

# User Guide



## INTRODUCTION

.....

The Human Resources department has implemented this system in order to automate many of the tasks of the employment application process.

You will use this system to complete four main tasks:

- 1) Review Requisitions
- 2) Search and Review Applicants
- 3) Communicate electronically with HR Administrators, Hiring Managers, Applicants, and others involved in your hiring process

PeopleAdmin, Inc. has provided these training materials to assist your understanding of this system. If you have any questions, please email [askpa@peopleadmin.com](mailto:askpa@peopleadmin.com)

### Your Web Browser

PeopleAdmin Hire supports the following browsers:

- Chrome (self-updating)
- Firefox versions currently supported by the vendor
- Internet Explorer version 9 and later
- Safari versions currently supported by the vendor

When an issue arises with a supported browser version, PeopleAdmin will consider fixing it in an upcoming release. Issues related to browser versions that are no longer supported will not be addressed.

The site also requires you to have Adobe Acrobat Reader installed. This is a free download available at [www.Adobe.com](http://www.Adobe.com).

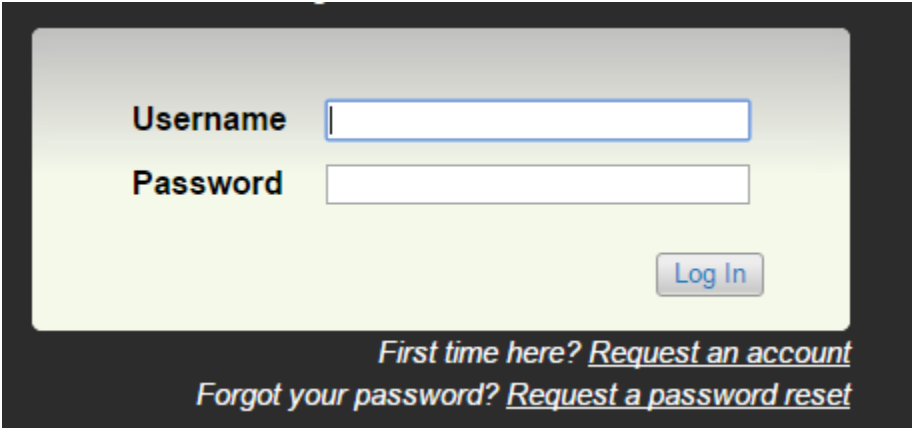
### Security of Applicant Data

To ensure the security of the data provided by applicants, **the system will automatically log you out after 60 minutes if it detects no activity.** However, anytime you leave your computer we strongly recommend that you save any work in progress and log out of the system by clicking on the logout link located on the bottom left side of your screen.

**GETTING STARTED**

After entering the URL, the “login screen” for the system will appear and should be similar to the following screen:

(applicant portal = not yet branded )



**Users**

Currently we have one USER set for you to begin exploring:

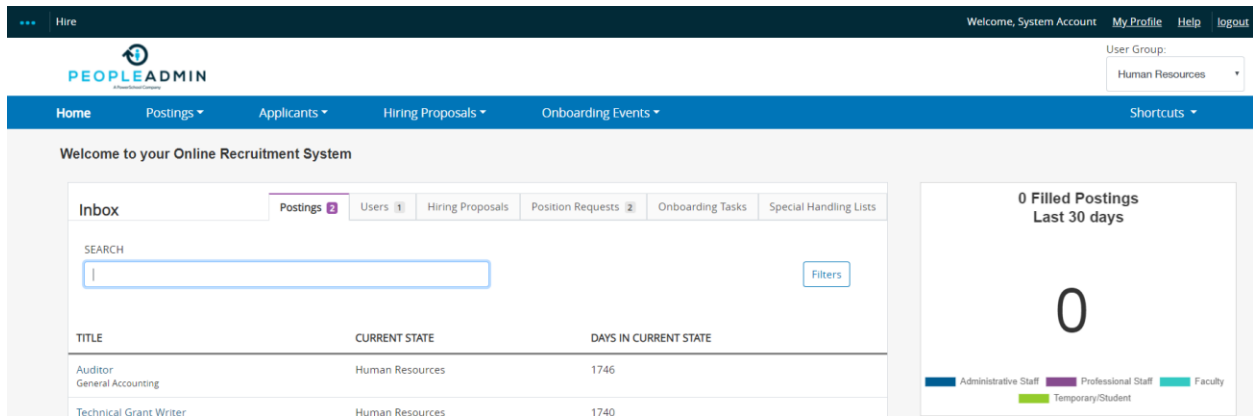
humanresources – assigned to all user groups

password is set to - password

The following is a list of some of our Best practices User Group Names.

Best Practice User Groups (may or maynot be used)	User Names
Applicant Reviewer (personal scope)	
Budget (Org Scope)	
Chancellor/President (Org Scope)	
Dean/Department Head (Dept Scope)	
EEO/AA Officer (Branch/Location/Campus Scope)	
Employee (Personal Scope)	
Guest (Personal Scope)	
Human Resources (Org Scope)	
Provost (Org Scope)	
Search Chair/Manager (Personal Scope)	
Search Committee Members (Personal Scope)	
Vice Chancellor/Vice President (Division Scope)	

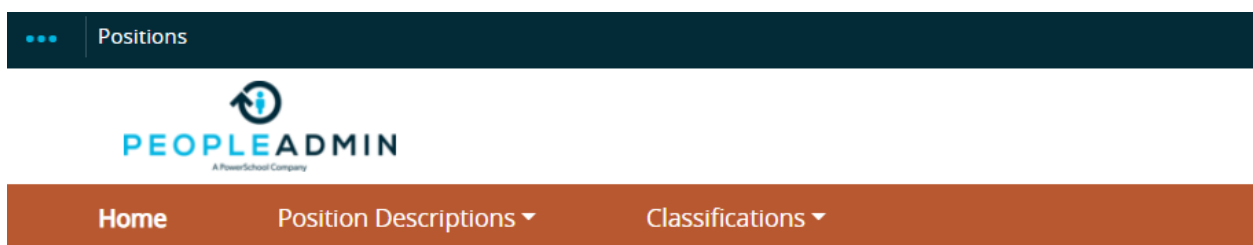
Once you have logged in The Welcome Screen appears after you log in, and should appear similar to the following screen:



Hover over to the 3 dots ... at the top left side of the screen and first select **“Positions”**



## Positions



### Position Descriptions

Hover over the *Position Descriptions* tab and click the *appropriate position type* option.

*This takes you into the Position list screen where you can create new positions or manage existing positions.*

○

- **To Create a New Position Description:** Click orange *Create New Position Description* this bring you to the Position Settings Page

## Administrative Staff Position Descriptions

[+ Create New Position Description](#)

1. You will need to Enter a **Title and Org Unit information** as these are required fields, once you have completed that then click **Start Position Request (Upper right Side of page)**  
Note: You can choose to Clone an Existing Position Description.
2. **Position Justification** - *enter appropriate information here* (All fields with orange asterisks are required fields.)
3. **Classification** – Select a classificaion checking one of the radial buttons. click Next
4. **Position Details** Continue making sure to complete all astericked areas
5. Continue throught all the remaining tabs .
6. **Position Summary** -Review the information – you can edit the information .
7. Begin to move through the workflow via the **Take Action on Position Request** button.

### Create Position Description

#### 1. Title and Org Unit Information

System Account, you have 1 message. Current Group: | Omnipotent | logout

Position Descriptions / Faculty / Professional Staff / New Position Description

New Position Description [Start Action](#) [Cancel](#)

Job Title \*

**Organizational Unit**

Division \*

College \*

Department \*

Clone an existing Position Description?

Filter these results

Position Title	Position Number	First Name	Last Name	Department	Supervisor	Actions
Vice President, Student Affairs	120092			VP Student Affrs.		

## 2. Position Justification

Actions / ... / New Position Description / test9 / Edit

Position Justification

Save Next >>

Check spelling

\* Required Information

Position Justification

Justification of Need

This field is required.

Save Next >>

## 3. Classification

Classification

Position Details

Position Budget Inform...

Supervisory Position

Position Documents

Position Request Summary

Classifications - Filter these results

All Classifications

"All Classifications" 92 X Delete this search?

← Previous 1 2 3 4 Next →

Classification Title	Classification Code	Classification Status	(Actions)
Accountant	10751	Approved	Actions

## 4. Position Details

Position Details

Position Budget Inform...

Supervisory Position

Position Documents

Position Request Summary

Check spelling

\* Required Information

Classification Details

Classification Title: Fac Maint Tech - Bldg Trd

Classification Code: 17422

FLSA: Non-Exempt

Salary Grade: A

Min Salary: \$29,844

Mid Salary: \$36,022

Max Salary: \$44,163

Required Qualifications: High school diploma or equivalency; or demonstrated possession of the competencies of assignment may be substituted on a year-for-year basis.

Position Information

\* Position Title: Maintenance Technician-kl

Position Number:

## 5. Move thru the remaining tabs

## 6. Position Summary Review



### New Position Description: Maintenance Technician (Administrative Staff) [Edit](#)

Current Status: Draft

Position Type: **Administrative Staff**

Department: **Custodial and Grounds Services**

Created by: **System Account**

Owner: **System Account**

Summary | History | Settings

#### ✔ Position Justification [Edit](#)

Position Justification

Justification of Need	New position Currently: blank
-----------------------	----------------------------------

#### ✔ Classification [Edit](#)


Classification Information

Classification Title	Fac Maint Tech - Bldg Trd
Classification Code	17422
FLSA	Non-Exempt
Salary Grade	A
Min Salary	\$29,844
Mid Salary	\$36,022

## 7. Take Action on Position Request

Take Action On Position Request ▼

 Print Preview

 Add to Watch List

## WORKFLOW

To move the Position Description along in the workflow, hover over the orange **Take Action on Position Request** button and choose the action that you would like to take.

When you transition the position request, you will have the opportunity to add a comment, which will appear in both the email that the state owner receives and in *the history of the*

position request. You can also flag it to appear on your watch list by clicking on the add to Watch list flag before moving it in the workflow.

When you flag an item to Add to your watch list it displays the position request in the Watch List on your home screen.

**Homework: Create 5 New Positions in** the sandbox site provided. Please put your initials at the end of your Position Title. \*\* Be sure you assign the Test User as the Search Chair in the Search Chair field on the Position Details field. Do the same for Faculty. Faculty has the same workflow so you should be able to follow along with the above directions.

## To Modify Existing Position

### Position Descriptions

Hover over the **Position Descriptions** tab and click the appropriate position type option.

This takes you to the Position list screen where you can search for the existing positions you wish to Modify.

## Modify Position Description


### Administrative Staff Position Descriptions

Position Title	Position Number	Employee First Name	Employee Last Name	Supervisor
Accountant	AS10001	Ben	Veney	Accounting Manager (Bernis Turner)
Accountant	AS10002	Bennie	Urey	Accounting Manager (Bernis Turner)
Accountant	AS10003	Benny	Urdas	Accounting Manager (Bernis Turner)
Accountant	AS10004	Bernadette	Underwood	Accounting Manager (Bertha Turkson)

Locate the position you just created then hover over the **Action button** and select **view**.



You can now view the positions you just created, Next click on **Modify Position Description**.


 **Position Description: Maintenance Technician (Administrative Staff)** [Edit](#)

Current Status: Active

Position Type: Administrative Staff

Department: Custodial and Grounds Services

Take Action On Position Description ▾

-  Print Preview
-  Print Preview (Employee View)
-  Modify Position Description

Then click **Start** on the next page. Go through the modify action following the workflow until you reach Approved.

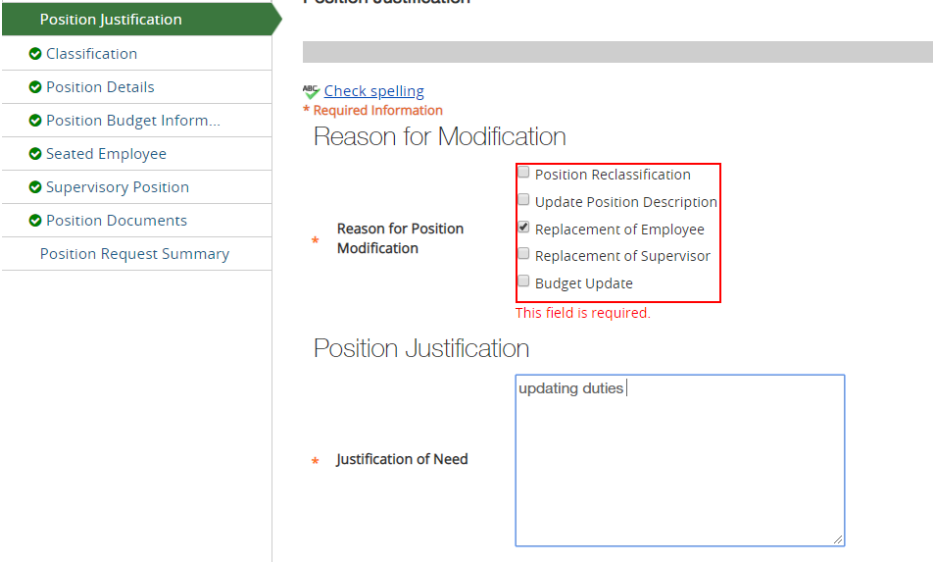
[Position Descriptions](#) / [Faculty](#) / [Professional Staff](#) / [Modify Position Description](#)

## Start Modify Position Description Action on test9?

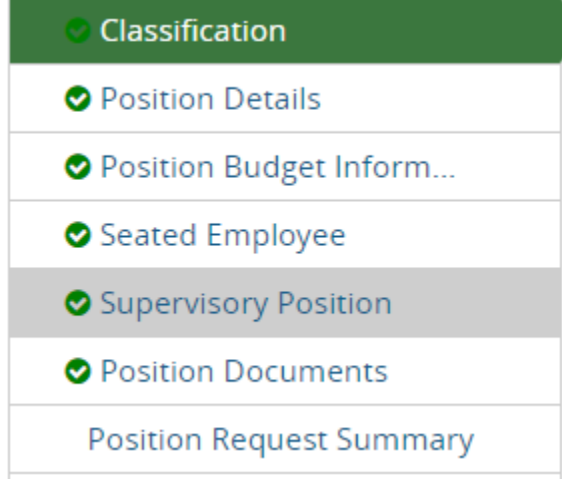
Once it has been started, this action will lock the position description from other updates until the action has completed.

[Start](#)

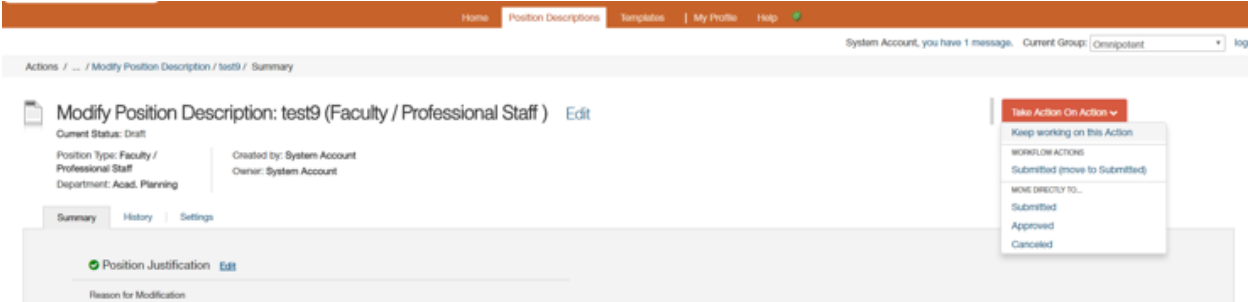
**1. Position Justification - Complete all required areas - Click next**



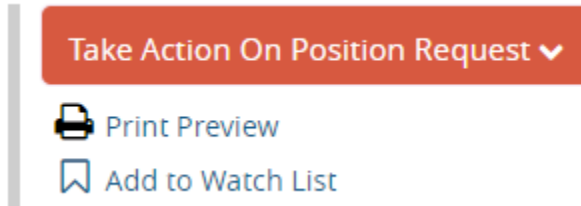
**2. Continue to moving through the Modication action making an changes you would like**



**3. When you are done review the Summary.**



4. To move the Position Description along in the workflow, hover over the orange **Take Action on Position Request** button and choose the action that you would like to take.



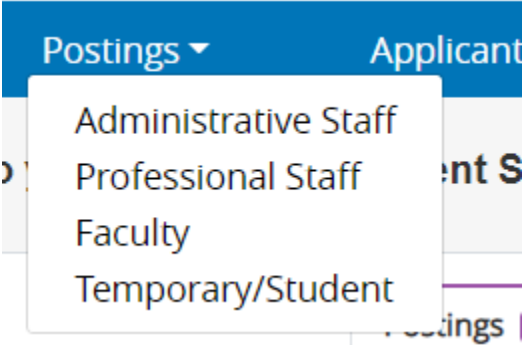
**Homework: Modify the 5 Positions you created** positions **in** in the training site being provided. Please put your initials at the end of your Position Title.

## Postings/Requisitions

To Start a Posting -make sure your are in the **Hire Module**



To create a new posting, click on Postings from the top menu and select the appropriate position type



Then click on the Orange Create New Posting button.

### Administrative Staff Postings



## Create Options

You will then be prompted to create your posting from a **variety of options**.

Create New
✕

### What would you like to use to create this new posting?

**Note:** You are creating this posting as System Account not Jane Doe.

**Create from Position Type**

Includes only the information that applies across the entire Position Type. A new Posting from a Position Type is almost completely blank.

**Create from Posting**

Uses an existing posting as a template and automatically copies in most information.

**Create from Position Description**

Copies in most of the information from a position description.

**Note :** If you are **Customer using Positions** –select Create from **Position Description**

If using this option you will then need to select the correct position. Then go to the action button and click on **Create From**

Bus. and Tech. App. Analyst
AS10030
Carter
Summers
Chief of Staff (Mark Didlake)
Operations
Actions ▾

← Previous
1
2
3
Next →

View  
Create  
From

If you are a **Hire only customer** -Select **Create from Position Type**

## Posting Settings Page

Depending on which choice you selected, you will now come to the Postings Setting page Enter the **position title** if it is not already populated and enter the division and department of the posting if not already populated.

You will also need to select the **Applicant Workflow step** (that is the first step in your applicant process) Defined as: When an applicant applies for a position who or where does there completed application go first .

New Posting Create New Posting Cancel

*\* Required Information*

Position Title \*

**Organizational Unit**

Branch \*

Division \*

Department \*

**Applicant Workflow**

Workflow State

When an application is submitted for this job, it should move to which state in the Candidate Process workflow?

When you have completed filling out that information, click on the **Orange Create New Posting** button.

You will then come to the **Position Details** page, the first page of the Posting. Fill out the fields on the form.

system account, you have 1 message. current group: Human Resources | 109

Postings / Faculty / Professional Staff / test1111 (Draft) / Edit: Posting Details

**Editing Posting**

- Posting Details
- Guest
- Applicant Documents
- Posting Documents
- Supplemental Questions
- Summary

**Posting Details** Save Next >>

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Check spelling

*\* Required Information*

**Position Information**

Posting Number

\* Job Title

EEO Job Group

Position Number

**Fields with an Asterisk (\*)** are required, just like on the position so if you do not include information in the field, an error message will appear and you will be required to complete it.

**TIP:** Certain fields you enter on this screen will appear on the applicant site exactly as you enter it on this screen, so please proofread carefully.

Continue to move through all the tabs on your Posting, completing the information on each tab. **Note : The Tabs may vary depending on your unique system.**

<b>Editing Posting</b>
✔ Position Details
✔ Budget Information
✔ Supplemental Questions
✔ Applicant Documents
✔ Internal Documents
✔ Guest User
Summary

## Adding Supplemental Questions

Supplemental /Posting Specific (screening) Questions are individual questions that can be used to qualify/disqualify candidates, or rank applicants based upon a score. You may create those questions in this section.

Postings / Faculty / Professional Staff / test1111 (Draft) / Edit: Supplemental Questions

Editing Posting

- ✔ Posting Details
- ✔ Guest
- ✔ Applicant Documents
- ✔ Posting Documents
- ✔ Supplemental Questions
- Summary

**Supplemental Questions** Save << Prev Next >>

Included Supplemental Questions Add a question

Position	Required	Category	Question	Status	
1	<input type="checkbox"/>	Uncategorized	How did you hear about this employment opportunity?	active	✕

Save << Prev Next >>

If you are not adding any Screening Questions, click the **Next** button.

To add a Screening Question to a Posting click on the **Add a Question** button, which returns the following page:

Add a Question
✕

**Available Supplemental Questions**

Category:  Keyword:

Add	Category	Question
<input type="checkbox"/>	Education	Do you have a bachelor's degree?
<input type="checkbox"/>	Education	What is the highest level of education attained?
<input type="checkbox"/>	Education	What is the highest level of education attained?
<input type="checkbox"/>	Experience	How many years of experience do you have in this type of position?
<input type="checkbox"/>	Education	What is your highest level of completed education?
<input type="checkbox"/>	Experience	Please list any prior "ROLE" experience.
<input type="checkbox"/>	Uncategorized	Please select any of the following certifications that apply.
<input type="checkbox"/>	Uncategorized	Do you have significant experience with the following applications?
<input type="checkbox"/>	Experience	How many years of experience do you have in ...?
<input type="checkbox"/>	Education	1.) Do you have a doctoral degree in life sciences?
<input type="checkbox"/>	Experience	2) Do you have a minimum of 10 years of professional experience in agricultural or environmental leadership?
<input type="checkbox"/>	Experience	3) Do you have demonstrated experience with Agricultural Experiment Station programs?
<input type="checkbox"/>	Experience	4) Do you have demonstrated outreach experience such as event management, media relations, and program development, implementation and management?
<input type="checkbox"/>	Experience	5) Do you have demonstrated success in grant development?
<input type="checkbox"/>	Experience	6) Do you have demonstrated record of peer- reviewed publications related to outreach programs or development of official publications related to agricultural or environmental programs?

Displaying 1 - 15 of 2363 in total  
 ← Previous | Next →

Can't find the one you want? Add a new one

The first step is to search existing questions. You can enter a keyword to search the question text (or leave the field blank). The system will return a list of all questions that have been entered previously by Human Resources or Hiring Managers for other Requisitions. Select one of the questions from the list if it is appropriate for this Requisition.

If you do not find an applicable sample question from the list, you may create a question from scratch by clicking on the **Add a Question** link at the bottom of the Search Results screen.



Add a Question ✕

Questions defined here will be "pending" approval and will not be available for use in other areas of the system until they have been approved.

Name \*

Status \*

Category

Question \*

**Possible Answers**

Open Ended Answers

Predefined Answers

**Step 1:** *Please enter question name, status, category and question text* Enter the text of the question you wish to ask all candidates who will apply to this Posting. (Only HR will be able to change the status of question, all other user groups will have their question at a "Pending" status awaiting HR's approval.

**Step 2:** *Please select answer type:* select either Open Ended or Predefined Answers – described in the following sections.

**Step 3:** Enter answer choices or select answer format based upon your selection in step 2.  
Adding Closed Ended Questions

Closed Ended questions require a multiple-choice answer. For example:

***Do you have experience working in an office environment?***

**Possible Responses: Yes or No**

Name \*

Status \*

Category

Question \*

**Possible Answers**

- Open Ended Answers
- Predefined Answers

Empty answers will be excluded.  
Click and drag possible answers to reorder them.

Possible Answer 1:  x

Possible Answer 2:  x

Possible Answer 3:  x

After selecting the “Closed Ended” radio button, enter the answer choices that candidates can choose from in the boxes labeled “Possible Responses”. In this case, you would enter:

1. *Yes*
2. *No*

### Adding Open Ended Questions

Open Ended questions do NOT require a multiple-choice answer. For example:

***Describe any work experience relevant to this position.***

Add a Question x

Questions defined here will be "pending" approval and will not be available for use in other areas of the system until they have been approved.

Name \*

Status \*

Category

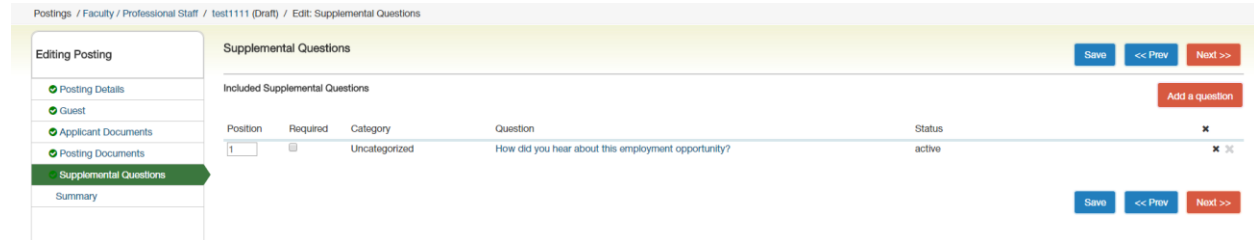
Question \*

**Possible Answers**

- Open Ended Answers
- Predefined Answers

The next step is to click on the **Submit** button at the bottom of the screen. This attaches the question to the Posting/Requisition, and every applicant who applies to this Posting/Requisition will be asked this question.

After you click **Submit Question**, you should see a screen similar to the following. This screen summarizes the question(s) you have entered. As you enter additional questions, they will be added to this summary screen.



Postings / Faculty / Professional Staff / test1111 (Draft) / Edit: Supplemental Questions

Editing Posting

- Posting Details
- Guest
- Applicant Documents
- Posting Documents
- Supplemental Questions**
- Summary

Supplemental Questions

Save << Prev Next >>

Included Supplemental Questions

Add a question

Position	Required	Category	Question	Status	
1	<input type="checkbox"/>	Uncategorized	How did you hear about this employment opportunity?	active	x

Save << Prev Next >>

From this screen you may continue to add more questions by clicking the **Add a Question** button. You may also delete a question you have entered by clicking the x next to the relevant question.

You also have the ability to **Require** an applicant to provide an answer to the question you added. The applicant will not be allowed to proceed without answering a question with the “Required” status. To require the question, check the required box.

If you wish to make a question a disqualifying question or to assign points to responses, click on the question link it .

When you click on the question, you will see the screen above where you can mark a selection disqualifying by checking the box or you can assign points to a particular response. This is often done to help find the most qualified candidates quickly. You do NOT have to use this functionality to use supplemental questions.

Position	Required	Category	Question	Status
1	<input type="checkbox"/>	Uncategorized	How did you hear about this employment opportunity?	active

Possible Answers: Predefined Options

	Answer	Points	Disqualifying
1.	Public Job Posting	<input type="text"/>	<input type="checkbox"/>
2.	Internal Job Posting	<input type="text"/>	<input type="checkbox"/>
3.	Agency Referral	<input type="text"/>	<input type="checkbox"/>
4.	Advertisement/Publication	<input type="text"/>	<input type="checkbox"/>
5.	Personal Referral	<input type="text"/>	<input type="checkbox"/>
6.	Website	<input type="text"/>	<input type="checkbox"/>
7.	Other	<input type="text"/>	<input type="checkbox"/>

When you have finished adding screening questions for this Requisition, click the **Next** button.

## Applicant Documents /Documents Needed to Apply

On this screen, you will designate the documents that will be necessary for applicants to apply to this posting. You can make this determination on a posting by posting basis. If a document is optional, select the Optional radio button, if it is required, select the Required radio button.

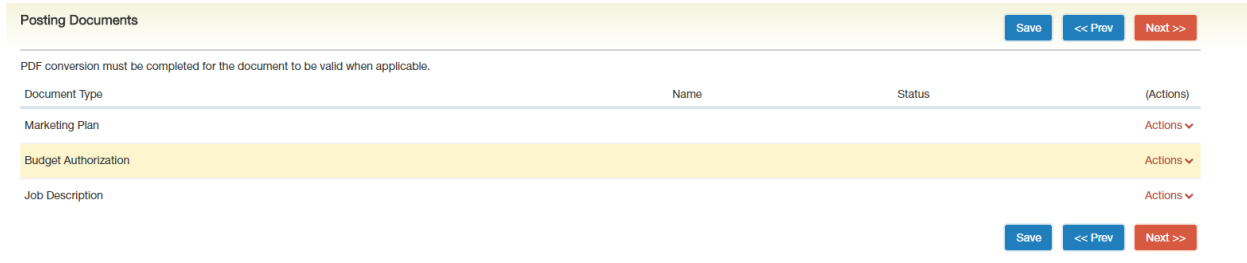
Applicant Documents Save << Prev Next >>

Order	Name	Not Used	Optional	Required
1	Resume	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
2	Cover Letter/Letter of Application	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
3	Statement of Teaching Philosophy	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
4	Writing Sample	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
5	Certificate of Proficiency	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
6	Other Document	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
7	Curriculum Vitae	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
8	Media Sample	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
9	Required License	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Save or Cancel Save << Prev Next >>

## Posting Documents

On this screen, you may add documents that you wish to internally add to the posting. To attach a document, click on the blue action button next to the document name. From there you will be able to browse and attach the document to the posting.



The screenshot shows a 'Posting Documents' interface. At the top right, there are three buttons: 'Save' (blue), '<< Prev' (blue), and 'Next >>' (red). Below this is a note: 'PDF conversion must be completed for the document to be valid when applicable.' A table follows with columns for 'Document Type', 'Name', 'Status', and '(Actions)'. The table contains three rows: 'Marketing Plan' with an 'Actions' dropdown, 'Budget Authorization' with an 'Actions' dropdown, and 'Job Description' with an 'Actions' dropdown. At the bottom right, there are three buttons: 'Save' (blue), '<< Prev' (blue), and 'Next >>' (red).

## Search Committee Members

Search Committee is a special user group that can be assigned to users that you already have in your system for the sole purpose of being able to see a posting they have been assigned to and review the applicants that have applied to that posting.

Search committee members can then log in with their normal user log in and view only the postings they have been assigned to.

Once you have users assigned then you can Click on Add Existing User and a list of Search Members will appear.

## Search Committee Members

No Search Committee Members have been assigned to this Posting yet.



Two blue buttons are displayed side-by-side: 'Add Existing User' and 'Create New User Account'.

You can also, simply type in the name of the user you wish to add as a search committee member and then click on Add Member.

If you wish to make them the Committee Chair, check the Make Member The Committee Chair box.

## Activating Guest Users

Guest Users are only able to view the applicants to the Posting(s) to which they are assigned, and are not permitted to take action on any of the applicants. Also, Guest Users are only able to view the Postings(s) to which they are assigned. When the Posting is filled, the guest user name and password are automatically deactivated. This feature can be used for individuals who are not users in the PeopleAdmin system.

**Guest User** Save << Prev Next >>

Click on the **Create Guest User Account** button. The system will automatically generate a Guest Username. You may update the password if needed.

You can also notify the members of the review committee by adding their email address in the **Email Address of Guest User Recipients**. Each email address must be on a separate line. Once you have added all of the email addresses, click on the **Update Guest User Recipient List** to notify the review committee users.

When finished or to skip this section, click the **Next** button.

**Want to give guests access to view this posting?**

[Create Guest User Account](#)

Save << Prev Next >>

To add a Guest User Click on the Create Guest User, the system will generate a Username and the password will also auto generate. If you want to change the password, update the password and then click on Update Password.

You will then enter the email addresses of anyone you want to send the guest user credentials to and when finished, you would click on the Update Guest User Recipient List.

When done on the Guest User page, click on the orange Next button.

**Guest User** Save << Prev Next >>

Click on the **Create Guest User Account** button. The system will automatically generate a Guest Username. You may update the password if needed.

You can also notify the members of the review committee by adding their email address in the **Email Address of Guest User Recipients**. Each email address must be on a separate line. Once you have added all of the email addresses, click on the **Update Guest User Recipient List** to notify the review committee users.

When finished or to skip this section, click the **Next** button.

**Guest User Credentials**

Guest users may view this posting by using these credentials.

Username  
gu0200

Password  
941931 [Update Password](#)

**Email Addresses of Guest User Recipients**

Email addresses (one per line)

[Update Guest User Recipient List](#)

When you reach the end of your Posting ,the system will then bring you to a summary page where you can review the posting and then move to the next level approver.

System Account, you have 1 message. Current Group: Human Resources

Postings / Faculty / Professional Staff / test1111 (Draft) / Summary

**Posting: test1111 (Faculty / Professional Staff)** [Edit](#) [Delete](#)

Current Status: Draft

Position Type: Faculty / Professional Staff  
 Department: Undergraduate Admissions

Created by: System Account  
 Owner: System Account

[Summary](#) | [History](#) | [Settings](#) | [Hiring Proposals](#) | [Background Checks](#)

Please review the details of the posting carefully before continuing.

To take the action, select the appropriate Workflow Action by hovering over the orange "Take Action on this Posting" button. You may add a Comment to the posting and also add this posting to your Watch List. In the popup box that posting, click on the **Submit** button on the popup box.

To edit the posting, click on the **Edit** link next to the **Section Name** in the Summary Section. This will take you directly to the Posting Page to Edit. If a section has an orange icon with an exclamation point, you will need to review this section before moving to the next step in the workflow.

✔ **Posting Details** [Edit](#)

Position Information

Posting Number	
Job Title	test1111

Take Action On Posting ▾

Keep working on this Posting

**WORKFLOW ACTIONS**

Cancelled (move to Posting Cancelled)

Request AA Review (move to Alternative Action)

**MOVE DIRECTLY TO:**

Human Resources

Alternative Action

HR Final

Approved - Pending

Posted

Approved - Internal

Reposted

Closed/Removed from Web

Filed

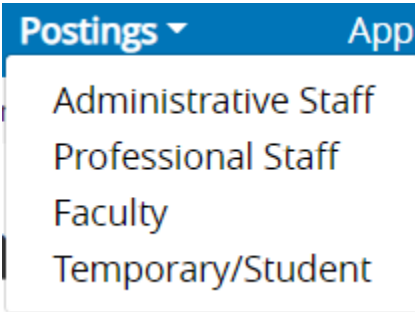
Posting Cancelled

Extended Posting

The system will generate an email to the next approver and this posting will appear in their inbox for their approval. The posting will continue through the approval process until it reaches the final step at Human Resources where you will **Post Position** .

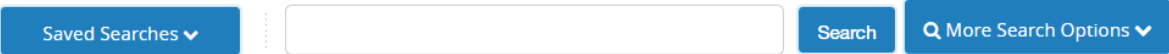
## SEARCHING POSTINGS

To search for postings in the system, you will go to the Posting tab on the top menu and select the appropriate position type. The system will return your default posting search results.

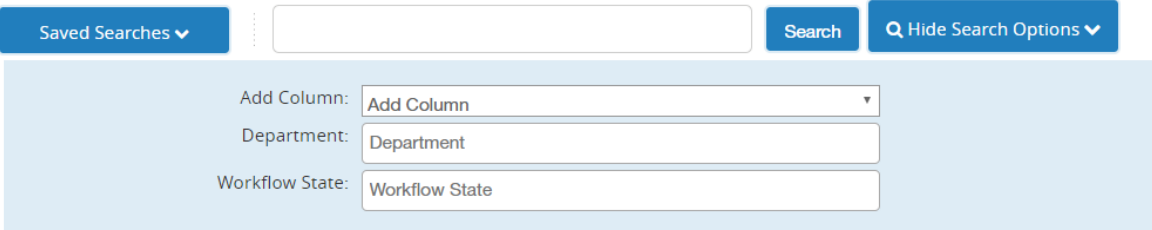


You can customize your search results based on how you wish to view the posting data.

There is a key word search where you can type in a word and search for the posting. Our most common fields are indexed to return in a keyword search.



If you click on More Search Options you can use the **Add Column feature** which allows you to add additional fields to your search results.

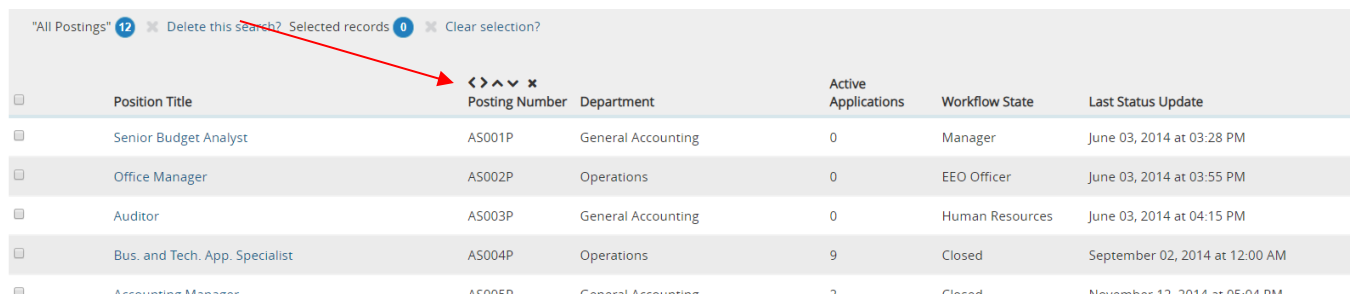


### To search for items on a page

1. The **text search box** allows you to search for specific words or names.



2. Select **More search options** to expand the search tools area.
  
3. Use the searching and filtering tools to narrow down the results that the system presents:
  - You can **add columns** if the information you need is not included on the page.
  - Use **advanced filters** (if any are available) to narrow down the results.
  
4. Use the column controls to organize and sort the search results:
  - **Move a column to the left or to the right** using its left and right controls.
  - **Delete a column** using its **delete** control if you do not want to display it. If you need to add it back later, use the **add columns** control to do so.
  - **Order the search results by sorting a column** in ascending or descending order using its up and down controls.



The screenshot shows a table with the following columns: Position Title, Posting Number, Department, Active Applications, Workflow State, and Last Status Update. A red arrow points to the column control icons (left and right arrows) above the 'Posting Number' column header.

Position Title	Posting Number	Department	Active Applications	Workflow State	Last Status Update
Senior Budget Analyst	AS001P	General Accounting	0	Manager	June 03, 2014 at 03:28 PM
Office Manager	AS002P	Operations	0	EEO Officer	June 03, 2014 at 03:55 PM
Auditor	AS003P	General Accounting	0	Human Resources	June 03, 2014 at 04:15 PM
Bus. and Tech. App. Specialist	AS004P	Operations	9	Closed	September 02, 2014 at 12:00 AM
Accounting Manager	AS005P	General Accounting	0	Closed	November 13, 2014 at 05:04 PM

You can use all these tools in any order.

### Search tips

- Text search is not case sensitive.
- Searches normally return items that contain all your search terms. For example, if you enter **facilities manager**, the search returns items that contain both these words.
- To exclude search results, use the - character. For example, to search for postings that contain the word "director" but not "athletic", enter **director !athletic** or **director - athletic**, placing a space before the ! or - character.
- To search for a phrase that contains a dash or a space, enclose the entire phrase in quotation marks: **"director - athletic"**.

- **You can't do a search** that only specifies what not to return, such as **!coordinator**.
- **You can't do a search** for a word or phrase that was selected from a drop-down list, such as the name of a state, but you can use **filtering** to find the information. The procedure below for viewing applicants who reside in a specific state gives an example of how to do this.

## To search for a specific applicant

**Applicant** is a customizable term. Common synonyms: **candidate** or **job seeker**.

1. In the **Hire module**, select Applicant Search from the **Applicants Area**



2. You can enter the applicants last name in the Search area and click Search



3. Select **More search options** to expand the search tools area.
4. Use the searching and filtering tools to narrow down the results that the system presents:
  - You can **add columns** if the information you need is not included on the page.

When you search for applicants by name, your search results include all applicants who included the name anywhere in their applications.

Sorting the results by applicant name can help you find the person you are searching for.

4. From the **Add column** menu, select **(Applicant Detail Parent) Lookup State**. This adds a column to the table of applicants, showing the state listed in each person's address.
5. Use the ascending or descending order sorting control associated with the new Lookup State column to group applicants by state.

## To export search results

2. From the Actions menu, select **Export Results**. The search results are saved in .xls format. Depending on your browser, the file may automatically download to your

computer's download folder, or you may be prompted to choose whether you want to open or save the file.

## To save a search

When you save a search, you have the option to set it as your default search. This is your only opportunity to set it as the default search.

People with administrative access can share saved searches by tagging them as:

**Personal – Group or Global searches.** Non-administrative(HR) users can only save personal searches.:

1. After you have used the search and filtering controls to present the search results the way you want to see them, select **Save this search**. The Saved Search area expands.
2. Give the search a name that will help you remember its purpose.
3. Select one of these:
  - **Personal Saved Search** – Only you will have access to this search.
  - **Group Saved Search** – The search will be available to all users within the groups that you specify. Select at least one group from the list that appears when you select the Group Saved Search option. To select more than one group, hold down the Ctrl key while you select the groups.
  - **Global Saved Search** – The search will be available to all users within your organization.

Name

Personal Saved Search  Group Saved Search  Global Saved Search

Make it the default search?

Overwrite Saved Search:

4. If this search presents the information you will normally want to see when you navigate to this page, you may want to select **Make this the default search**.
5. Select **Save this search**. The search tab refreshes to present the name you have given the search. This tab remains available for the rest of your session. The next time you log in, the search is available from the list of saved searches in that area.

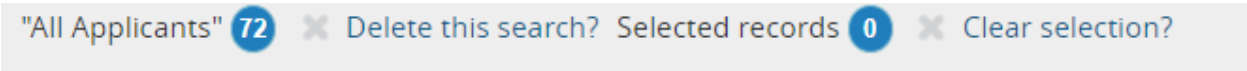
You can delete your personal saved searches when they are no longer useful to you.

### To run a saved search

1. Access the list of items you need to search.
2. From the **Saved Searches** menu, select the search you want to run. A new tab presents the search results.

### To delete a saved search

1. Access the list of items you need to search.
2. From the **Saved Search** menu, select the search you want to run. A new tab presents the search results.
3. Select the **Delete this search (X)** control placed just after the name of the search and the number of search results returned. A message asks you to confirm that you wish to delete the saved search.

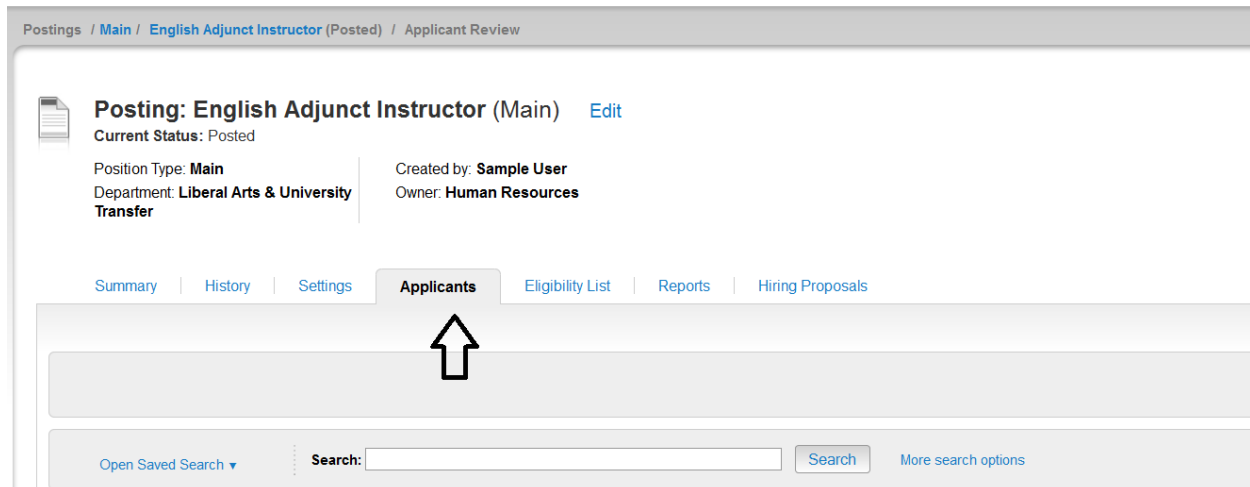


"All Applicants" 72 X Delete this search? Selected records 0 X Clear selection?

### Reviewing Applicants

**Postings** – Select from the Posting menu.

Locate the posting that you wish to review applicants on and open it to the **Applicants** tab.



## To see who has applied to a posting

Open the **Applicants** tab to open the list of applicants.

## To view an application

Click on the **Applicants Last Name** or hover the **Action button** and click **View Application**

## To view one applicant's application materials together

1. If the list of applicants does not include the Documents column, select **More Search Options** and add it from the Add Column list. The list of applicants refreshes.
2. For the applicant of interest, select **Generate** or **View** in the Combined Document column, depending on which is available. **Generate** creates an up-to-date PDF. **View** presents the PDF of the applicant's most recent application materials in a new tab of your browser.

The supplemental questions section indicates whether the applicant passed the qualification group questions, if there were any on the posting.

## To view a collection of applicant documents

You can review more than one applicant document at a time. You may choose to view all the documents for an applicant, specific applicant documents for each of a group of applicants, or all applicant documents for a group of applicants.

1. On the posting's **Applicants** tab, check the boxes to select the applicant or applicants of interest.
2. Do one of these things:
  - See the selected applicants' materials together: From the **Actions** menu, select **Download Applications as PDF**. In the dialog box, select the types of documents you want to view, then select **Submit**.
  - See the selected applicants' materials separately: From the **Actions** menu, select **Create Document PDF per Applicant**.

The system creates a PDF containing all the documents that you request.

## Changing the Status of Applicants

While reviewing an application, you can change the status of applicants as you review their credentials, interview them, and make a final decision. To change the status of one applicant, click the “Take Action on Job Application” button.

Postings / ... / [English Adjunct Instructor \(Posted\)](#) / [Applicant Review](#) / Thomas Thumbson Under Review by HR

**Job application: Thomas Thumbson (Main)**  
 Current Status: Under Review by HR  
 Application form: Application

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Full name: Thomas Thumbson Address: 123 West Rd Paris, CT Username: <b>Tom Thumb</b> Email: <b>tt2@aol.com</b> Phone (Primary): Phone (Secondary): Position Type: <b>Main</b> Department: <b>Liberal Arts &amp; University Transfer</b>	Created by: <b>Thomas Thumbson</b> Owner: <b>Human Resources</b>
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Take Action On Job Application ▾

WORKFLOW ACTIONS

- Keep working on this Job application
- Do Not Select (move to Not Hired)
- Select for Further Review (move to Under Review by Committee)

MOVE DIRECTLY TO...

- Draft
- Under Review by Committee
- Interview
- Recommend for Hire/Unit VP
- Finalist
- Hired
- Not Hired
- Interviewed, Not Hired
- Recommended, Not Hired
- System Det Does Not Meet Minimum Qualifications
- Withdrawn
- Special Handling List

**Summary** | [Recommendations \(0 of 0\)](#) | [History](#)

🔵 **Personal Information** [Edit](#)


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Contact Information

## Changing the Status of Multiple Applicants

### *To move a group of applicants to a new workflow state*

1. From the list of all applicants on the posting, check the boxes associated with the applicants of interest.
2. From the **Actions** menu, select **Move in Workflow**. The Editing Workflow States page opens.
3. Do one of these things:
  - Use the Change for all applicants box to select the workflow state for all the applicants you selected, or
  - For each applicant listed on this page, select the new workflow state.
4. If required, select the reason that best explains why you are moving the applicants in the workflow. You can select a reason for each applicant even if you moved all of them in the workflow together.
5. When you have moved all applicants to the appropriate workflow states, select **Save Changes** to update them.

 Editing: Workflow States for 1 Applicant

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**Change for all applicants**

Applicant	Current State	New State	Reason
Thomas Thumbson	Under Review by HR	<input type="text" value="Select a workflow state..."/>	

or [Cancel](#)

## Hiring Proposals

When an applicant has gone through the evaluation process and becomes the finalist/selected candidate, **a link to begin the hiring proposal will appear**. The specified user will be able to begin the hiring proposal by selecting the Start Hiring Proposal link.

/ Applicant Review / Thomas Thumbson Finalist

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**Thumbson (Main)**

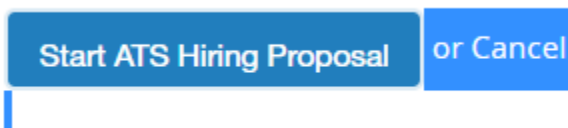
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Created by: **Thomas Thumbson**  
Owner: **Dean/Department Head**

Take Action On Job Application ▾

- ★ View Posting Applied To
- ★ Preview Application
- 📄 Edit Application
- ➕ Start Hiring Proposal ←
- 📄 Reactivate

Next step Click on Start Hiring Proposal  
You may have 2 types of Hiring Pro



### To approve a hiring proposal or move it in the workflow

1. From the **Hiring Proposals** menu, select the appropriate position type.
2. Locate and open the hiring proposal for the applicant of interest.
3. Open the **Take Action on Hiring Proposal** menu and move it to the appropriate workflow state. A confirmation box opens.
4. If required, provide an explanation for moving the applicant to this workflow state.
5. Select **Submit** to move the hiring proposal to the selected workflow state.

Your organization's process determines how the offer is generated and presented to the applicant.



### To print a hiring proposal

1. Locate the hiring proposal and open it for viewing.
2. Select **Print Preview**. The system presents a printable view.
3. Use your browser's Print feature to print the document.
4. Use your browser's Back button to return to the main view of the hiring proposal.

When the hiring proposal is finalized, the applicant will be moved to Hired.

At this point, you will want to go to the Posting and move it to filled. This will complete the close out process of your posting in PeopleAdmin.

