more columns and set defaults.

c. From the Add Column drop down list, you can select columns to add to the search results. Add as many as desired.

1. For example, you can select a desired Department to create a departmental search.
You can now move columns around into desired positions (or even delete if not needed):

1. To move a column, hover over the column at the bottom of the screen.
2. There are several choices:
   1) = move the column to the left/right
   2) = sort ascending/descending
   3) = delete the column

Notice this search folder is temporarily called . To save it, click .

Click if desired.

Provide a search name .

Click .

To export the query results to Excel, click and .

Note: Similar searches can be performed by choosing from the drop down list in the upper right corner. You can search SHRA, EHRA Non Faculty, and Temp Postings and Hiring Proposals by clicking the appropriate tab and choosing from the list of options.
2.6 WORKFLOW SUMMARIES

Approvals will be needed for:

1. Positions/Posting Workflow (or changes)
2. Applicant Workflow (qualified, interviewed, recommended for hire, etc)
3. Hiring Proposal Workflow

Note: Once an Applicant Workflow is owned by a Search Committee Chair, change Current Group = Search Committee Chair to review.

Here is a summary of each by type (SHRA, EHRA Non Faculty, Temporary):

Note: EHRA Faculty and Adjunct will be added later.
Workflow – EHRA Non Faculty

1. Position/Posting Workflow

New Positions will be created and Approved at each level and then the Position can be Posted by Search Committee Chair or Equity EEO

Data Entry → Search Committee Chair → Department Head → Dean/Director → Equity EEO → Vice Chancellor → HR Approves → Equity EEO Posts → Ready for Applicants

2. Applicant Workflow

Applicants apply to the Posting via the Web Portal. All applicants create an account and upload pertinent documents.

Applicants under Review by Search Committee Chair → Search Committee Chair determines qualified → Search Committee Chair Select for Phone Interview → EEO Approves Campus Interview → Search Committee Chair Campus Interviews → Search Committee Chair sends Prioriti to Hiring Manager → Hiring Manager begins hiring proposal

3. Hiring Proposal Workflow

After the Hiring Manager selects the most qualified Applicant, the Hiring Proposal can begin.

Hiring Manager → Department Head → Dean/Director → EEO Equity → Vice Chancellor → HR to Extend Offer → Applicant Hired → Posting Filled → EEO Equity Close Proposal
Workflow – Temporary

1. **Posting Workflow**

   Postings are submitted to and Approved by HR.

   - Data Entry
   - Supervisor
   - Hiring Manager
   - Department Head
   - Dean/Director
   - Vice Chancellor
   - Human Resources

2. **Applicant Workflow**

   Applicants apply to the Posting via the Web Portal. All applicants create an account and upload pertinent documents.

   - Applicants under Review by Search Committee Chair
   - Referred to Hiring Manager
   - Search Committee Chair selects for Interview
   - Search Committee Chair Recommends to be Hired
   - Hiring Manager begins the Hiring Proposal

3. **Hiring Proposal Workflow**

   After the Hiring Manager selects the most qualified Applicant, the Hiring Proposal can begin.

   - Hiring Manager
   - Department Head
   - Dean/Director
   - Vice Chancellor
   - Controller
   - Human Resources
   - Extend Offer
   - Hired
Workflow Actions will trigger an email to be sent to the next approver in the process. You will be notified when your Action is needed.

Log into the application at [https://appstate.peopleadmin.com/hr/login](https://appstate.peopleadmin.com/hr/login)

- **Postings**: a list of Actions awaiting approval for your Current Group:

Actions are available because the State Owner is Department Head, and I selected the Department Head Current Group. In the example on the next page I switch to the Hiring Proposals folder while still in the Department Head Current Group.
Note that in the Hiring Proposals Folder below, I have one Hiring Proposal Awaiting Approval. However, there are no Actions available until I change my Current Group to Hiring manager.
Go back to your Inbox and repeat the process until all Awaiting Actions have your approval in each of your Current Groups. All Actions work in a similar manner. You will need to select the Action you need to approve, and your available options will depend on the type of Action and your Current Group.
1. Select **APPLICANT TRACKING** or **POSITION MANAGEMENT** from the drop down (upper right corner).

2. Click **Inbox** (top right of the screen).

3. Click **Actions** tab.

4. If you have actions, on the row of the desired record, click **Actions** and then **View**.

5. After you validate the fields, click **Take Action** or **Take Action On Hiring Proposal** and select the appropriate workflow status.

**Note:** Actions will varying based on the Position/Posting status and the workflow status.

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### Quick Steps – Viewing Watch List

1. Select **APPLICANT TRACKING** or **POSITION MANAGEMENT** from the drop down (upper right corner).

2. Click **Watch List** (top right of the screen). A list of Postings, Hiring Proposals and Positions you have checked to watch will be displayed.

3. If you have actions, on the row of the desired record, click **Actions** (to the left).
   
   a. For Postings: select to **View Posting** or **Stop Watching Posting**.
   
   b. For Positions: select to **Show Position Status** or **Unwatch Position Status**.

4. If you select to Show or View, you can then validate the fields, click **Take Action** and select the desired workflow action.

**Note:** If your Position/Posting is no longer in your Watch list because of the workflow status, you can still search using the **Postings** or **Position Descriptions** from the menu bar.
Step 1. Select \textit{POSITION MANAGEMENT} or \textit{APPLICANT TRACKING} from the drop down (upper right of screen).

Step 2. Change to the desired Current Group (Data Entry, Supervisor, etc.). You will receive a message indicating that you are now viewing as a member of the group you selected. Click the message box to close it.

Step 3. Select the desired action (Position Descriptions if you chose Position Management or Postings/Hiring Proposals if you chose Applicant Tracking) and select the type from the list (SHRA, EHRA Non Faculty, etc.).

a. \textbf{Note}: SHRA Position Actions or EHRA Position Actions will display all positions with an action whereas SHRA or EHRA shows only those approved.

Step 4. Create a new search:

a. Enter your desired keyword and click \texttt{Search}. Your results will display at the bottom of the screen.

b. Click \texttt{More Search Options} to add more columns and set defaults.

c. From the Add Column drop down list, you can select columns to add to the search results. Add as many as desired.

d. If you are searching SHRA Position Descriptions or EHRA Non Faculty Position Descriptions, you can select a desired Department to create a departmental search.

e. You can now move columns around into desired positions (or even delete if not needed):

   1. To move a column, hover over the column at the bottom of the screen.

   2. There are several choices: \begin{itemize}
      \item [1)] \texttt{<>} = move the column to the left/right
      \item [2)] \texttt{<>} = sort ascending/descending
      \item [3)] \texttt{X} = delete the column
   \end{itemize}

f. Notice this search folder is temporarily called \texttt{Ad hoc Search}. To save it, click \texttt{Save this search?}.

g. Click \texttt{Make it the default search?} if desired.

h. Provide a search name.

i. Click \texttt{Save this Search}.

Step 5. You can open a Saved Search by hovering over \texttt{Saved Searches} and selecting from the drop down list. (Saved searches apply to the type of search you are performing and the Current Group you have selected.) You can then modify the saved search and save it with a new name if desired.

Step 6. To export the query results to Excel, click \texttt{Actions} and \texttt{Export results}.  
ASU has developed some user guides that are available on the HRS website/Managers & Supervisors tab/AppState Jobs link/AppState Jobs Resources or by following the link below.

http://hrs.appstate.edu/managers-supervisors/appstate-jobs/appstate-jobs-resources

- AppState Careers PA7 Quick Steps – Saving a Search
- AppState Careers PA7 Quick Steps – SHRA
- AppState Careers PA7 Quick Steps – EHRA Non Faculty
- AppState Careers PA7 Quick Steps – Temporary
- AppState Careers PA7 User Guide – Approvers
- AppState Careers PA7 User Guide – Search Committee Chair