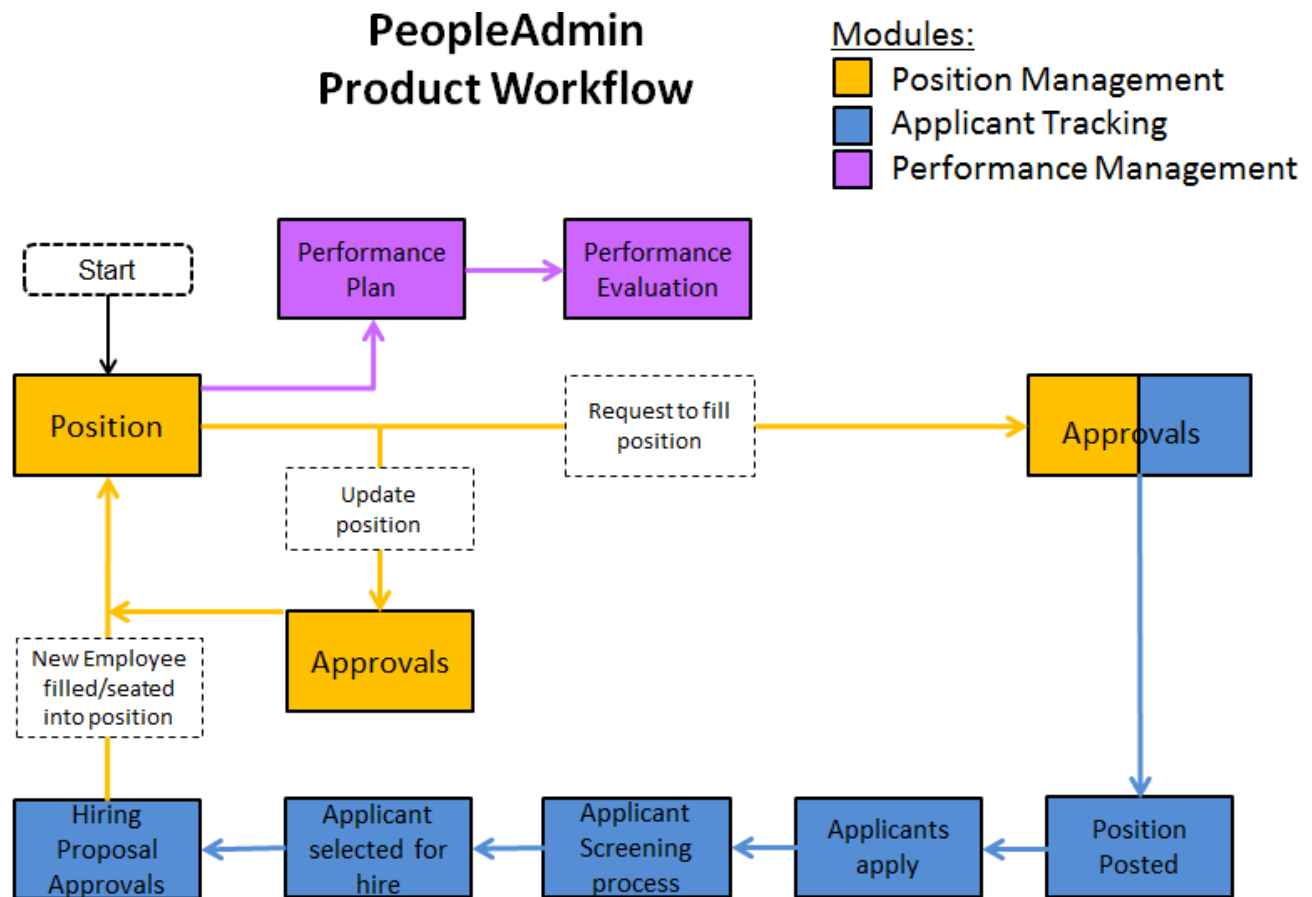


AppState Careers

User Guide – Approvers

The purpose of this guide is to provide instructions for Approvers of Positions, Postings, and Hiring Proposals for the AppState 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 **A**pplicant Tracking **P**osition Management **P**erformance Management **S**teamlined & Sustainable **!**



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AppState Careers

User Guide – Approvers

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

AppState Careers

User Guide – Approvers

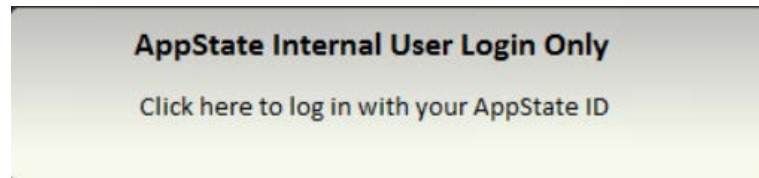
2.0 BASICS

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

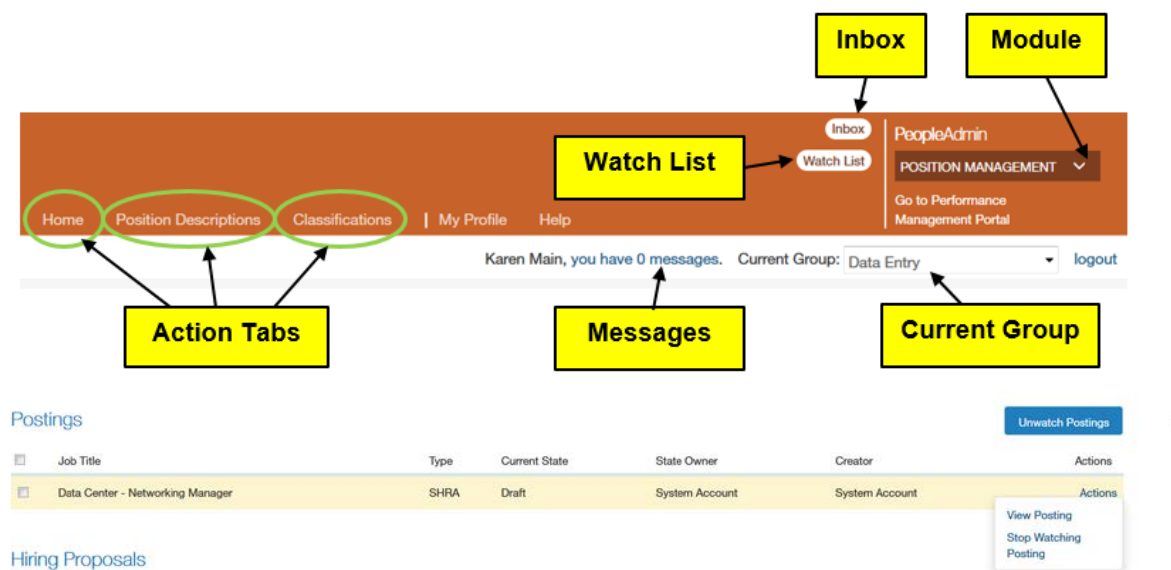


2.3 HOME PAGE

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:



AppState Careers

User Guide – Approvers

- **Inbox** – Monitors required Actions. Type of Action awaiting depends on your Current Group and the Workflow state.

Postings Inbox Report

Tab Options

This is the key option to check.

Postings Hiring Proposals Position Actions

Postings Reports

Awaiting Approval (6)

Total

User Groups who need to perform the action

Postings Awaiting Approval

You are viewing Approval inbox items.

Data Entry (0)
Dean/Director (0)
Department Head (0)
Employee (0)
Hiring Manager (0)
Human Resources (6)
Search Committee Chair (0)
Search Committee Member (0)
Supervisor (0)
Vice Chancellor (0)

Position Actions Inbox Report

Postings Hiring Proposals Position Actions Onboarding Tasks Special Handling Lists

Position Actions Reports

Awaiting Approval (13)

Department Head (1)

Position Actions Awaiting Approval

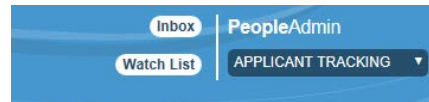
Title	Type	Current State	State Owner	Actions
Business & Technology Application Specialist	New Position Description	Under Review by Department Head	Department Head (Karen Main)	<div>View Edit TRACKING Stop Watching</div>

As a member of the Department Head Current Group, you can choose from these actions.

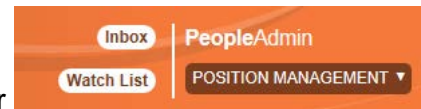
AppState Careers

User Guide – Approvers

- **Module** – PeopleAdmin product modules/interface. Select assigned modules from the dropdown list.

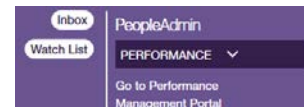


- Applicant Tracking displays a blue header bar



- 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.

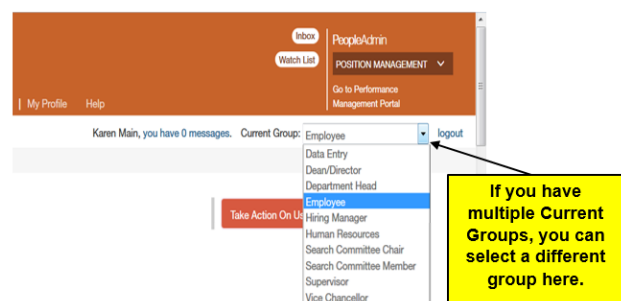


- **Messages** – You can see your message count next to your name. Messages automatically expire after 1 day.



- **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.

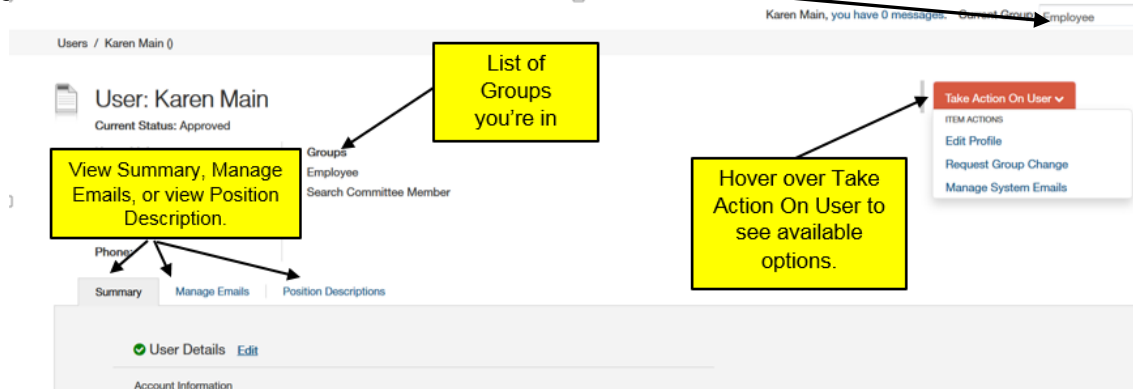


AppState Careers

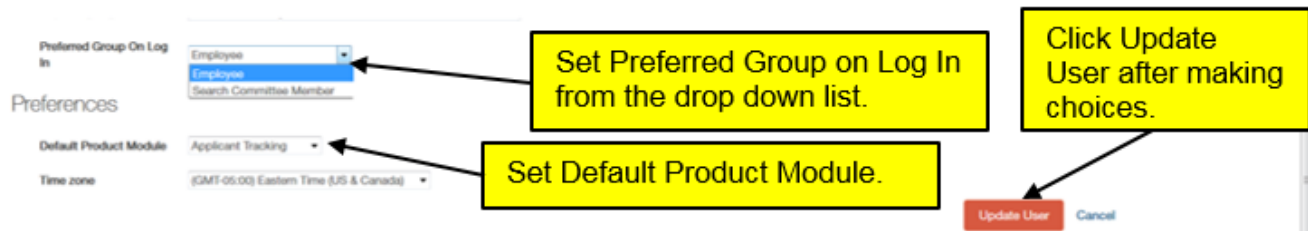
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- **My Profile** – Allows you to establish personal settings, including managing emails, setting your default Product Module and Current Group.
- **Profile Actions**
 - o Edit Profile: You can set your Preferred Group (Current Group) and Module.
 - o Request Group Change: See section 2.4 for a detailed explanation
 - o Manage Emails

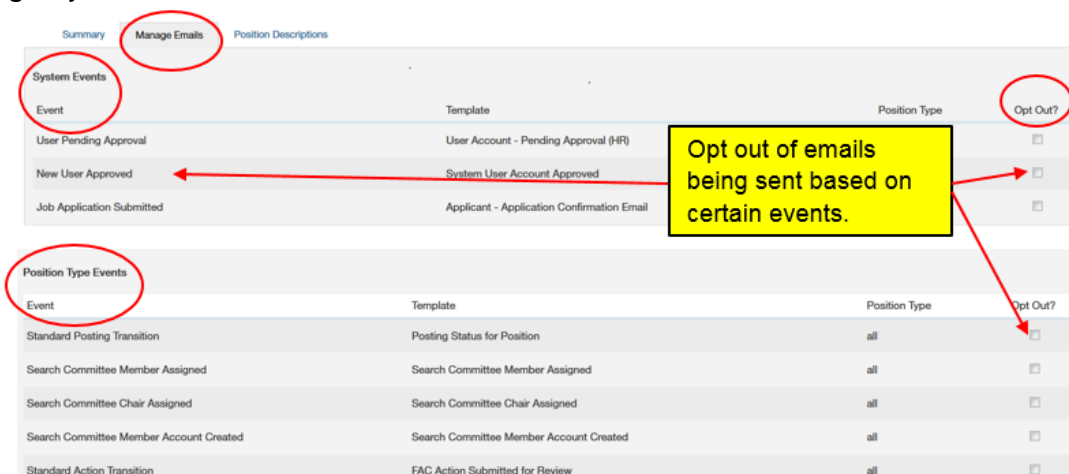
Note: Change Current Group to Employee to update your profile.



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



- o Manage system emails:



AppState Careers

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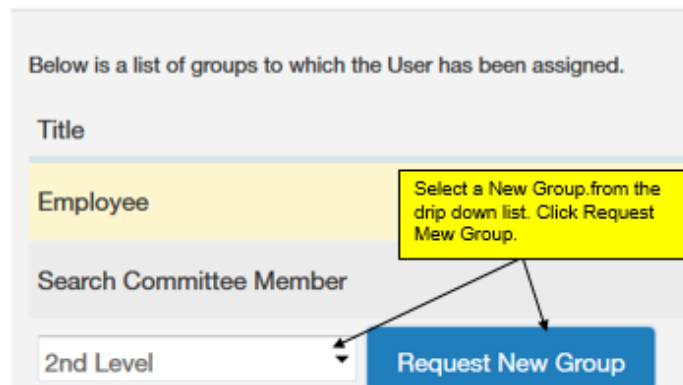
2.4 REQUEST ACCESS: New Current Group

Each employee will be set up with a Current Group = Employee initially.

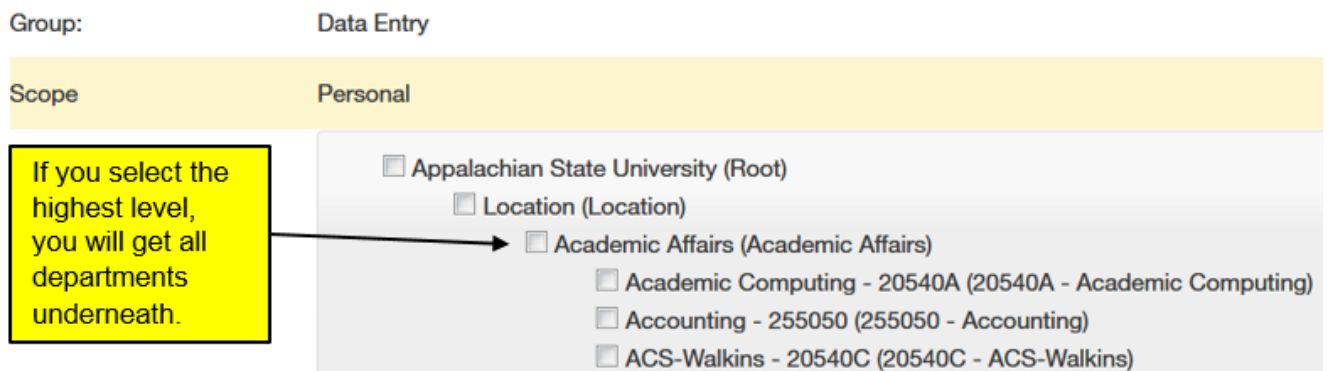
If you need to have access to another Current Group, you can request it as follows:



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.

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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 **POSITION MANAGEMENT** from the drop down (upper right of screen). Change to the desired Current Group (Data Entry, Supervisor, etc.). Current Group: Data Entry. 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.).



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 **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.)

- Or - Create a new search:


- a. Enter your desired keyword and click **Search**. Your results will display at the bottom of the screen.
- b. Click **More Search Options** to add more columns and set defaults.
- c. From the Add Column drop down list **Add Column** 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.


AppState Careers

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

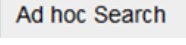
1. To move a column, hover over the column at the bottom of the screen.


2. There are several choices: 

1)  = move the column to the left/right

2)  = sort ascending/descending

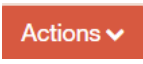

3)  = delete the column


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

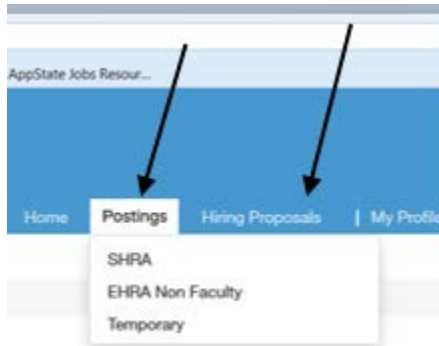
f. Click  **Make it the default search?** if desired.

g. Provide a search name

h. Click .

i. 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.



AppState Careers

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2.6 WORKFLOW SUMMARIES

Approvals will be needed for:

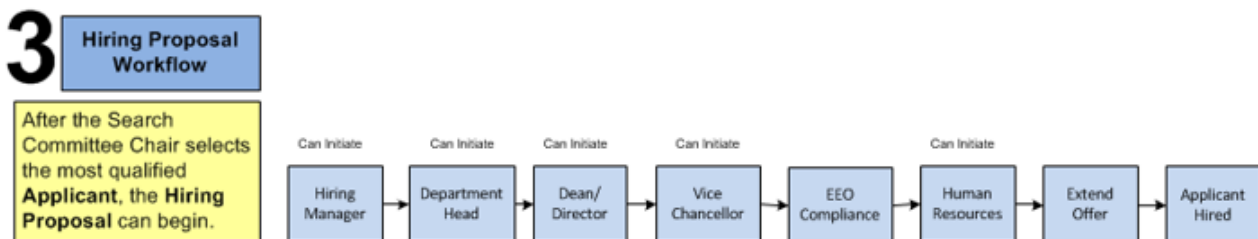
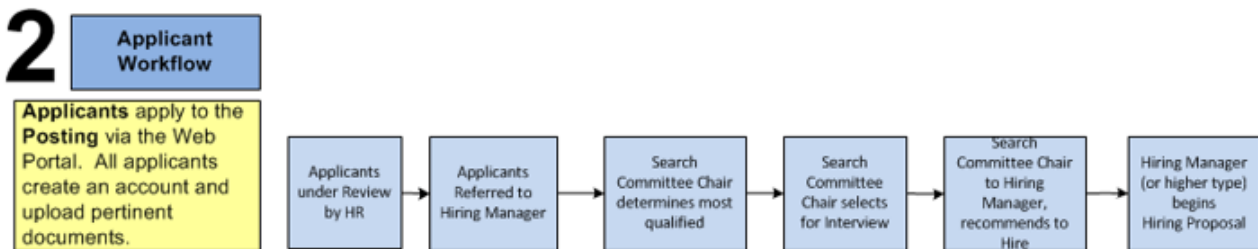
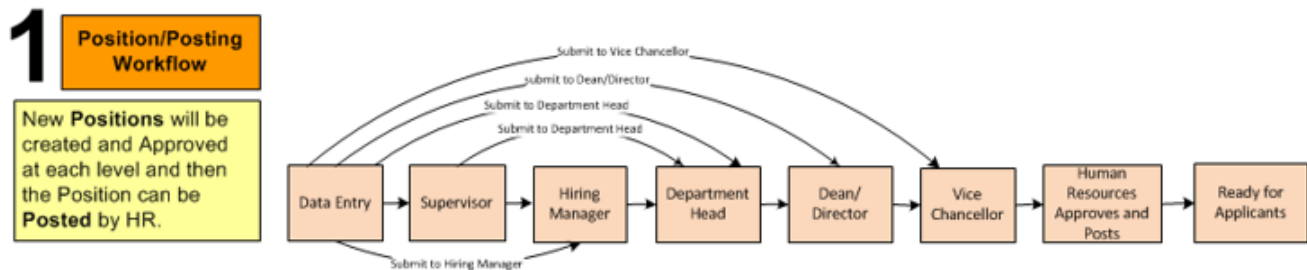
1. Positions/Posting Workflow (or changes)
2. Applicant Workflow (qualified, interviewed, recommended for hire, etc)
3. Hiring Proposal Workflow

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 - SHRA



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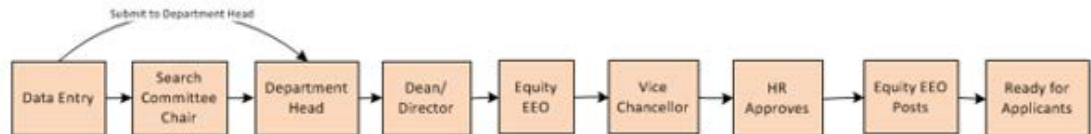
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Workflow – EHRA Non Faculty

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



2

Applicant Workflow

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



3

Hiring Proposal Workflow

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



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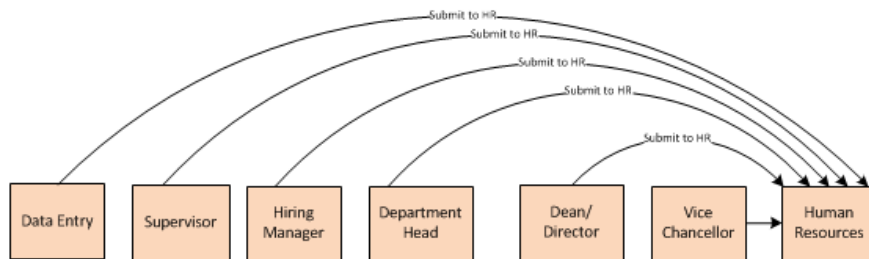


Workflow – Temporary

1

Posting Workflow

Postings are submitted to and Approved by HR.



2

Applicant Workflow

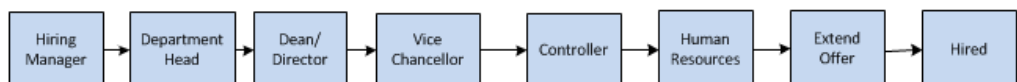
Applicants apply to the **Posting** via the Web Portal. All applicants create an account and upload pertinent documents.



3

Hiring Proposal Workflow

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



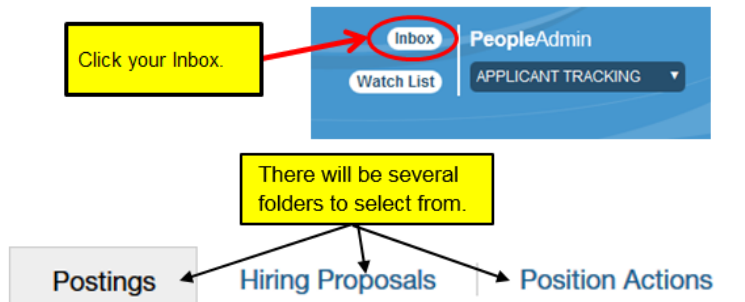
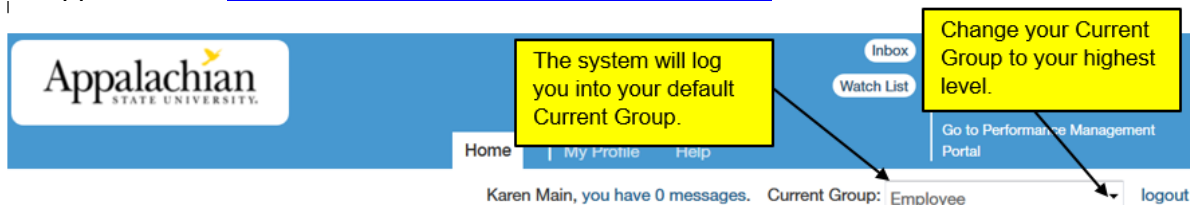
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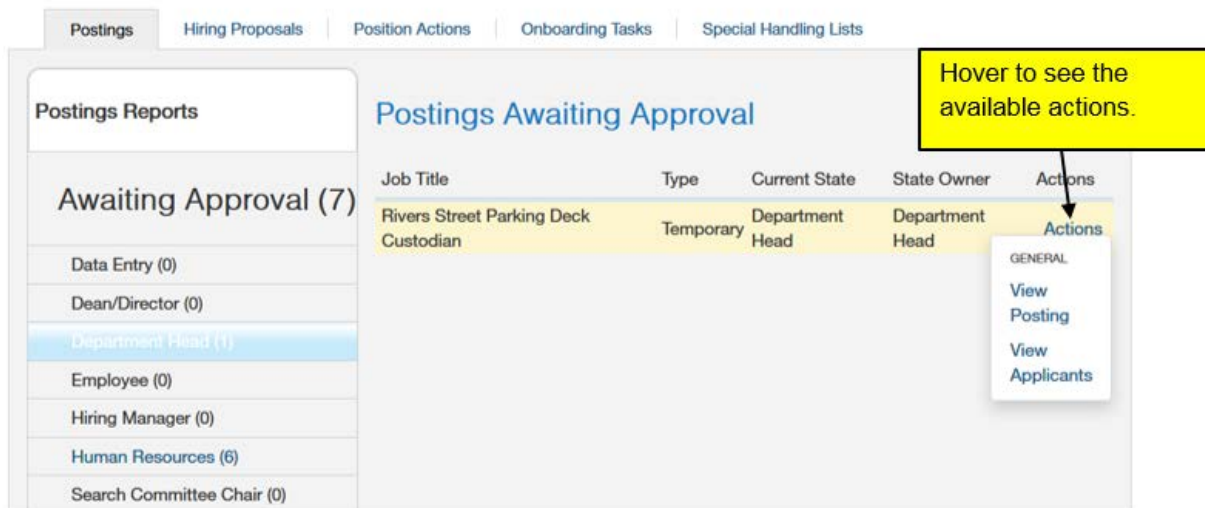
2.7 APPROVALS AND WORKFLOW ACTIONS

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>



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



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.

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User Guide – Approvers

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.

Hiring Proposals Inbox Report

The screenshot shows the 'Hiring Proposals' tab selected. On the left, under 'Hiring Proposals Reports', the 'Awaiting Approval (6)' category is highlighted. The main table, titled 'Hiring Proposals Awaiting Approval', has columns: Job Title, Applicant Name, Type, Current State, State Owner, and (Actions). The first row shows 'Housekeeper', 'Karen Main', 'SHRA', 'Hiring Manager', and 'Hiring Manager'. A yellow callout box in the top right corner states: 'Current Group = Department Head. No Actions Available'.

Job Title	Applicant Name	Type	Current State	State Owner	(Actions)
Housekeeper	Karen Main	SHRA	Hiring Manager	Hiring Manager	

Hiring Proposals Inbox Report

This screenshot is similar to the previous one, but the 'Current Group' is now 'Hiring Manager'. A yellow callout box in the top right corner states: 'Current Group = Hiring Manager. Actions Available'. The 'Actions' column for the 'Housekeeper' row now shows a dropdown menu with 'View' and 'Edit' options.

Job Title	Applicant Name	Type	Current State	State Owner	(Actions)
Housekeeper	Karen Main	SHRA	Hiring Manager	Hiring Manager	Actions View Edit

➤ Take Action

Hiring Proposals Inbox Report

This screenshot includes two yellow callout boxes with instructions. Box 1, located at the bottom center, says '1. Click to access the action awaiting approval.' with an arrow pointing to the 'Hiring Manager (1)' category in the left sidebar. Box 2, located at the top right, says '2. Hover over Actions and click Edit.' with an arrow pointing to the 'Edit' option in the 'Actions' dropdown menu for the 'Housekeeper' row.

Job Title	Applicant Name	Type	Current State	State Owner	(Actions)
Housekeeper	Karen Main	SHRA	Hiring Manager	Hiring Manager	Actions View Edit

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User Guide – Approvers

Editing Hiring Proposal

Hiring Proposal

Save Next >>

3. Review each section and make changes if needed.

4. Click Next to move from section to section.

5. When finished, select Summary.

Home Position Descriptions Classifications My Profile Help Go to Performance Portal

Karen Main, you have 0 messages. Current Group: Hiring Manager

SHRA / ... / Karen Main (Declined Job Offer) / Hiring Proposal / Summary

Hiring Proposal: Karen Main (SHRA) Edit

6. Click to Take Action. The choices will depend on the Workflow State and your Current Group.

Take Action On Hiring Proposal

Keep working on this Hiring Proposal

WORKFLOW ACTIONS

Submit to Department Head (move to Department Head)

Take Action

Submit to Department Head (move to Department Head)

Kevin Patterson

Comments (optional)

7. Enter Comments if needed.

8. Uncheck if you want the item removed from your watch list.

☒ This hiring proposal is currently in your watch list. Uncheck this box to remove it.

Submit Cancel

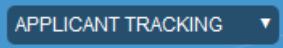


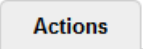
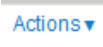



9. Click Submit.

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.

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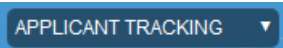
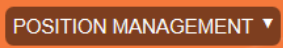

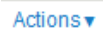





User Guide – Approvers

Quick Steps – Viewing Inbox

1. Select  or  from the drop down (upper right corner).
2. Click  (top right of the screen).
3. Click  tab.
4. If you have actions, on the row of the desired record, click  and then  .
5. After you validate the fields, click  or  and select the appropriate workflow status.

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

Quick Steps – Viewing Watch List

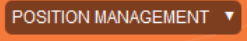
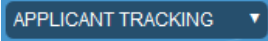










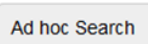

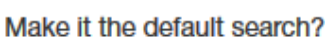



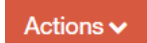

1. Select  or  from the drop down (upper right corner).
2. Click  (top right of the screen). A list of Postings, Hiring Proposals and Positions you have checked to watch will be displayed.
3. If you have actions, on the row of the desired record, click  (to the left) .
 - a. For Postings: select to  or  .
 - b. For Positions: select to  or  ,
4. If you select to Show or View, you can then validate the fields, click  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  or  from the menu bar.

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User Guide – Approvers

Saving a Search

- Step 1. Select  or  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. **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 . Your results will display at the bottom of the screen.
- b. Click  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:   
 - 1)  = move the column to the left/right
 - 2)  = sort ascending/descending
 - 3)  = delete the column
- f. Notice this search folder is temporarily called . To save it, click .
- g. Click ☐  if desired.
- h. Provide a search name .
- i. Click .
- Step 5. You can open a Saved Search by hovering over  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  and .

AppState Careers

User Guide – Approvers

AppState Careers User Guide List

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 User Guide – Introduction and Basic Navigation
- 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