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To access PeopleAdmin, you will need your University ODIN username and password. You should see the secure login screen below. Click on the “SSO Authentication” link below the login box and use your ODIN username and password.

You may also locate the PeopleAdmin login link from the “Manager’s Corner” Easy Access table on the Human Resources web site (http://www.pdx.edu/hr/managers-corner).

If you have any questions, please contact your HR Partner in the Office of Human Resources.
Once you are logged into PeopleAdmin the “Home” page will display an “Inbox,” “Watch List,” and other links where you can easily navigate to the requests that need your attention. Below is a detailed list of the home page functions available:

**Inbox**
Displays all items requiring your attention (approval/review).

**Watch List**
Displays any request you have added to your watch list (Postings, Hiring Proposals, Requests) for easy access.

**My Profile**
Used to update your user account details and online help for using the system.

**Help**
Used to toggle between the Hire and Positions modules.

**User Group**
Displays the user group choices available to you.

The system notification at the top of the screen will indicate your current user group view and other important messages.
Module Type Definitions

Positions (orange banner) used to:
- View position descriptions
- Print position descriptions
- Create new position descriptions
- Request changes/refill position descriptions
- View pending position requests

Hire (blue banner) used to:
- Create new postings
- View postings
- View application materials
- Export/Print application materials
- Change status of applicants
- Create hiring proposals
- View pending hiring proposals

User Group Definitions

Your user group is assigned based on your role and authority level within the University’s approval process.

Initiator:
- View position descriptions
- Create new position descriptions
- Request that positions be filled or refilled
- Request changes to position descriptions
- View pending position requests
- Create new postings
- View postings
- View application materials
- Print application materials
- Change status of applicants
- Create hiring proposals
- View pending hiring proposals

Position Description Viewer:
- View position descriptions
- Print position descriptions

Search Committee Member:
- View application materials
- Print application materials

Approver (e.g., Department Head/Chair, Director/Dean/AVP, Provost/VP):
- Approve position description requests
- Approve hiring proposal requests

Employee Group Definitions

Classified:
- Support staff
- Represented by SEIU

Faculty:
- Teaching and Research Faculty
- Represented by AAUP

Admin:
- Academic Professionals
- Excluded Faculty (e.g., Department Chair)
- Executive Committee Members
- Deans
- Associate/Assistant Deans
- Managerial
- Unclassified Excluded/Unrepresented
This section will cover step-by-step instructions to complete the following requests in the Position Management Module:

- View position descriptions
- Print position descriptions
- Create new position descriptions
- Request changes to/refill existing position descriptions

Positions Module (orange)
Where all position descriptions and position description requests reside.
View a Position Description

1. Verify that you are in the “Positions” module and the “Initiator” or “Position Description Viewer” user group.
2. Click on and select the appropriate employee group.
3. Select the desired position description by clicking on the “Working Title.”
4. You may view the position description by clicking on \( \text{Print Preview} \). If you are in the “Initiator” user group, you will see the full position description, with all the data that was entered at the time the position was created. This is \textit{not} the version that should be printed and reviewed with your employee [use \( \text{Print Preview (Employee View)} \)].

Print a Position Description

1. Verify that you are in the “Positions” module and the “Position Description Viewer” user group.
2. Click on and select the appropriate employee group.
3. Select the desired position description by clicking on the “Working Title.”
4. You may view the position description by clicking on \( \text{Print Preview} \). You can print this position description by using your browser tools (“File,” “Print”).

Create a New Position Description (With Option to Fill)

1. Verify that you are in the “Positions” module and the “Initiator” user group.
2. Click on “Position Descriptions” and select the appropriate employee group from the drop-down menu (for this example, “Classified” will be used).
3. Click on the upper right-hand side of the page.
4. You will see “Establish New Classified Position Description” at the top of the page.
5. Enter the (proposed) “Working Title.”
6. Verify the “VP/EXCOM,” “School/Admin Unit,” and “Department” (if you have responsibility for more than one department, enter the appropriate department for this position).
7. To copy (clone request) an existing position for this request:
   a. Choose that position description from the list on the bottom part of the page (this will take you to a view of the selected position description).
   b. Select “Clone this Position Description from the links at the right. Your new request will be populated with pertinent information and allow for edits.
8. Provide all required data and click “Next” at the bottom of each page to move to the next section. You can track your progress on the left of the screen; completed pages will have a green check mark. The green check marks indicate that mandatory fields are complete. However, there may be additional fields to fill in to adequately provide approvers with the information needed to approve and forward the request.
9. Incomplete pages will not have a green check mark.

*Remember to SAVE often!*

10. After completing all mandatory and optional/recommended fields you will be on the “Request Summary” page. You can review the information you entered into the request for accuracy prior to taking action. Click on “Edit” to return to any incomplete page. Once completed, click on “Save.” You can then return to the “Request Summary.”
11. To take action on the request, hover over near the top right of the page and select an option from the drop-down menu. You will have the opportunity to add comments to the request and to add the request to your “Watch List.”
12. A blue bar at the top of the page indicates the action was submitted successfully; a red bar indicates that further action is needed.
13. To save this request and submit later, select “Keep Working on This Request” under the “Take Action on Request” menu.
Request Changes to/Refill an Existing Position Description

1. Verify that you are in the “Positions” module and the “Initiator” user group.
2. Click on “Position Descriptions” and select the appropriate employee group from the drop-down menu (for this example, “Classified” will be used).
3. Search for and select the position description you wish to update by highlighting and clicking on either the “Position Number” or the “Working Title.”
4. Click the link to your right to modify or refill.
5. Click to begin updating the position description.
6. The initial page asks for information to determine whether this update will have a corresponding recruitment to refill the position; this helps to route the request appropriately.
7. Provide all required data and click “Next” at the bottom of each page to move to the next section. You can track your progress on the left of the screen; completed pages will have a green check mark. The green check marks indicate that mandatory fields are complete. However, there may be additional fields to fill in to adequately provide approvers with the information needed to approve and forward the request.
8. Incomplete pages will not have a green check mark.

Remember to SAVE often!

9. After completing all mandatory and optional/recommended fields you will be on the “Request Summary” page. You can review the information you entered into the request for accuracy prior to taking action. Click on “Edit” to return to any incomplete page. Once completed, click on “Save.” You can then return to the “Request Summary.”
10. To take action on the request, hover over near the top right of the page and select an option from the drop-down menu. You will have the opportunity to add comments to the request and to add the request to your “Watch List.”
11. A blue bar at the top of the page indicates the action was submitted successfully; a red bar indicates that further action is needed.
12. To save this request and submit later, select “Keep Working on This Request.”
Hire Module (blue)
Where all postings and applicants reside and where hiring proposals are created.

This section will cover step-by-step instructions to complete the following requests in the Hire Module:

- Create new postings
- View postings
- View application materials
- Export/Print application materials
- Change status of applicants
- Create hiring proposals
Create a New Posting

1. Verify that you are in the “Hire” module and the “Initiator” user group.
2. Click on “Postings” and select the appropriate employee group from the drop-down menu (for this example, “Admin” will be used).
3. Click on the upper right-hand side of the page.
4. Click the “Create from Position Description” link.
5. Search for and select the position description you wish to post by clicking on either the “Position Number” or the “Working Title.”
6. Click the “Create Posting from this Position Description” link on the right.
7. Fill in the appropriate information for Organizational Unit, Applicant Workflow, References, and Online Applications. Click on .
8. Provide all required data and click “Next” at the bottom of each page to move to the next section. You can track your progress on the left of the screen; completed pages will have a green check mark. The green check marks indicate that mandatory fields are complete. However, there may be additional fields to fill in to adequately provide approvers with the information needed to approve and forward the posting.
9. Incomplete pages will not have a green check mark.

Remember to SAVE often!

10. After completing all mandatory and optional/recommended fields you will be on the “Summary” page. You can review the information you entered into the posting for accuracy prior to taking action. Click on “Edit” to return to any incomplete page. Once completed, click on “Save.” You can then return to the “Summary.”
11. To take action on the request, hover over near the top right of the page and select an option from the drop-down menu. You will have the opportunity to add comments to the request and to add the request to your “Watch List.”
12. A blue bar at the top of the page indicates the action was submitted successfully; a red bar indicates that further action is needed.
13. To save this request and submit later, select “Keep Working on This Posting.”

**View Postings and Review Applicants**

1. Verify that you are in the “Hire” module and the “Initiator” (or “Search Committee Member”) user group.
2. Click on “Postings” and select the appropriate employee group from the drop-down menu (for this example, “Admin” will be used).
3. Search for and select the desired posting by clicking on either the “Position Number” or the “Working Title.” This will provide a summary of the posting.
4. To review applicants, click on the “Applicants” tab.
5. Click on an applicant’s name to review all submitted application materials.
6. To export the applicant’s application and/or attached documents, click the “Document Type” or “Recreate PDF” at the bottom of the page. You can print these documents by using your PDF reader (“File,” “Print”).
Change an Applicant Status

1. Verify that you are in the “Hire” module and the “Initiator” user group.
2. Click on “Postings” and select the appropriate employee group from the drop-down menu.
3. Search for and select the desired posting by clicking on either the “Position Number” or the “Working Title.”
4. Click on the “Applicants” tab.
5. Click the applicant’s name.
6. Hover over the “Actions” button (the one at the top of the column) to the right of the screen and select the desired action. Confirm the status change when prompted.
7. Once an applicant has been moved to “Rank 2 (Meets Quals – Secondary Pool),” you may move again, if needed. However, once an applicant has been moved to either “Rank 3 (Meets Minimums, not advanced)” or “Rank 4 (Does not meet minimum qualifications)” the status can be only be changed with assistance from your HR Partner. Setting an applicant to either “Rank 3” or “Rank 4” will also send out an automatic email to the applicant indicating that they are no longer under consideration.

Change Status of Multiple Applicants

1. Verify that you are in the “Hire” module and the “Initiator” user group.
2. Click on “Postings” and select the appropriate employee group from the drop-down menu.
3. Search for and select the desired posting by clicking on either the “Position Number” or the “Working Title.”
4. Click on the “Applicants” tab.
5. Check the boxes to the left of the applicant names for whom you want to change the status.
6. Hover over the “Actions” button (the one at the top of the column).
7. Select “Move in Workflow” under the “Bulk” section of the drop-down menu.
8. In the “Change for all applicants” field, select the status change from the drop-down menu. Once the workflow status and reason is selected for all applicants, click “Save changes.”

9. You may also review information more in depth from the “Actions” drop-down menu by selecting one of the other options.
Create a Hiring Proposal

1. Verify that you are in the “Hire” module and the “Initiator” user group.
2. Click on “Postings” and select the appropriate employee group from the drop-down menu.
3. Search for and select the desired posting by clicking on either the “Position Number” or the “Working Title.”
4. Click on the “Applicants” tab.
5. Click on the applicant’s name.
6. Hover over “Take Action On Job Application” and change status of applicant to “Choose Candidate for Hire (move to Candidate of Choice)” and click on “Submit.”
7. Click the “Start Hiring Proposal” link.
8. The Position Description name should automatically populate in the top left corner under “Selected Position Description.” Click
9. Complete the required fields and click “Next” to move to the next page.
10. Once you complete all information you will be at the “Summary” page.
11. Once on the “Summary” page hover over and select an option from the drop-down menu. You will have the opportunity to add comments to the request and to add the request to your “Watch List.”
12. A blue bar at the top of the page indicates the action was submitted successfully; a red bar indicates that further action is needed.
13. To save this request and submit later, select “Keep working on this Hiring Proposal.”
Approve a (Position Description) Request

1. Verify that you are on the “Home” tab, in either module, and have selected the appropriate approver user group.
2. Click the “Requests” link from the “Inbox.”
3. Locate and select the title of the position.
4. Selecting the title will take you to the “Summary Page” where you can make edits if necessary.
5. To take action on the request hover over and make a selection from the drop-down menu. You will have the opportunity to add comments to the request and to add the request to your “Watch List.”
6. A blue bar at the top of the page indicates the action was submitted successfully; a red bar indicates that further action is needed.
7. To save this request and submit later, select “Keep Working on This Request.”

Typical Workflow (Routing) for Position Request
Approve a Hiring Proposal

1. Verify that you are on the “Home” tab, in either module, and have selected the appropriate approver user group.
2. Click the “Hiring Proposals” link from the “Inbox.”
3. Locate and select the title of the position.
4. Selecting the title will take you to the “Summary Page” where you can make edits if necessary.
5. To take action on the request hover over and make a selection from the drop-down menu. You will have the opportunity to add comments to the request and to add the request to your “Watch List.”
6. A blue bar at the top of the page indicates the action was submitted successfully; a red bar indicates that further action is needed.
7. To save this request and submit later, select “Keep Working on This Request.”
**Locate a Position Description Request**

1. Verify that you are in the “Positions” module (orange).
2. Check to see if the PD request is in your “Watch List” on the “Home” screen.
3. If it is not on your “Watch List,” click on “Position Descriptions” and select the appropriate employee group requests from the drop-down menu.
4. Click on next to the blank search box at the top of the screen.
5. Ensure that all options in the “Status” field are selected.
6. Enter the Position Number or Working Title in the “Search” field and click .
7. To identify who currently “owns” the request (who has to take action on the request) click on the “Position Number” and the current owner will be listed at the top of the summary page.
8. To view the full historical details of the request click on the “History” tab.

**Locate a Pending Hiring Proposals**

1. Verify that you are in the “Hire” module (blue).
2. Check to see if the hiring proposal is in your “Watch List” on the “Home” screen.
3. If it is not on your “Watch List,” click on “Hiring Proposals” and select the appropriate employee group from the drop-down menu.
4. Click on next to the blank search box at the top of the screen.
5. Ensure that all options in the “Status” field are selected.
6. Enter the Position Number or Working Title in the “Search” field and click .
7. To identify who currently “owns” the hiring proposal (who has to take action on the hiring proposal) click on the “Position Number” and the current owner will be listed at the top of the summary page.
8. To view the full historical details of the hiring proposal click on the “History” tab.
**Navigation**

1. In addition to using the button, you may use your browser back arrow as needed.

**Logout**

1. The system will log you out after 60 minutes of inactivity. Pages are automatically saved as you progress from page to page. You may also click on if there is a risk that interruptions will cause you to lose the work you have done.
2. To logout of PeopleAdmin, click on “logout” in the upper right corner of the screen.

**Reports**

If you or your department needs a report created from the data in PeopleAdmin, please contact your HR Partner in the Office of Human Resources.

**Training**

1. For PeopleAdmin training opportunities, please refer to the Human Resources training website at https://www.pdx.edu/hr/training-and-development.
2. You may also contact your HR Partner in the Office of Human Resources to arrange for one-on-one and/or small group training sessions.