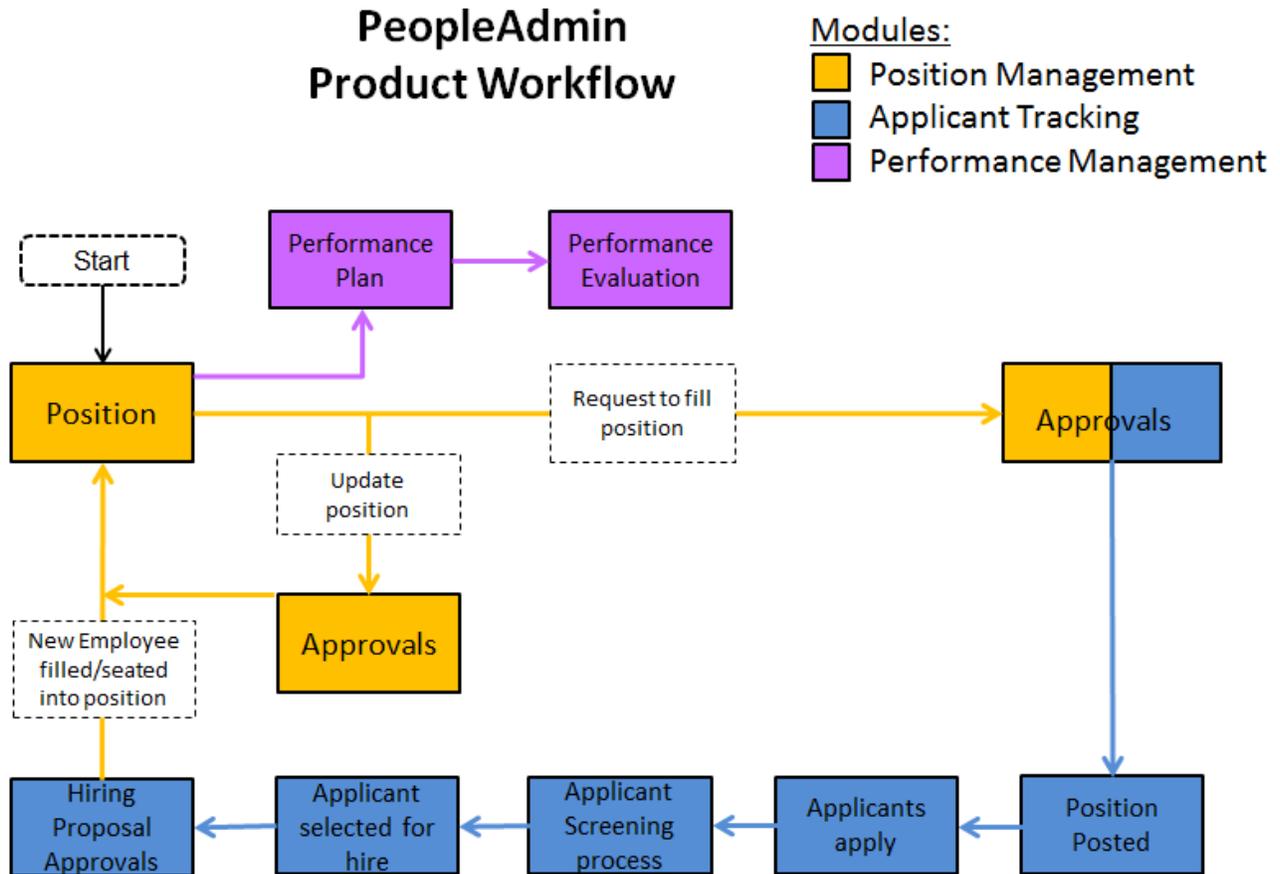# AppState Careers
User Guide – Introduction and Basic Navigation

The purpose of this guide is to provide an introduction to 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 Applicant Tracking Position Management Performance Management Streamlined & Sustainable !

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<u>User Guide – Introduction and Basic Navigation</u>

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
  o Includes Task reminders and completion tracking, form acknowledgments and approvals
➢ Visibility
  o 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.
  o Employee portal gives all employees easy, private, anytime access to their evaluation feedback and personal progress notes
  o Personalized dashboards for HR, supervisors, and employees

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2.0   BASICS

2.1   WEBSITE: To access AppState Jobs 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

> **AppState Internal User Login Only**
>
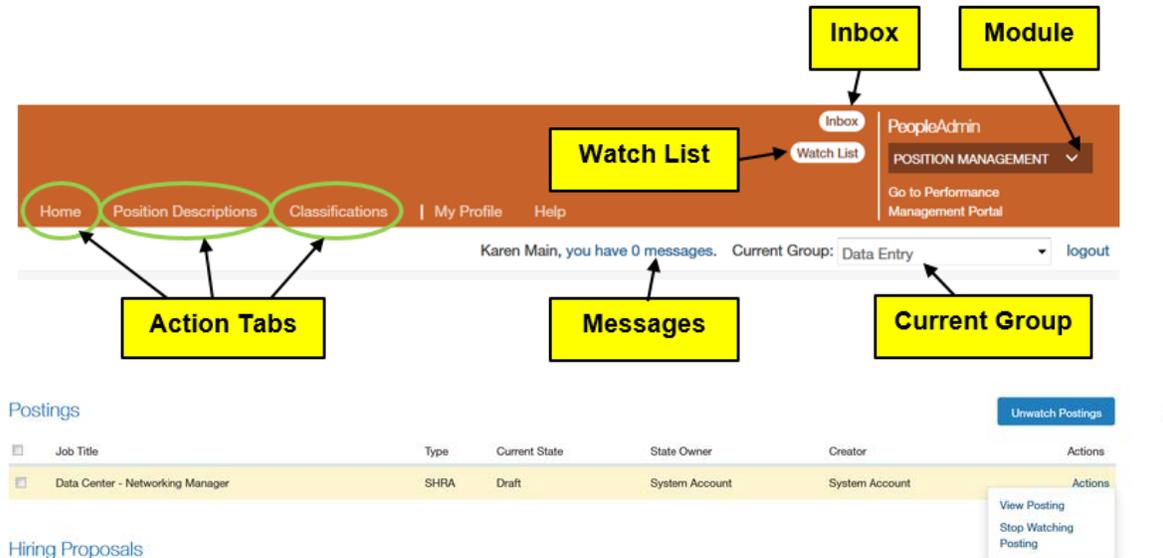> Click here to log in with your AppState ID
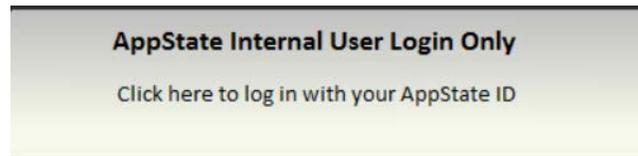
2.3   HOME PAGE

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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➢ **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

Postings Awaiting Approval

Awaiting Approval (6)

Total

- 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)

User Groups who need to perform the action

Position Actions Inbox Report

Postings | Hiring Proposals | **Position Actions** | Onboarding Tasks | Special Handling Lists

Position Actions Reports

Position Actions Awaiting Approval

Awaiting Approval (13)

Title	Type	Current State	State Owner	Actions
Business & Technology Application Specialist	New Position Description	Under Review by Department Head	Department Head (Karen Main)	Actions

- Data Entry (0)
- Dean/Director (0)
- Department Head (1)
- Employee (0)
- Hiring Manager (0)
- Human Resources (11)
- Search Committee Chair (0)

View
Edit
TRACKING
Stop
Watching

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

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► **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.
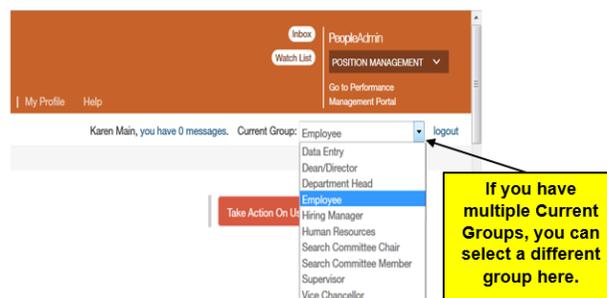
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➢ **My Profile** – Allows you to establish personal settings, including managing emails, setting your default Product Module and Current Group.

➢ **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 you *Preferred Group on Log* In and your *Default Product Module*.

   o Manage system emails:

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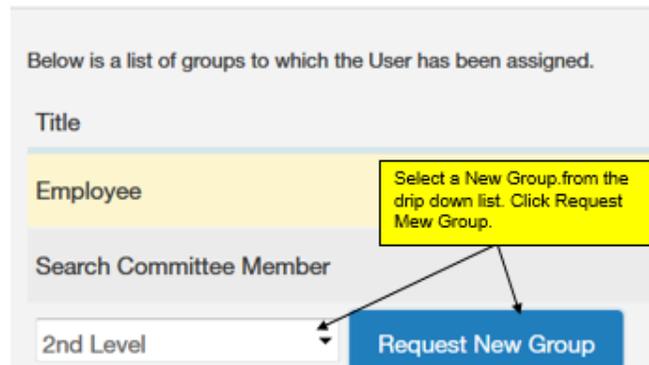
Note: if you are eligible to have access to every deparrtment in your area, you can click the parent level.

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.

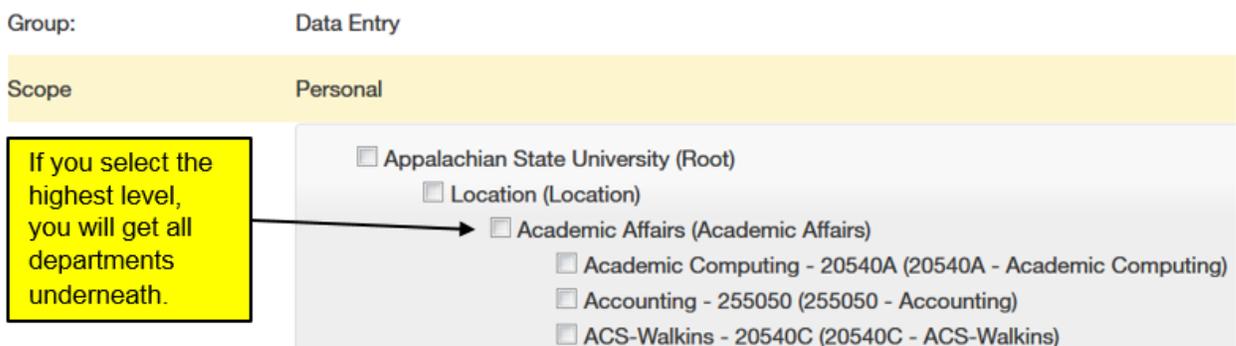1. Select **POSITION MANAGEMENT ▼** from the drop down (upper right of screen). Change to the desired Current Group (Data Entry, Supervisor, etc.). **Current Group: Data Entry**. You will receive a message indicating that you are now viewing as a member of the group you selected. Click the message box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

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 **Ad hoc Search**. To save it, click **Save this search?** .

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

g. Provide a search name **Name** [   ] .

h. Click **Save this Search** .

i. To export the query results to Excel, click **Actions ∨** and **Export results** .

Note: Similar searches can be performed by choosing **APPLICANT TRACKING ▼** 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.
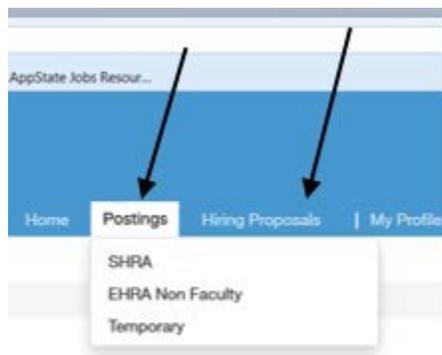
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Quick Steps – Viewing Inbox

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.

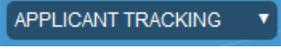4. If you have actions, on the row of the desired record, click Actions▼ and then View .

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.

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.*

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Quick Steps – Saving a Search

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

2. 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.

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.*

4. Create a new search:

    a. Enter your desired keyword and click **Search**. Your results will display at the bottom of the screen.

    b. Click **Q 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.

    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: **‹ › ^ ⌄ ✖**
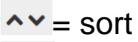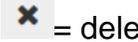
            1) **‹ ›** = move the column to the left/right

            2) **^ ⌄** = sort ascending/descending

            3) **✖** = delete the column

    f. Notice this search folder is temporarily called **Ad hoc Search**. To save it, click **Save this search?**.
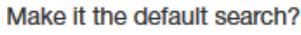
    g. Click **☐ Make it the default search?** if desired.

    h. Provide a search name **Name [_____]**.

    i. Click **Save this Search**.

5. 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.) The saved search can be modified and saved with a new name if desired.

6. To export the query results to Excel, click **Actions ✔** and **Export results**.
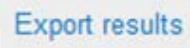
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AppState Careers User Guide List

ASU has developed some user guides that are available on the HRS website/Managers & Supervisors tab/AppState Jobs link/AppStae 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